

# Unlocking Board Potential

Activating Volunteers  
for Fundraising Success

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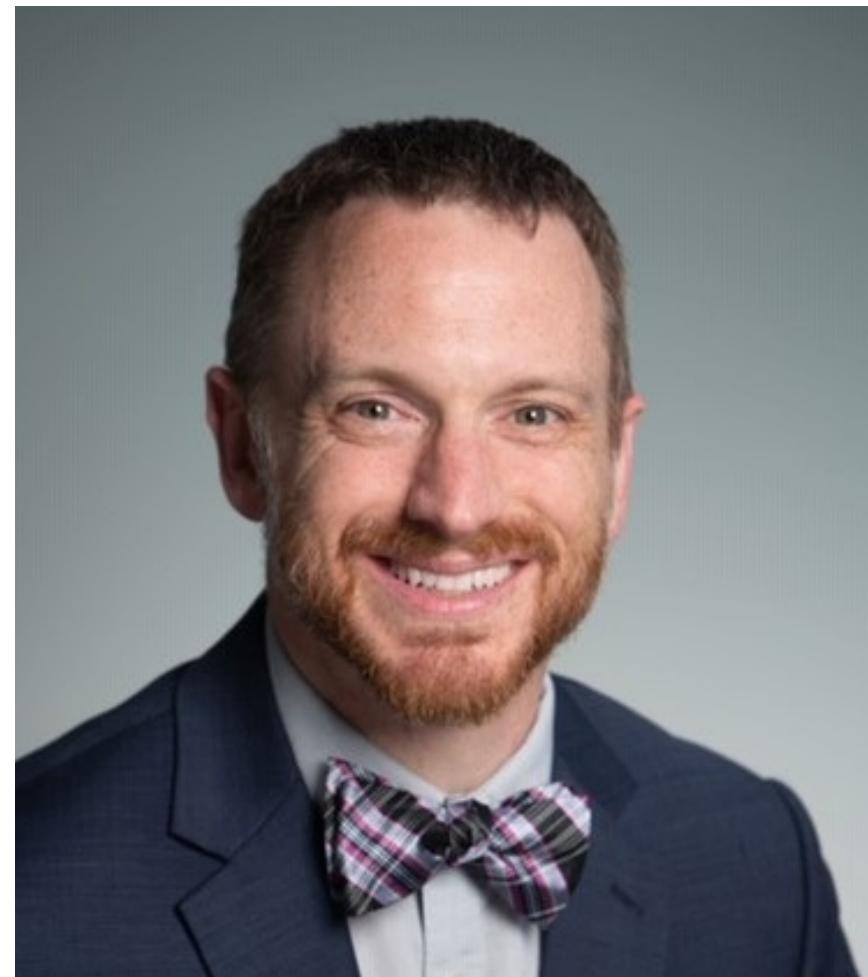


[www.ResolutePhilanthropy.com](http://www.ResolutePhilanthropy.com)



Presented By : Chris Baiocchi

# About Me



- Chris Baiocchi, MAOL, CFRE (he/him)
- Background in journalism, corporate communications, and fundraising
- Worked with big shops (St. Joseph Hospital), mid-sized shops (Habitat for Humanity of Orange County), and small shops (Washington Golf Foundation)
- Helped nonprofits go from \$0 to \$1M+



# Two Caveats

- A word about scaling.
- A word about privilege.



# Ground Rules



- PDF of the presentation will be shared
- Time for questions
- Use the chat for questions, too!



# Fitness vs. Construction



*Think this*



*Not that*

The goal is not a “perfect” organization - but an **improving** one.

# Curiosity vs. Expertise



*Think this*



*Not that*

How can we do more **for** and **with** the community we serve?

# Inviting vs. Demanding



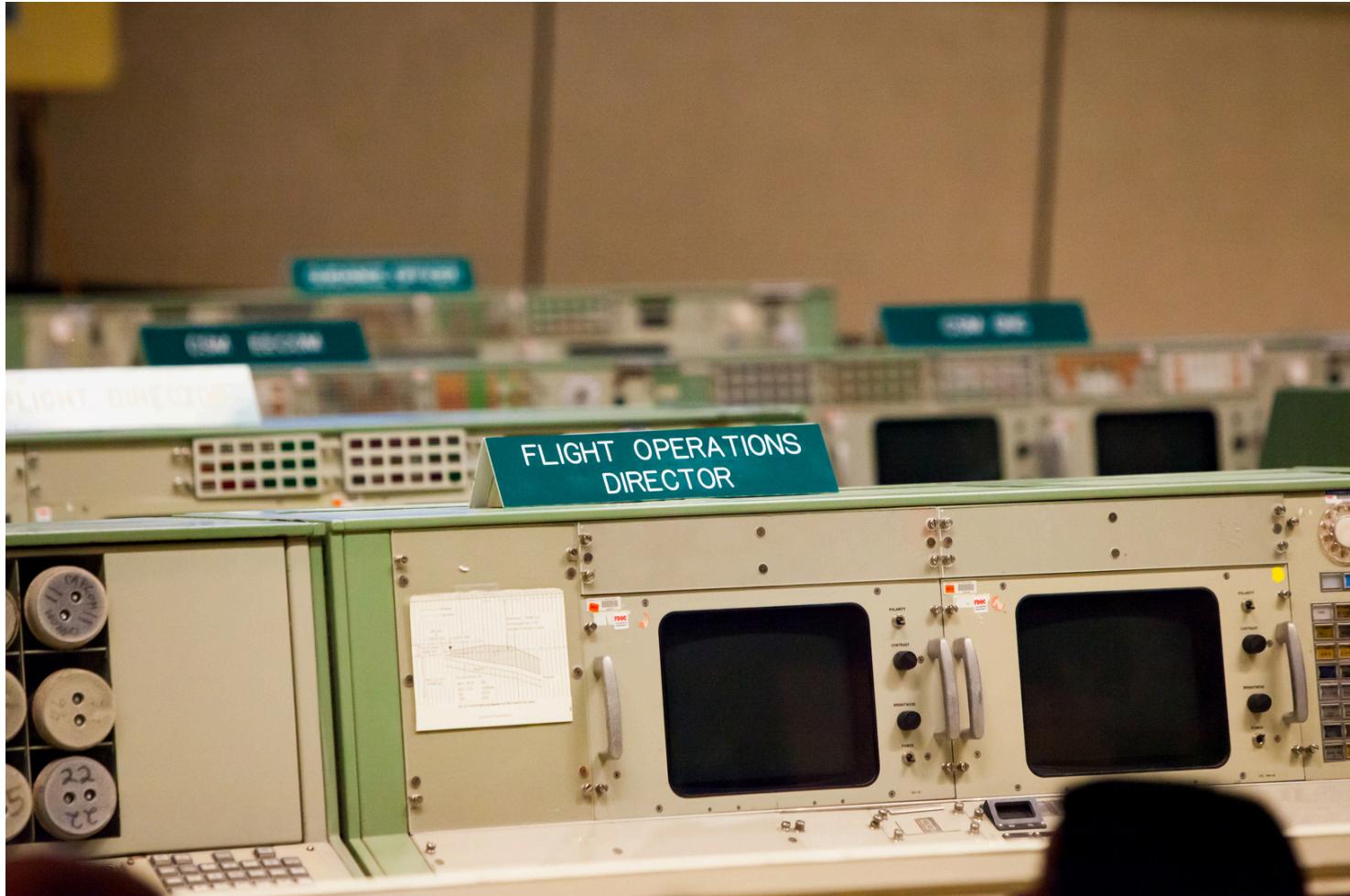
*Think this*



*Not that*

Fundraising isn't about asking everyone you can.  
It's about finding people that connect with the cause and **inviting them** to join you.

# Strategy vs. Tradition



*Think this*



*Not that*

What got you here might not get you where you want to go.  
Your organization's traditions aren't a substitute for strategy.

# Icebreaker



What's the last thing you recommended to someone?

For example, a book, a movie, a contractor, etc.



# Agenda & Goals

Fundraising is a key responsibility for nonprofit board members. But what does that mean?  
And how can all board members support the organization's fundraising efforts?

## Effective Fundraising

A quick recap on what effective fundraising looks like.

## Fundraising Boards

How has the traditional role of a fundraising board changed?

## Fundraising Toolkit

How to prepare board members for fundraising success.

# Fundraising 101

*What do we mean when we talk about fundraising?*

- Connecting supporters to your mission
- Securing funding needed to serve your clients
- A variety of activities and strategies
- Art & science
- Investment in the future of the mission
- Donors don't give **to** you, they give **through** you
- Fundraising is **relational, sustainable, and inclusive**



# Effective Fundraising

- Relationships, not transactions
- Data-driven
- Diverse streams of fundraising
- Development - not instantaneous
- Provides multiple channels for supporters to connect with the mission
- Focused on retention over acquisition
- Focus on alignment over capacity



# Fundraising & Vision

A fundraising program needs a bold and compelling vision.

Without a vision of the future, fundraising is focused on maintaining the status quo.

Fundraising stories are about the future: what's possible, what we can achieve together.



# Fundraising Boards - Then

- The Board led all fundraising efforts
- Solicit friends and colleagues
- Lots of quid-pro-quo fundraising
- The board was a place for wealthy individuals.



# Fundraising Boards - Then

This model assumed that ...

- The most important board member trait was wealth
  - This also led to the belief that wealth=expertise
- Donating was more important than connecting
- Supporting = donating



# Fundraising Boards - Now

- More professional knowledge and skills
- Professional staff
- More savvy donors
- More ways to give and to get involved
- More info about nonprofits



# Fundraising Boards - Now

What does this mean for board members?

- Members have more responsibility and authority
- Members are part of a more complex organization
- Organizations need members with a variety of skills and networks
- More ways to support a nonprofit mission



# Board Member Support

- Ambassadors / Connectors
  - Networking / Outreach
- Advocates
  - Issue-based support
- Professional skills and contacts
- Donors to the mission - let's talk about give/get policies...



# The Power of Networks



- The secret power of every board member
  - Remember - not about capacity
  - Remember - not about gifts
- Sharing values, inviting people to the party
- Types of networks:
  - Employers (current and former)
  - Schools
  - Friends
  - Faith & community groups
  - Sports & hobbies
  - Professional associations

# Saw This & Thought of You



What makes a meaningful and effective recommendation?

- Your experience
- The existing relationship
- Thoughtfulness of the recommendation
- Personalized vs. generalized

# The Power of Stewardship



Board members can play a critical role in donor stewardship.

A simple act of gratitude will stand out to your donors!

- Phone calls
- Notes
- Connecting at events
- Thank-a-thons

# why why Matters



- Default nonprofit language starts to answer “what” and “how” questions
- “Why” answers start to connect with values and emotions
- Emotions - and stories that touch on emotion - drive us to make decisions
- *“By why I mean what is your purpose, cause, or belief? Why does your company exist? Why do you get out of bed every morning? And why should anyone care?”*
  - Simon Sinek

# The Wallet Card



- What they say they need:
  - The Wallet Card
  - Facts & Figures
  - Impact Numbers
  - The Elevator Pitch

# Fundraising Toolkit



- What they really need:
  - A personal “why” story
  - A staff connection
  - A next step or on-ramp

# Toolkit in Action

- A personal “why” story
  - Illustrates the organization’s values
  - Personalizes the mission
  - Invites curiosity
- A staff connection
  - Provides context / deeper answers
  - Builds a follow-up opportunity
  - Serves as the expert
- A next step or on-ramp
  - Continues the conversation
  - Provides additional info
  - A natural progression



# Your Turn

- Individual work - Why do you support your organization?
  - Be specific
  - Why are you giving your time? Your expertise?
  - This is **your** answer
- Group work - share your answers
  - Practice
  - Share at meetings
  - Practice (again)



# Putting it Together

- Board member success as a fundraiser comes as a **connector** and **steward** - not just asking for gifts.
- Fundraising comes from **relationships** - board members can help to build those relationships.
- It starts with **referrals** between board member networks and the organization.
- Board members can practice their **stories** - and remember their **contact** & the next **on-ramp**.



Questions?

Comments?

Takeaways?

# Stay in Touch



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