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Andy Robinson

Building Your Board & Raising More Money

Plattsburgh, 5/2/24

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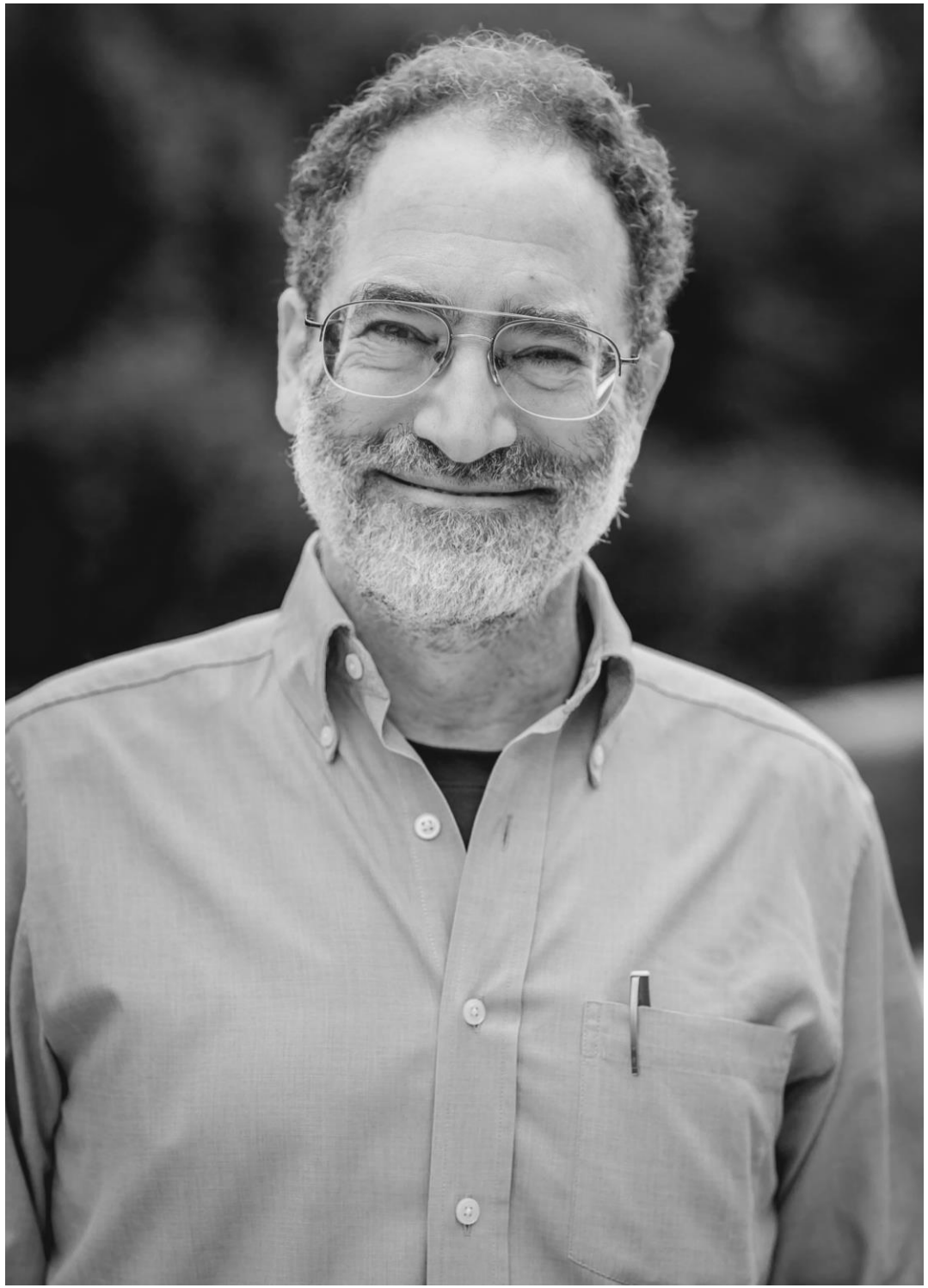


Welcome!

I’m Andy…

Author, trainer, board president, and the Swiss Army knife of nonprofit consultants

Getting started…

Why are you here?

What do you want

to learn today?

Topics for today's workshop

- Four stages: How groups change over time
- Designing your best board and recruiting to fill the gaps
- Using board job descriptions
- Volunteer recruitment and management
- Building a diverse revenue mix
- Redefining fundraising to make it more accessible and successful

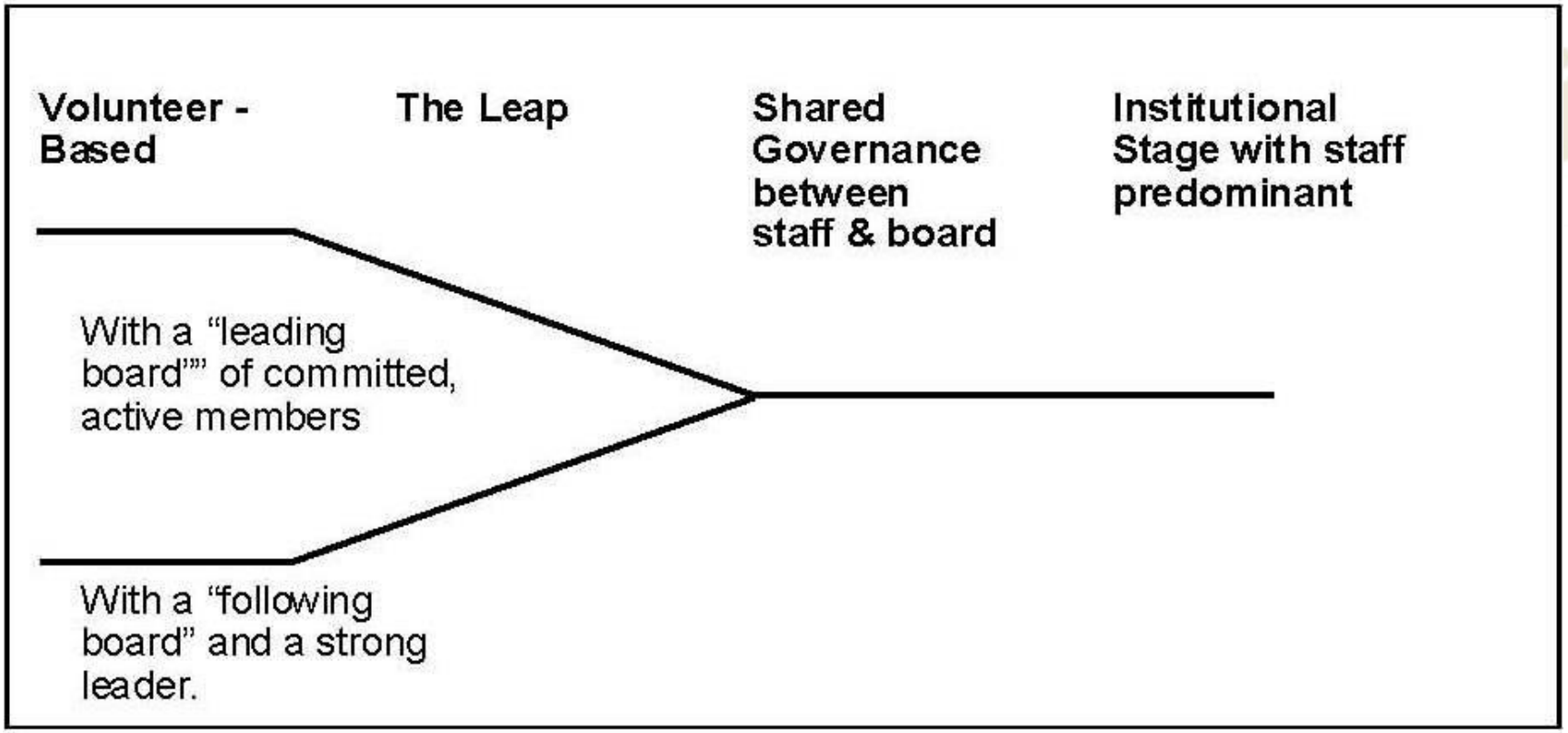
Part 1

Board recruitment and development

How organizations change:

The Four Stages

Because the board's role changes at each stage…



Adapted with permission from Institute for Conservation Leadership, www.icl.org

Designing your best board

Skills, qualities, representation

Skill, quality, representation	SJN	NO	PQ	BC	ET	RA	TC	SZ	AR

Simple scoring system

+ outstanding

√ adequate

- poor

? don't know

Skill, quality, representation	SJN	NO	PQ	BC	ET	RA	TC	SZ	AR
Meeting facilitation	+	-	?	+	+	-	-	√	+
Team player	√	√	+	√	+	√	-	+	+
Available time	+	-	-	√	√	+	+	√	-
Board experience	√	√	+	+	?	-	+	√	√
Willing to fundraise	+	-	?	?	+	?	-	+	?

Exercise

Brainstorm the **skills, qualities,** and **representation** needed to strengthen your board.

Use this tool to:

- *Identify gaps* on your board
- *Proactively recruit people* to fill gaps

The alternative – “I know a guy…” – results in a randomly-created board… and you get random results.

Why you need a **board job description**

- Sets clear expectations
- Helps with recruitment
- Clarifies what board members can expect from the organization
- Weeds out poor candidates

What board members provide	What they can expect in return
I will give my best effort to “hit the ground running”	I expect a full orientation and a board mentor
I will take my fiduciary responsibility seriously	I expect to be trained to understand our financials
I commit to being an informal ambassador	I will need training, support, and materials
As a donor, our group will be one of my top three charitable commitments	I will have the option of fulfilling my pledge in monthly payments

Exercise

What would you include in your board job description?

Part 2

Everyone can help raise money!

To raise money successfully, you need four things

- A strong case for giving
- Prospective donors to ask
- People to do the asking
- Systems to track data, money, donor recognition, etc.

Most nonprofits can strengthen all these areas, but here's the biggest challenge

√ A strong case for giving

√ Prospective donors to ask

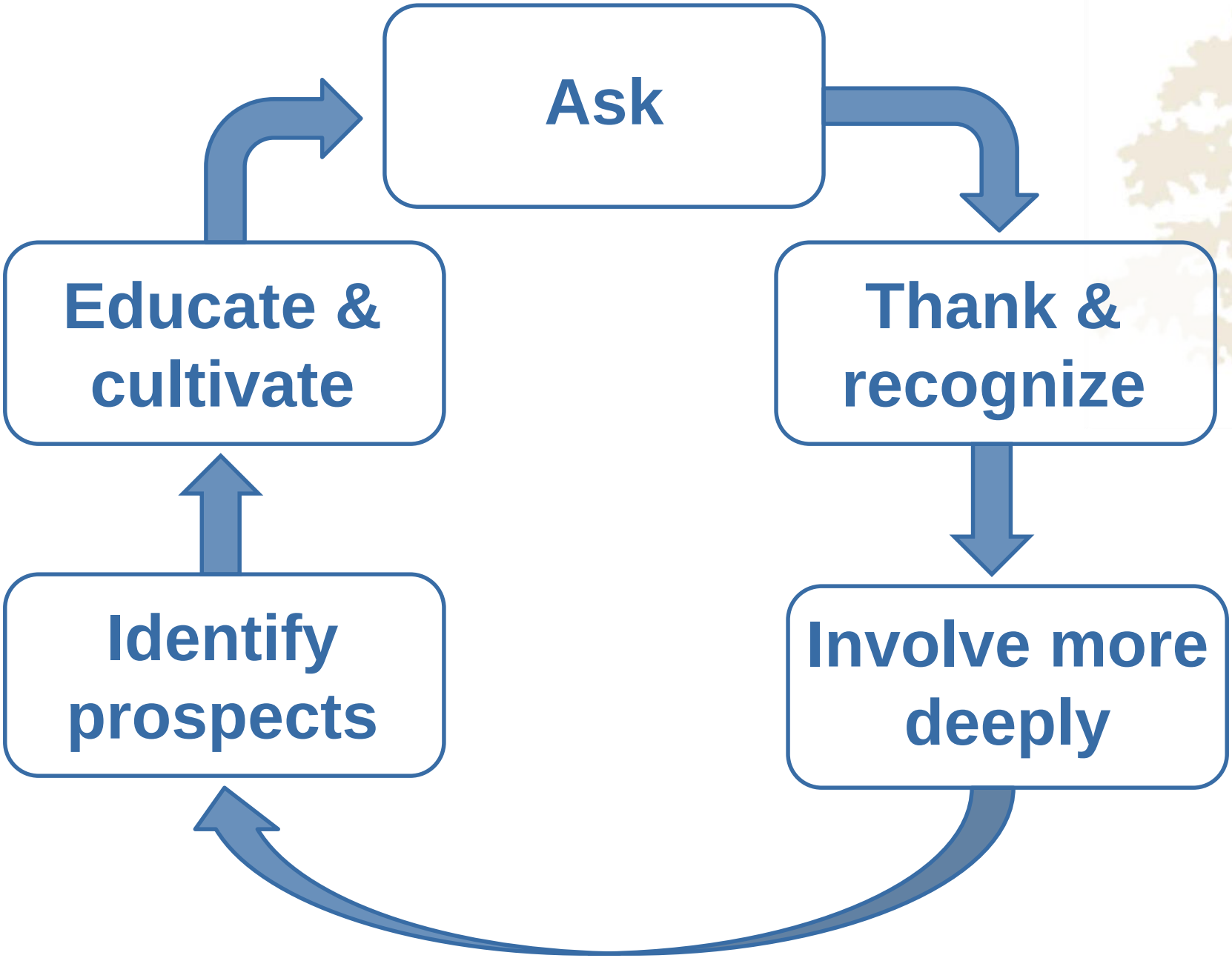
!!! Not enough askers

√ Systems to track data, money, donor recognition, etc.

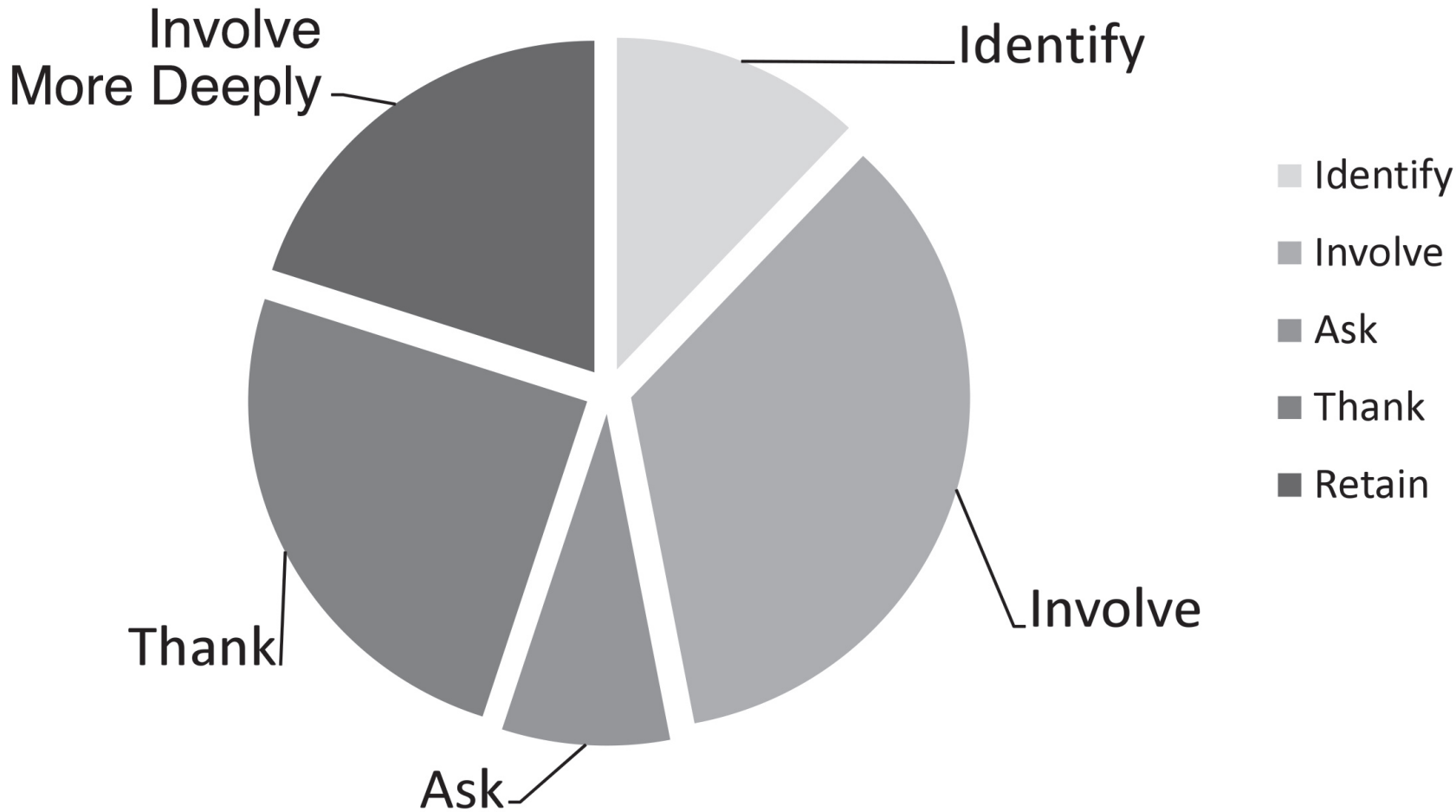
However, not everyone will be an asker, so we have to ***redefine fundraising*** to better engage our volunteers –

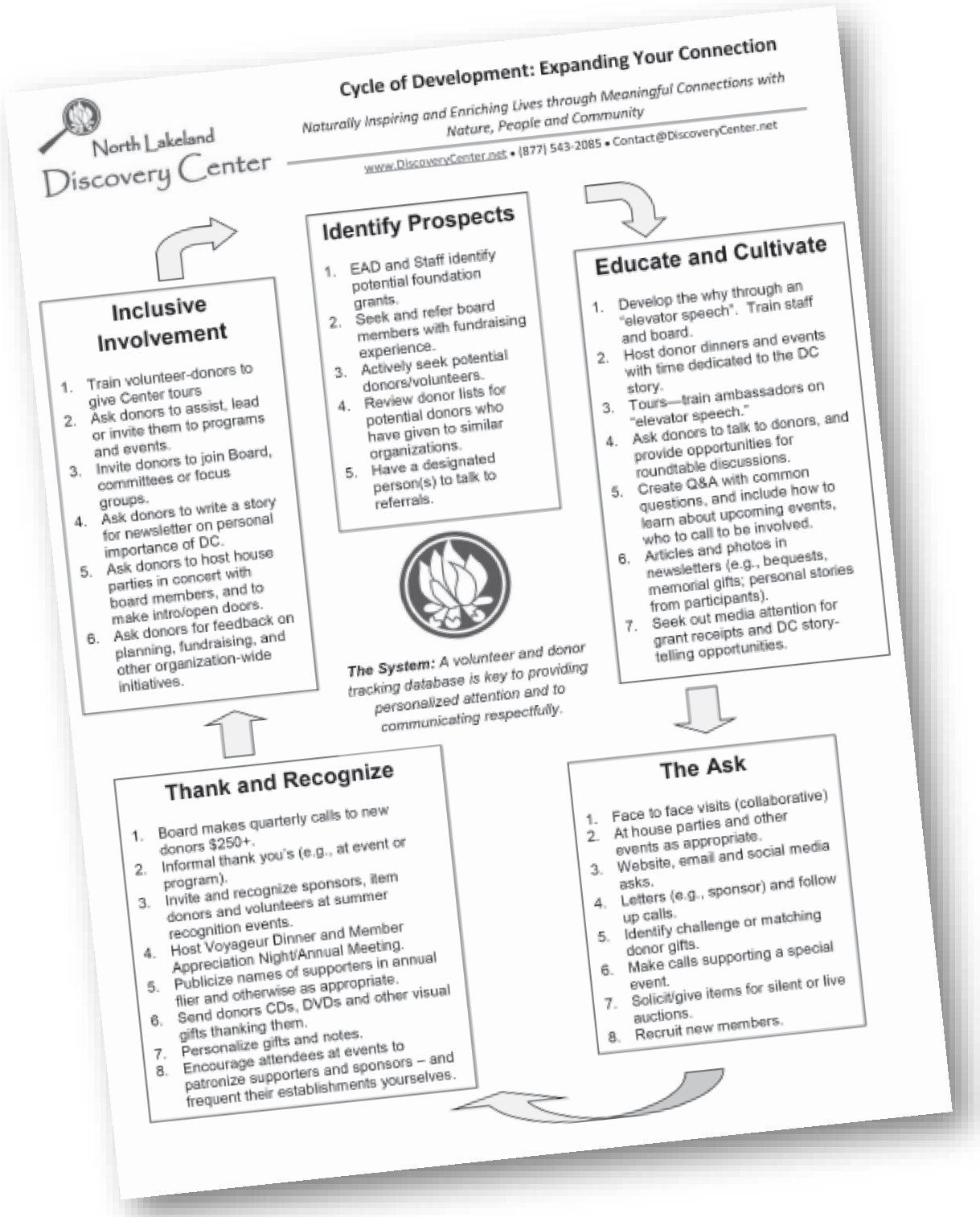
It’s not just about asking for money

Cycle of fundraising



Time allocation





North Lakeland Discovery Center

Cycle of Development: Expanding Your Connection

Naturally Inspiring and Enriching Lives through Meaningful Connections with Nature, People and Community

www.DiscoveryCenter.net • (877) 543-2085 • Contact@DiscoveryCenter.net

Identify Prospects

1. EAD and Staff identify potential foundation grants.
2. Seek and refer board members with fundraising experience.
3. Actively seek potential donors/volunteers.
4. Review donor lists for potential donors who have given to similar organizations.
5. Have a designated person(s) to talk to referrals.

Educate and Cultivate

1. Develop the why through an "elevator speech". Train staff and board.
2. Host donor dinners and events with time dedicated to the DC story.
3. Tours—train ambassadors on "elevator speech."
4. Ask donors to talk to donors, and provide opportunities for roundtable discussions.
5. Create Q&A with common questions, and include how to learn about upcoming events, who to call to be involved.
6. Articles and photos in newsletters (e.g., bequests, memorial gifts; personal stories from participants).
7. Seek out media attention for grant receipts and DC story-telling opportunities.

The Ask

1. Face to face visits (collaborative)
2. At house parties and other events as appropriate.
3. Website, email and social media asks.
4. Letters (e.g., sponsor) and follow up calls.
5. Identify challenge or matching donor gifts.
6. Make calls supporting a special event.
7. Solicit/give items for silent or live auctions.
8. Recruit new members.

Thank and Recognize

1. Board makes quarterly calls to new donors $250+.
2. Informal thank you's (e.g., at event or program).
3. Invite and recognize sponsors, item donors and volunteers at summer recognition events.
4. Host Voyageur Dinner and Member Appreciation Night/Annual Meeting.
5. Publicize names of supporters in annual flier and otherwise as appropriate.
6. Send donors CDs, DVDs and other visual gifts thanking them.
7. Personalize gifts and notes.
8. Encourage attendees at events to patronize supporters and sponsors – and frequent their establishments yourselves.

Inclusive Involvement

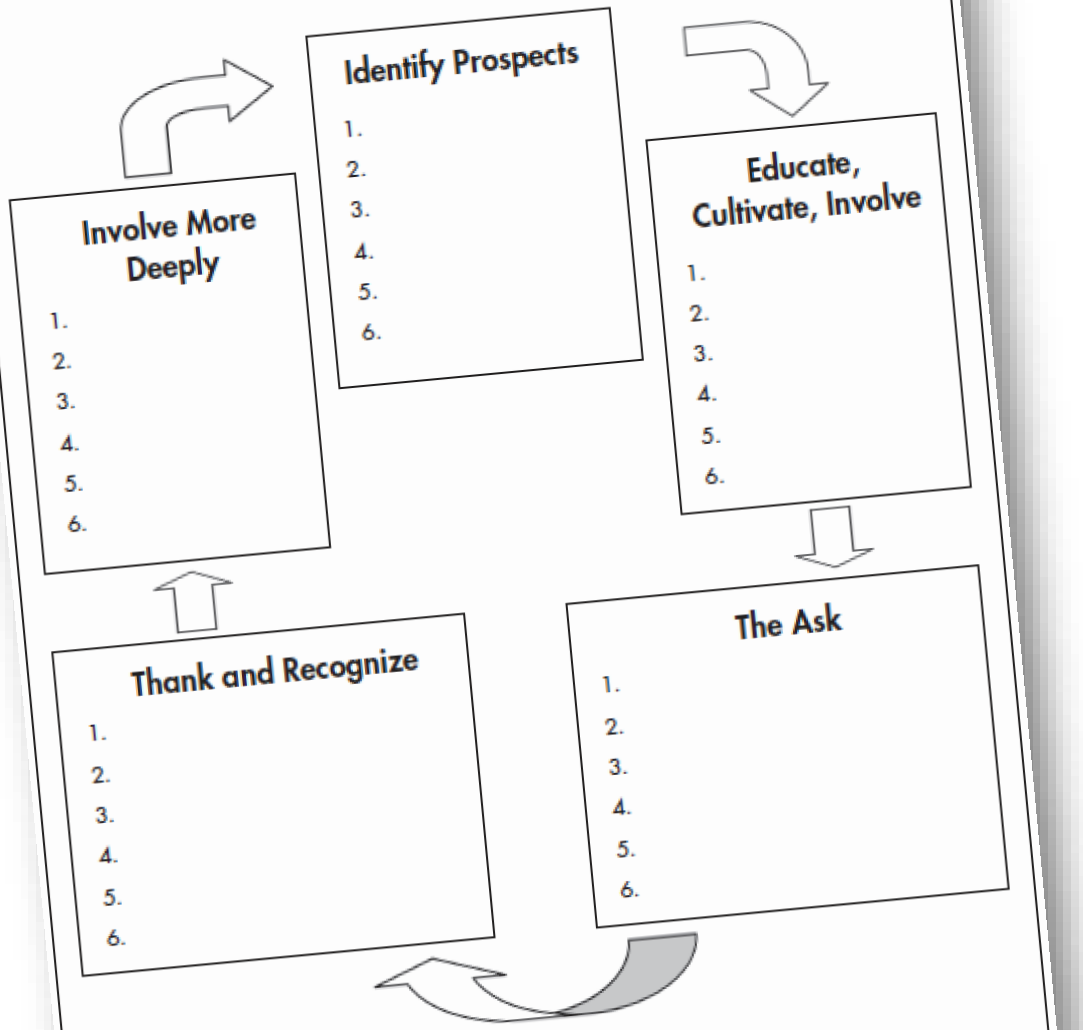
1. Train volunteer-donors to give Center tours
2. Ask donors to assist, lead or invite them to programs and events.
3. Invite donors to join Board, committees or focus groups.
4. Ask donors to write a story for newsletter on personal importance of DC.
5. Ask donors to host house parties in concert with board members, and to make intro/open doors.
6. Ask donors for feedback on planning, fundraising, and other organization-wide initiatives.

The System: *A volunteer and donor tracking database is key to providing personalized attention and to communicating respectfully.*

Cycle of Fundraising

BUILDING A DONOR ENGAGEMENT MENU

Create a menu of activities for each stage of the relationship:



Breakouts: Cycle of fundraising

- Working in teams, brainstorm and fill in the template
- OK to use sample (North Lakeland Discovery Center) for inspiration

Where's the money?

Income for US nonprofits

$400 - $450 billion	Philanthropy
$650 - $700 billion	Public funding
$1 trillion	Earned income
$2 trillion +	**Total income**

Source: Nonprofit Quarterly's Nonprofit Economy 2020

The biggest challenge in fundraising is **scarcity mentality.** If you know where to look – and you're willing to do the work – there's plenty of money.

U.S. Philanthropy

$499 billion in 2022

21%	Foundations
6%	Corporations
64%	Individuals
9%	Bequests

Source: Giving USA 2023

- 50% + of households contribute
- The typical household supports 5-10 organizations per year.
- The median amount contributed per household is $900 per year

Income sources for nonprofits

Grants

- Foundations
- Corporations
- Public charities
- Government
- Service clubs
- Faith-based

Individuals

- Membership
- Major gifts
- Monthly giving
- Online giving
- Crowdfunding
- Benefit events
- Workplace giving
- Planned gifts

Earned income

- Goods
- Services
- Investment income
- Cause related marketing

	Pros	Cons
Grants	• Large amounts • Program funds • Get organized!	• Lousy odds • Restricted money • Mission drift
Individuals	• Lots of options • Unrestricted $ • Community support • “Lifetime value”	• Donor retention and upgrading takes effort • Board resistance
Earned Income	• Improved financial systems • Greater program impact? • Diversification	• Underpricing • Some programs can’t be monetized • Risk

Understand your revenue model!

- Where do you get your money now?
- What's the best mix of money for your organization?
- What changes do you need to make?

Fundraising: Three things that every board member can do

- Give money
- Give names
- Participate

Everyone must *give money* because:

- Karma: It's easier to raise money if you give it yourself
- It's a litmus test: Are you prepared to lead if you're not prepared to invest?
- People are watching: Donors ask, "Do you have 100% board giving?"

Everyone must *give* *names* because:

- All fundraising begins with the creation of lists
- 70% of the people you know give to nonprofits
- The average American adults knows 150-200 people

Everyone must *participate* because:

- The more people involved, the more money you raise
- We need to break down the false division between program work and fundraising

Building a board fundraising menu

Menu of 2017
Fundraising Opportunities

Board Member: _____ Date: _____

This is an "all you can eat" menu!
We ask you to commit to as many items as you like – but at least one per category.

Appetizers
- ❑ Provide names of donor prospects
- ❑ Personalize letters to current and prospective donors
- ❑ Attend and mingle with donors at a House Party
- ❑ Introduce development staff to members of the business community

Entrees
- ❑ Host a House Party
- ❑ Arrange a site tour for some of your friends, conducted by the Executive Director
- ❑ Accompany the Executive Director or other staff on donor visits
- ❑ Organize a 2-hour volunteer party with friends or colleagues
- ❑ Recruit new board members with fundraising experience and connections
- ❑ Recruit Wintergreens or Farm Party sponsors
- ❑ Volunteer to help at Wintergreens or the Farm Party

Desserts
- ❑ Collect copies of other organizations' solicitations and annual reports for GCH staff
- ❑ Make thank you calls to donors
- ❑ Promote and attend one of our annual events and mingle with donors

Sample board fundraising agreement

Name _____ Date _____

To support the mission of our organization, I agree to take on the following:

1. My gift: $_____ Payment completed by (date) _____

Terms of payment (check, credit card, installments, etc.) _____

_____

2. Prospects. I will provide names and contact information for _____ prospects by (date) _____. Even if I am unable to follow up with all of these people personally, I will still add names to the list for mailings, event invitations, etc.

Sample board fundraising agreement (continued)

3. My fundraising support tasks (taken from our menu):

a. Activity_____

Date(s) _____

Projected revenue (if applicable) $_____

Help / support needed from staff or board _____

_____

b. Activity _____

Date(s) _____

Projected revenue (if applicable) $_____

Help / support needed from staff or board _____

_____

c. Activity_____

Date(s) _____

Projected revenue (if applicable) $_____

Help / support needed from staff or board _____

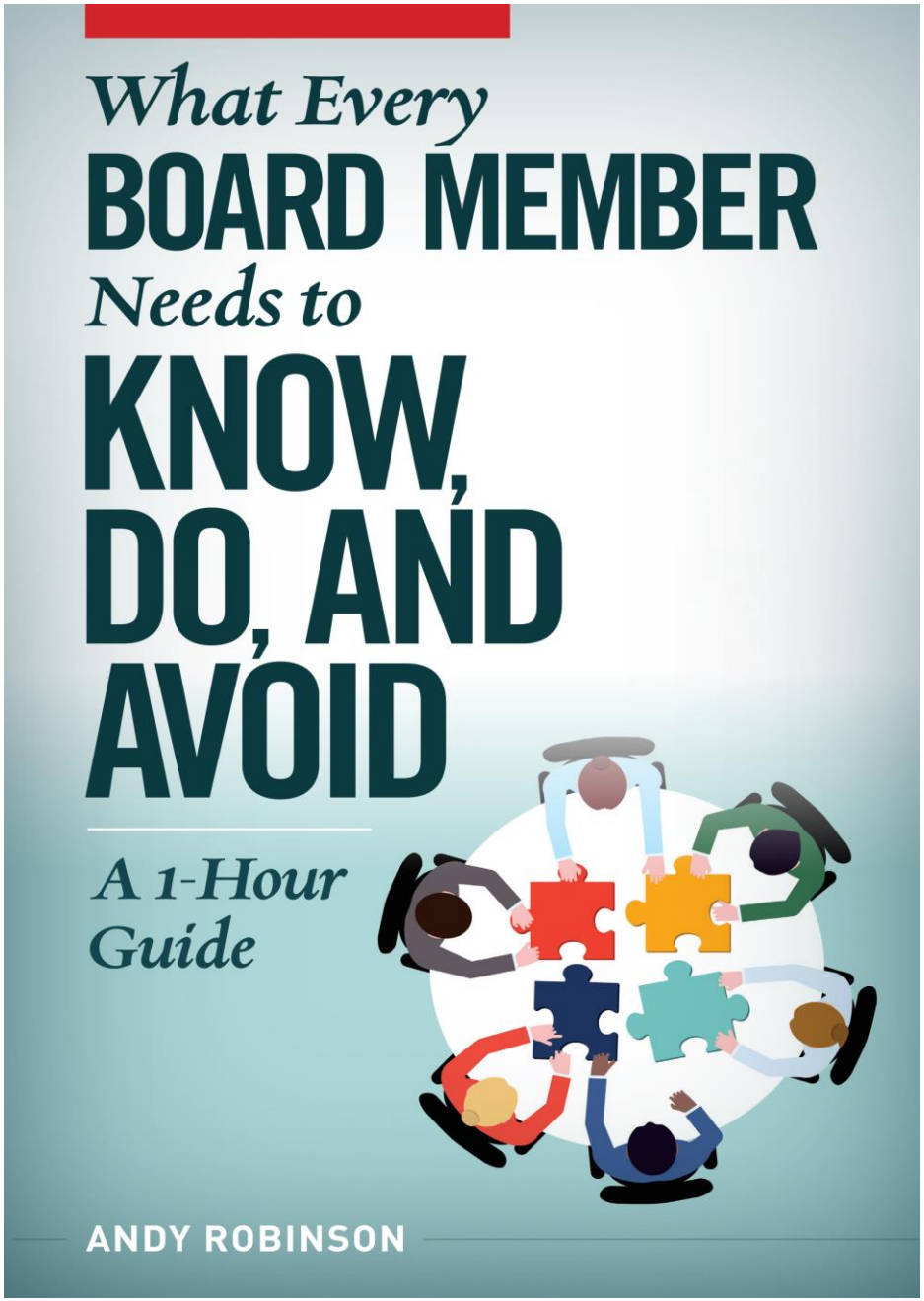
_____

_____ _____

Signature of board member/volunteer Signature of board chair

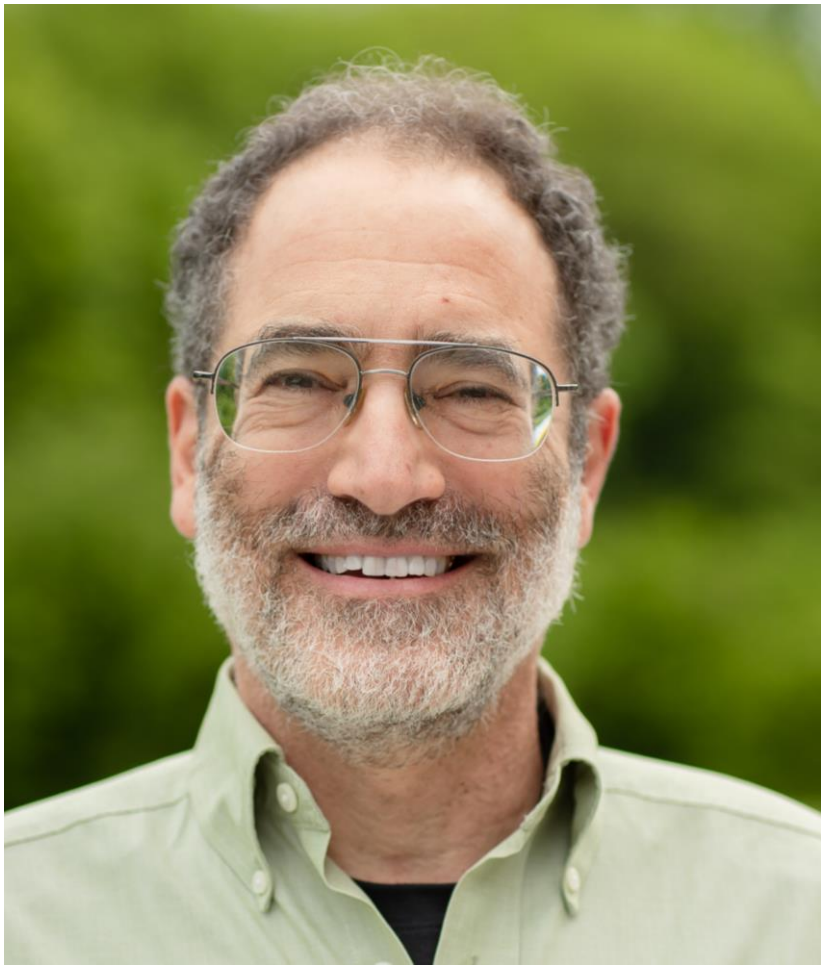
Action Planning

How will you implement what you learned today?



Andy's latest book

Available from https://hilborn-civilsectorpress.com/



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