

Unlocking Board Potential

Activating Volunteers
for Fundraising Success



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



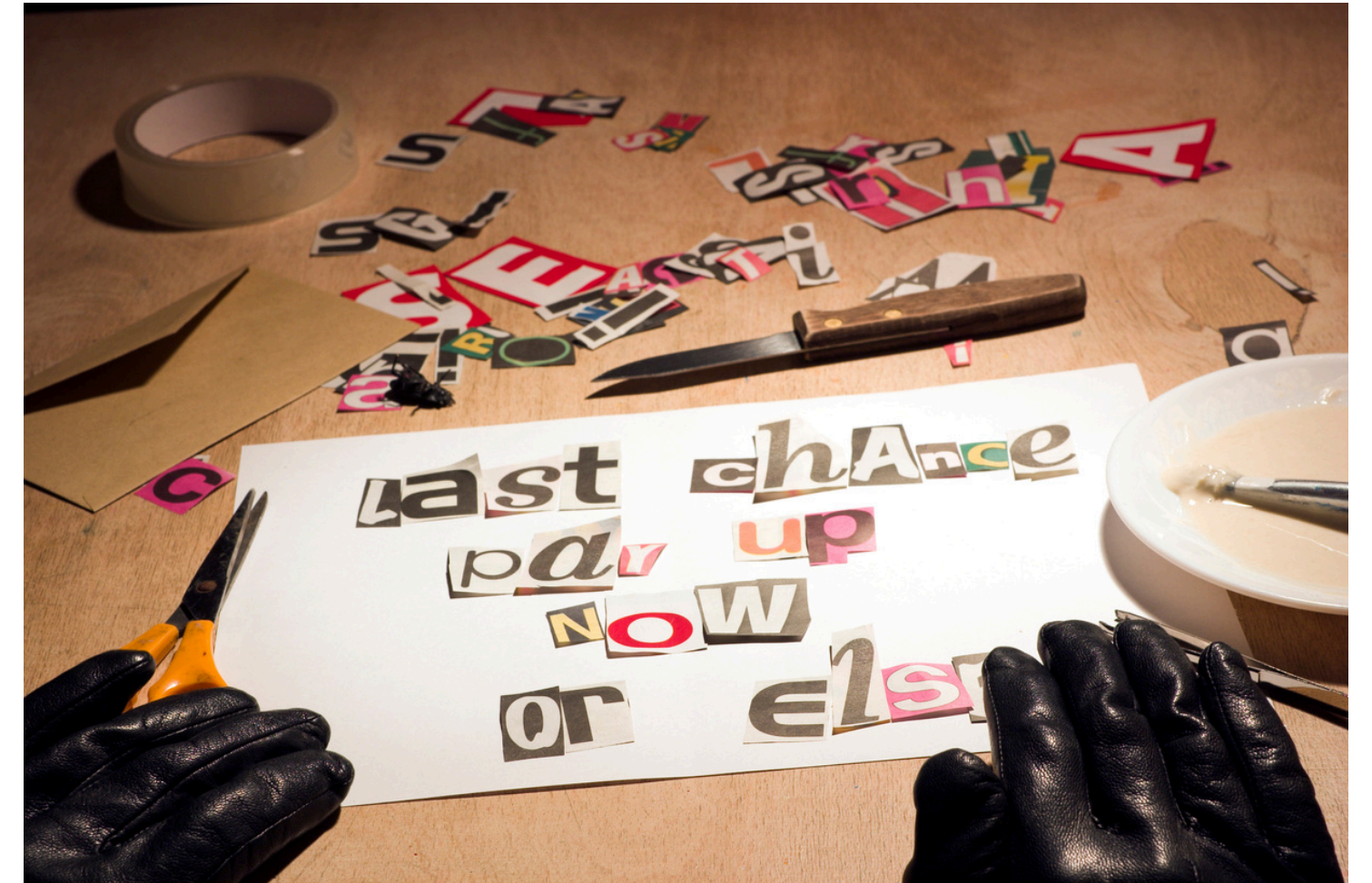
Not that

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

Inviting vs. Demanding



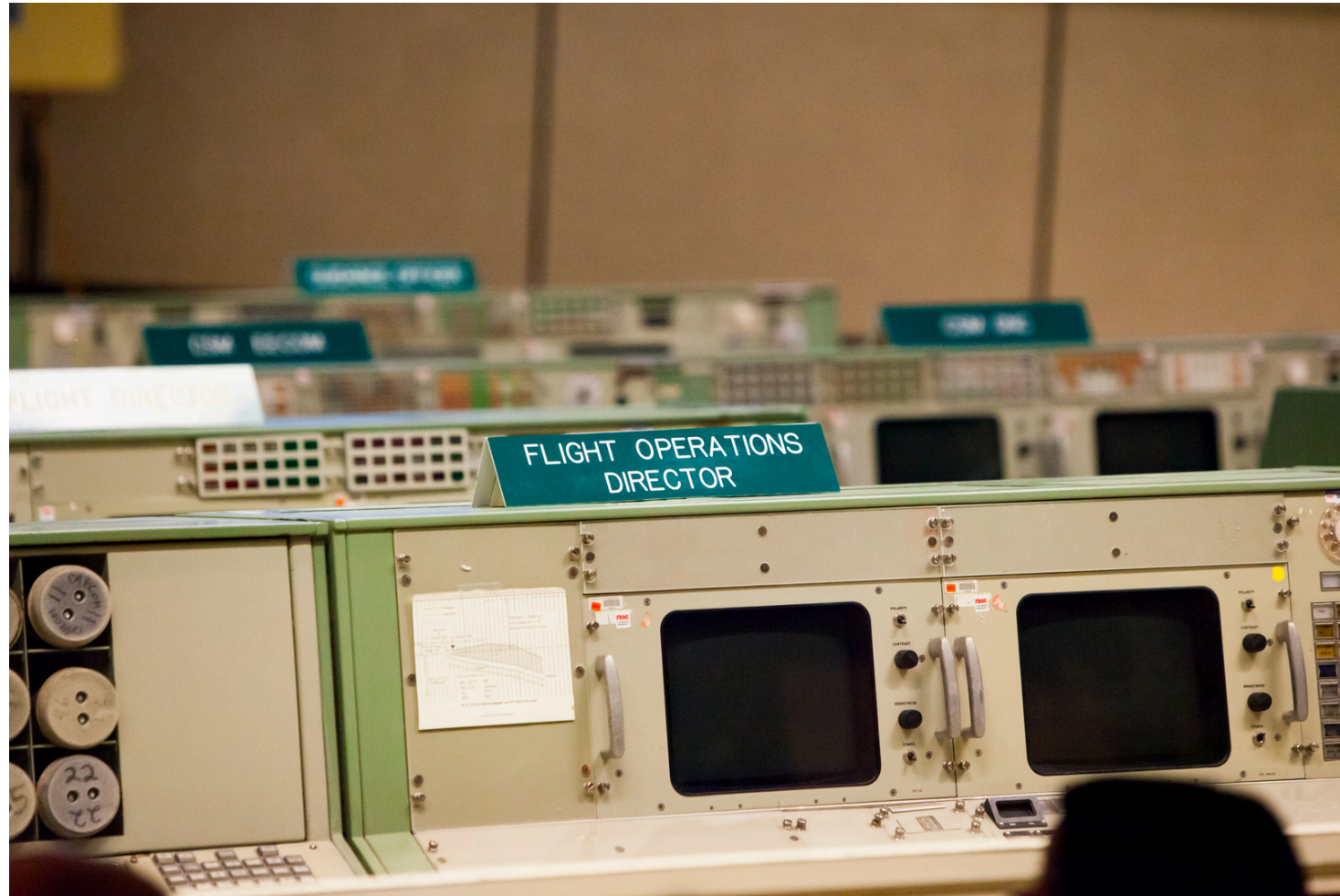
Think this



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



Chris@ResolutePhilanthropy.com



www.Linkedin.com/in/Baiocchi



714-815-8201



www.ResolutePhilanthropy.com



www.youtube.com/@resolutephilanthropy