

Transforming Ordinary People into

FUNDRAISING SUPERHEROES!



Erie, PA, October 2011

**My goal for today is
that you find ways
to work smart and
not hard as well as
learning from the
fundraising
successes and
“learning
opportunities” of
your colleagues.**

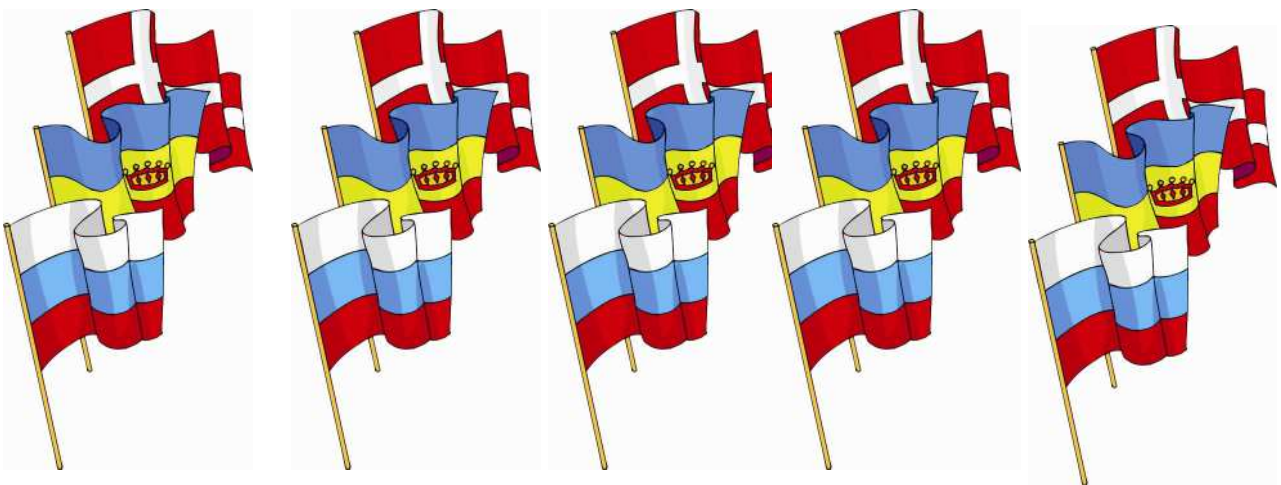
The world according to Carol:

Some assumptions:

- Fund raising isn't easy (But you already knew this!)

One reason is that there are more nonprofits than ever before.

It isn't fair. Remember MDA.



If you are getting more than 50% of your money from one source, you are highly vulnerable.

Which of these sources do you believe to be infallible?

- Fee for service?
- Real estate income?
- Endowment income from Investments in the market
- State, local or federal funding?
- Philanthropic gifts?



You can't afford the 80/20 rule. All board and staff have to be involved in revenue development.



Everyone needs to be involved in the process

Do not just Whack 'n Plaque your current board

You might have to recruit new talent if current members are not invested in learning about and participating in the fundraising process, however there is a place for everyone in your organization. They might choose to share their gift in other ways.





Remember,
the most
common
reason
people don't
give...

Fundraising is changing.

Remember the
“Get-Out” section of your
local paper and how you
find a movie time in your
household

The 2010 stats on giving in America

From the Association of
Fundraising Counsel:

\$303 Billion Given

Individuals _____

Bequests _____

Corporations _____

Foundations _____

If you don't have a strategy that involves soliciting individuals, why not?



An individual approach should have a heart and head component

Buying has changed

We buy on credit.

We will also give on credit.

The wealthy will give on a credit card and so will those of modest means.

Fundraising on the net: A snapshot

(Data from a study by Chronicle of Philanthropy)

6 in 10 Charities say they are raising more money this year than last year

9 Charities in the survey received gifts of \$100,000 or more (may it be your this year!!!)

The local chapter of the Leukemia and Lymphoma Society raised \$79 Million on-line

On-line giving still accounts for only 1.5% of all donations

Early adapters and charities who have upgraded their websites are doing better than others.

What do board members say about fundraising?:

1.

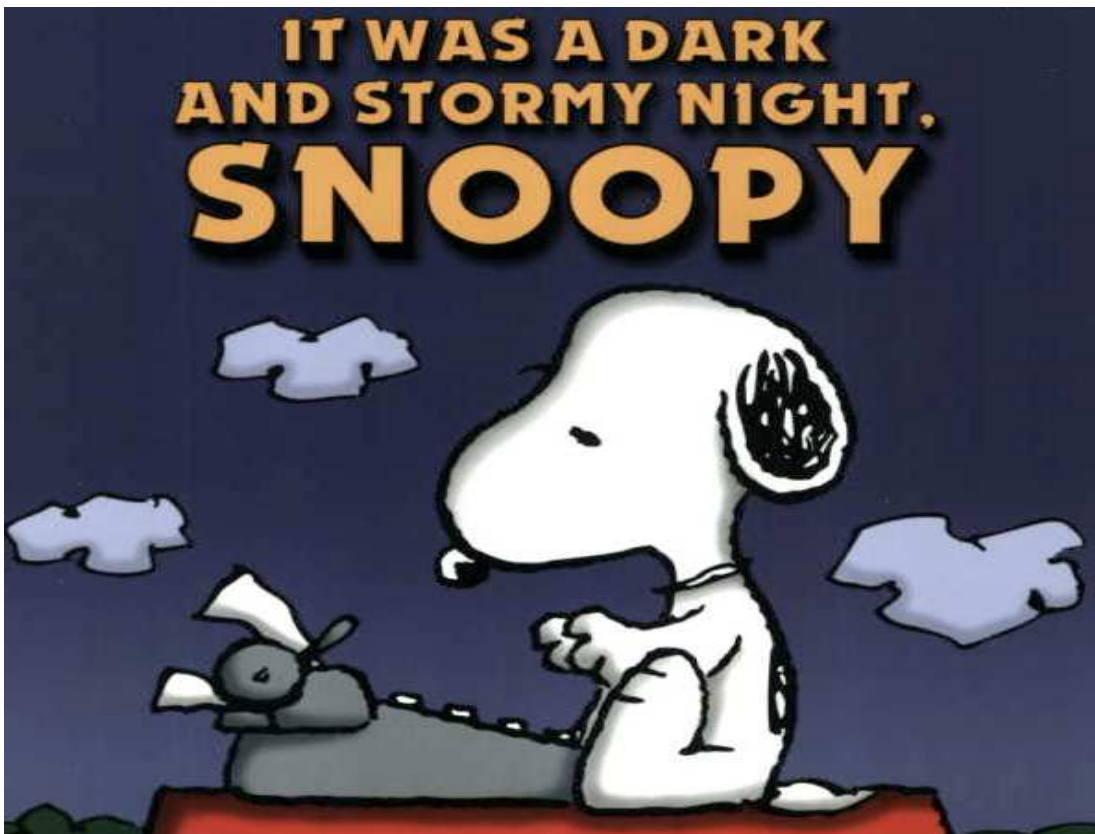
2.

3.



What does staff say about fundraising? :

- 1.
- 2.
- 3.



The big bucks
questions: How
are you currently
training your
board in
fundraising?

Ways to achieve this goal:

**Bring the board to
the mission**

**Bring the mission to
the board**



Make fundraising training a part of your annual board retreat!



What kind of
continuing education
is your staff getting in
fundraising?



Avoiding the “Amway School of Governance”

Board Commitment Letter

Attendance policy

Financial expectations

Committee assignment

Role in special events

Special events and
expectations

Send two copies, one for
board member, one for
office

Rough draft Board Commitment Letter

Dear _____

Thank you for agreeing to serve on the board of _____.

As I'm sure you know, our mission is:

Our vision is:

We expect the following of our board members:

Attendance policy: Our meetings are (list times, date and place) _____

We have the following financial expectations of our members: _____

Your participation in the following events is expected (auction participation, golf tournament, and other signature or educational events etc) _____.

We hope that you will consider including our organization in your will, as many of us have.

The length of your term is _____ We anticipate that it will take you approximately _____ hours (number of hours/week, month or year) minimum to serve on this board.

All board members are asked to serve on at least one committee. As we discuss, you will be on the _____ committee

To help with the orientation process and to welcome you, your board mentor (or sponsor) is _____ (include phone number)

Should you have any questions about being able to fulfill your duties, please call _____ (include phone)

Please sign the enclosed two copies, keep one and send the other in.

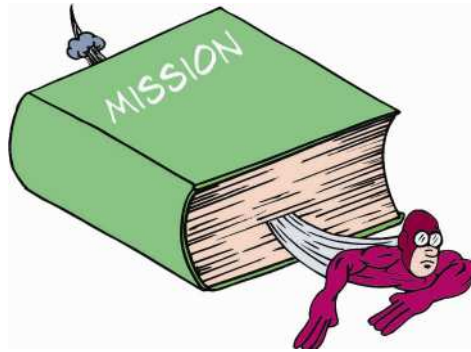
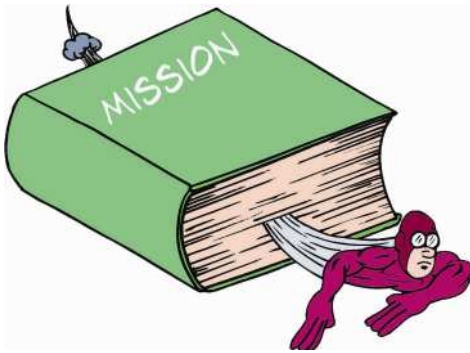
Welcome aboard. We look forward to working with you to help (once again refer to the mission)

Board Candidate

Chair of nominating or board

president or chair
date _____

Created by Carol Weisman, 2002 Reprinted with permission from "Secrets of Successful Fundraising"



Make fundraising a part of every board meeting by having a “mission moment,” celebrating a victory, sharing a need etc. Be deliberate.



Remember the checkers
versus chess school of
board management!

The three steps in fundraising:

1. Cultivation

2. The Ask

3. Stewardship



Web based cultivation

1. Sending a news clipping to friends, donors and supporters
2. Researching a potential donor
3. Looking for funding sources
4. Creating an e-zine or blog
5. Putting event photos on your web site
6. Writing informational articles for your web site
7. Writing e-books that can be sold

High touch cultivation

1. Invite a friend, relative or business associated to the agency
2. Have a meeting of a group you are involved in at the charity and organize a tour
3. Have an “at home” and have a rep from the organization tell the story
4. Initiate a lunch, dinner or other visit with a “closer” and a potential donor
5. Invite a potential donor to a special event

Mass Market Cultivation

Write an article for publication.

Don't forget the national media and the web based media.

Connect your organization with breaking news.

2. Go on the speaking circuit. Rotary, churches, temples, Junior League etc. NEVER leave without getting their contact info including e-mail address. Remember to ask for more than money...time, volunteers, clients.

The Ask

1. The folks who ask for money need to study the case and know how to overcome objections. There is a different rhythm to development than other sales processes.
2. Set up meetings with clients, friends and other potential donors with someone who can fill in pieces of the case that you don't know.

Mass Market Ask

1. Work with someone who knows the case and then close the sale at speaking events. Create a powerful tag-team approach. Tell your story and ask the audience to get involved.
2. This works in person, on video, can be on the web, sent to TV stations, DVD, shown by others at home events and in offices etc.

Stewardship

1. Thank people often, creatively, graciously and cheaply!
2. Research shows that 94% of all donors will give a second gift and a larger gift if thanked by a board member!
3. When you thank a donor, instead of asking for more money, consider for asking for more information and advice!



**Dr. Edie Zusman,
Neurosurgeon, Board Member**

Traditional Ways to Thank Folks

Hand written thank you notes

Phone calls

Lunches, dinners, thank you
events

Naming buildings, walls, rocks,
animals, plants, anything
that is nailed down or not
nailed down after the donor.

Remember, these are tried and
true and work on the
Millionaire next door!!!

Other Ways to get involved in stewardship:

1. Behind the scenes tour
2. Ask to be involved in a focus group (people love to give their opinion even more than money!)
3. With permission, publicize the gift with the media, internally, on your website.

Always,
always
always have
an on-going
wish list.

Have your wish list available:

In your newsletter

On-line

In your waiting room

In the newsletters of
contributors

In the holiday letters of
staff, board & volunteers

In hotels, restaurants

On the beach

In bathroom stalls.....

The Ability to Motivate

Mastering the Platinum
Rule...beyond the
Golden Rule



52 Ways to Motivate and Reward your Board and Volunteers

- When you have a new board member, send a press release to the local paper, business journal, alumni magazine, church or Temple bulletin and/or PR department of his or her corporation.**
- Create a “Member of the Moment” award for your annual meeting for quiet, behind the scenes leaders. Tiaras and crowns from a party store are always an elegant gift.**
- Surprise a particularly industrious board member by having the member’s car washed and detailed during a meeting.**
- Give new board members who have “seen the light” and joined your board, tiny flash lights for purse or pocket.**
- Start your board meetings with sharing celebrations of what is going well in your member’s personal, professional or volunteer lives.**
- Get a funny award, like an old bowling trophy, from a pawn shop, and pass it on to the board member who asks the best question.**
- Provide every board member with business cards for your organization. (To save money, have them printed by the sheet without the specific names and print them on your computer)**
- Create a Hall of Fame wall with photos of your board members.**
- Put your board members’ photos on your website.**
- Link your organization’s website to your board member’s website and ask them to do the same.**

More Ways....

Give a creative toy to celebrate great service such as a stuffed roadrunner or the Energizer Bunny.

Give all of your board members lottery tickets with the note, “Our clients or members don’t have to take a chance on their future with you on our board.”

Give your superstar a magnificent box of chocolates with the note, “I’ve gained so much from you, now it’s your turn,” or a heart healthy box of goodies with the note, “From my heart to yours.”

When a board member takes on a big committee assignment or agrees to chair a special event, present a folder with an engraved name plate with his or her name, the assignment or event and the year.

For your shining stars, present a certificate for one month of shoe-shines or a piece of jewelry with stars.

At the end of a long board meeting or retreat, hire a massage therapist to come to do chair massages.

Give a “Life Saver Award” for someone who helps out at the last minute. The award should be packs of Life Saver candies.

Use a wall chart to note the progress of a project, whether it’s getting new members, raising funds or serving more clients.

Send birthday cards to your board members. Better yet, call them and leave a message, even if they aren’t home.

Send an e-mail birthday greeting to your board member, reminding other board members to call or e-mail greetings.

More Ways....

At the end of a term or a long project or special event, write a thank you note to the board member's family noting the contribution and acknowledging the time away from the family.

On your board roster, list hobbies. This will give other members an opportunity to connect.

Have a "bright idea" award for the board members with the most innovative idea that they have also implemented. You might want to give a lamp or a year's supply of light bulbs.

At the end of a board member's term, don't just "whack them and plaque 'em", give them a final send off at a luncheon or breakfast in their honor. Share plans for future involvement.

Remember to celebrate holidays that are relevant to your mission. For instance, if you have a "new American's program" or deal with other immigrant issues, bring a client to talk about his/her experiences for the 4th of July.

For your annual meeting or board retreat, use Photoshop to put your board members photos on a Wheaties box. If you have a member with poor attendance and a really, really fabulous sense of humor, put his or her photo on a milk carton.

Provide logo wear that proudly displays your web address. On the back, list what you can do/learn on the site.

When beginning the strategic planning process, give everyone involved a calculator, ruler or abacus that says "Everyone counts when it comes to (then state your mission or organization's name)."

At your national convention, surprise a board member who has done a particularly fabulous job with a suite.

Create a "President's Award," which is given yearly by the board president to the member of the board or a volunteer who has done exemplary work.

More Ways....

Inaugurate an “ABCD” award (Above and Beyond The Call of Duty) which can be given anytime during the year.

Instead of the traditional gavel, give a conductor’s baton, magic wand or magic lamp to rub, to a new board chair.

Have a professional photo taken of a board member, get him or her to autograph it, and frame it for your wall of fame or executive’s office.

For the board member who is always putting out fires, buy and present him or her with a real fire fighter’s hat. Present several different hats to the board member who wears many hats.

Buy a toy sheriff’s badge for the development committee, and deputize them as fundraisers.

Provide a special parking space for new board members or board members who have taken on extra responsibilities.

Give board members newly released books or videos that are germane to your organization.

To build relationships and to become “a learning organization,” create a book or movie club that convenes before your meeting to keep current on issues affecting your clients.

Send a meal, pay for a house-cleaning, lawn mowing or snow removal service for a board member’s home during an illness or after a big project.

After meeting a goal, if your board meets in the morning, give your members a boutonniere to wear to work. It will serve as a conversation starter.

Before talking about fundraising, give every board members a \$100,000 Candy Bar or a Payday.

And a few additional ones...

- Give new volunteers and board members a coffee cup with your website and phone number. (Great also to give to funders and folks who refer clients)**
- Give board members post-it notes with your logo, phone number and website.**
- Create a pin or other logo-wear for multi-generational members of families who have served your organization.**
- Take photos of your volunteers and board members with their kids. Frame the photos as a thank you.**
- Bring a pizza or sandwiches to the staff for a communal lunch with the board. Ask each group to prepare a list of questions for discussion. Learn and enjoy!**
- After a walk or run event, give the chair and his/her committee certificates for pedicures. Have pedicures as part of a Happy Feet Debrief.**
- To celebrate an achievement, send an email message with an appropriate mp3 song as an attachment i.e. "She Works Hard for Her Money," "Taking Care if Business" or "The Hallelujah Chorus."**
- Create an on-line "Good News Gazette" where fundraising, membership goals or other victories are shared.**
- Raise the bar. Increase the goals and make specific plans to celebrate. Put your best party person in charge.**
- Give a board member an hourglass, watch or clock as thanks for the gift of his or her time.**
- After an event, have a volunteer of the year. Put a photo of that volunteer in your lobby and send a copy to the newspaper and to the volunteer's boss, spouse, parent and/or children.**

Resources for Training:



Available at
FundraisingSuperheroes.com

The National Association for Fundraising Professionals www.AFPNET.org

BoardSource) www.BoardSource.org

Carol Weisman, www.BoardBuilders.com, Carol@boardBuilders.com