



# Most Things You'd Like to Know about Fundraising

Part 5: It Takes More Than One Person:  
How To Engage Board/Volunteers In Fund Raising  
and How to Effectively Track Donors

Power Up Your Pantry, University of Missouri

New Chapter Coaching, LLC, Columbia, Missouri





# Housekeeping

- We are recording this!
- Please mute your mic and stay muted unless you would like to make a comment or ask a question at the end.
- Feel free to type questions into the chat box anytime.
  - We'll address these during the Q and A at the end.
- For those joining by phone, you can mute/unmute yourself by hitting “\*6.”

# Power Up Your Pantry

Power Up Your Pantry is a University of Missouri program intended for food pantries and other hunger relief groups looking for ways to enhance their current operations and better meet the needs of the people they serve.

Connect with us!

Website: [foodsecurity.missouri.edu/power-up/](http://foodsecurity.missouri.edu/power-up/)

Facebook: <https://www.facebook.com/powerupyourpantry/>



Interdisciplinary Center  
for Food Security



# New Chapter Coaching, LLC

Our mission is to build a better world by increasing the effectiveness of nonprofit leaders and the impact of the organization they serve.

Our core services:

- Leadership Coaching
- Strategic Planning
- Strengths-Based Team Building
- Leadership Roundtables
- Executive Transition Management
- Facilitation of Retreats & Meetings
- Organizational Capacity Building Assessments



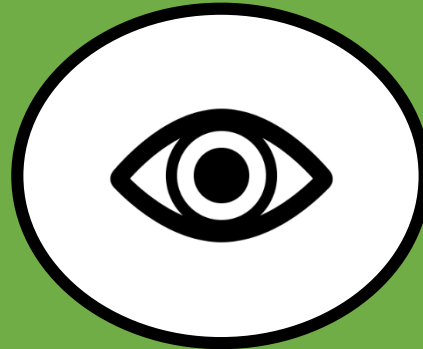
Jessica Macy  
Senior Associate



# What are our objectives?



**Determine the  
board's roles in  
raising money**



**Share methods  
and tools to  
increase success**



**Discuss how to  
track donors**





## Session One – What is Fundraising?

**What do you need to do fundraising?**

1. A reason – the mission
2. *A person – the asker / **prospective donor***

*Adapted from New Chapter Coaching Strategic Partner*

*Jaime Freidrichs*

# Session Two – Prospective Donors

## Constituency circles



Source: Hank Rosso - *Achieving Excellence in Fundraising*



## Session Three - Asking

To find donors, look for people who feel they have the **ability** to give and who **believe** in your organization. Then **connect** with them and ASK!

After you create a donor visit plan, gather documents or stories to support you and PRACTICE!





## Session Four – Written Word

- How to write a good fundraising letter
- There is a formula for writing a fundraising letter (just like a donor visit)
- How to thank donors
- Make the donors your hero!



## Session Five – Board Fundraising

Fundraising tops the list of board challenges.

**WHY?**

# Good News...

People join boards and volunteer because they care an awful lot!

Unless someone like you  
cares a whole awful lot,  
Nothing is going to get better.  
It's not.

—Dr. Seuss, *The Lorax*



# So – So News

Boards have to work ...  
no matter how big or how small, how rich  
or how poor, for better or worse





# Possibly Bad News ...

Fundraising is part of the work





# What is the board's over all role?

1. Represent Stakeholders
2. Provide Organizational, Legal, and Fiduciary Oversight
3. Set Strategic Organizational Direction
4. Ensure Appropriate Funding and Resources

# 10 ways to create a fundraising board

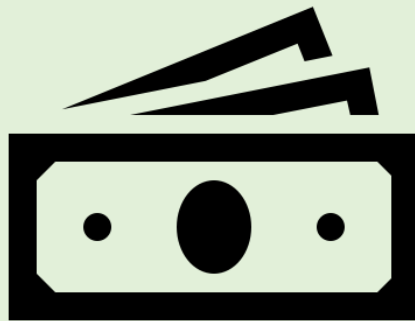
## 1. It all starts with recruitment

- Be clear up front with expectations
  - If they don't give why would others?
  - Create a culture of philanthropy in the entire organization





**Board members who give, can get...  
or GIT!**







# 10 ways to create a fundraising board

2. **Orientation** with responsibilities/job description
3. **Annual 1:1 Meetings**
4. **Contract/Agreement/Pledge** (sample to follow)
5. **Training-** practice at board meetings, send articles



## 10 ways to create a fundraising board

6. **Follow-Up** – with each other of staff
7. **Accountability** – set goals and measure progress, reports
8. **Recognition** – appreciation or work or gifts
9. **Personalization** - people give to people, this is personal!
10. **Transparency** – be honest about what you need & know



# Board Fundraising Responsibilities

1. Define or clarify the mission
2. Identify strong leadership – Staff and Volunteer
3. Approve adequate budgets
4. Plan for the future of the organization
5. Be familiar with the overall fundraising plan – or goal
6. Participate in the fundraising process

# Two steps to success

1

Make it clear

Make it easy

2

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



# Make it Clear

## Individual Responsibilities

- To be a visionary
  - see the future of the organization
- To be a donor
  - yep ...this is the part where you have to give
- To be an ambassador
  - Tell the story publicly

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## Make it Clear, continued

- To be support
  - Identify, evaluate, and cultivate prospects
  - Attend face-to-face solicitations
  - Write appeal letters
  - Organize and attend special events
  - Thank donors



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## XYZ Organization's Individual Board Member Responsibilities

- **Make an annual personal contribution, a “stretch” gift**
- **Raise at least \$5,000 from additional donors**
- **Attend our special fundraising events**
- **Be available to assist with other fundraising efforts**

Credit BoardSource

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## Make it EASY ...

- Present the contract/agreement/pledge to every new board member
- Select a board member to be in charge of distribution on an annual basis
- Give it to every board member
- Collect it
- Follow up!





## New Board Member Commitment to Serve Pledge

I, \_\_\_\_\_, recognizing the important responsibility I am undertaking in serving as a member of the Board of Directors of THE ORGANIZATION, hereby, personally pledge to carry out in a trustworthy and diligent manner all the duties and obligations inherent in my role as a member of the Board of Directors.

**My Role:** I acknowledge that my role is to contribute to: defining the organization's mission, governing the fulfillment of .... See sample **My Commitment:** I will exercise the duties and responsibilities of this office with integrity, collegiality and due care.

### I Pledge:

- To follow the Board of Directors Code of Ethics.
- To make attendance at all meetings of the board and committees which I serve, a high priority. And to come to meetings prepared to contribute to the discussion of issues and business to be addressed.
- To participate in strategic planning retreats, board self-evaluation programs, and board development workshops, seminars and other education events that enhance my skills as a board member.
- To recognize conflicts of interest between my position as a board member and my personal and professional life. If such a conflict does arise, I will declare that conflict before the board and refrain from voting on matters in which I have a conflict.
- To make a financial contribution under my name at least annually. I pledge to make a personal Financial Commitment of \$\_\_\_\_\_ for the year of \_\_\_\_\_.
- One-time payment in the month of \_\_\_\_\_
- Quarterly payments of \$ \_\_\_\_\_ or Monthly Payments of \$ \_\_\_\_\_

In addition to my personal gift, I will help the organization secure its needed contribution income by participating these activities: *(Please pick two)*

☐ I will work to secure a contribution from companies or businesses with which I am affiliated. I will make introductions to people and organizations in my personal circles of influence that may have the capacity to give by: (choose all that apply)

- { } Signing solicitation letters and or making phone calls
- { } Setting up opportunities for the Executive Director to interact with potential donors in person
- { } Hosting a “friendraising” event at my home or business\home\club
- { } Other: \_\_\_\_\_

☐ I will support Special Event by: (choose all that apply)

- { } Recruiting sponsors
- { } Selling XX tickets or donating \$XX
- { } Securing vendors
- { } Securing in-kind donors
- { } Volunteering my time my time the day of the event

☐ I will help THE ORGANIZATION get to know it supporters by making thank you call or personal notes to donors.

☐ I will volunteer \_\_\_\_\_ hours to direct service

☐ I will make an in-kind gift of \_\_\_\_\_ valued at \_\_\_\_\_

If, for any reason, I find myself unable to carry out the above duties, I agree to talk with the board development committee and, if need be, resign my position on the Board of Directors.

\_\_\_\_\_  
Board Member Signature

\_\_\_\_\_  
Date

## Why Board Members Should Give

- Establishes individual responsibility
- Inspires other funders to support
- Creates personal “ownership”



Well that was...



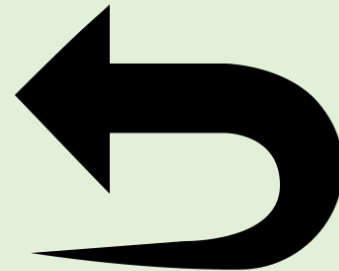


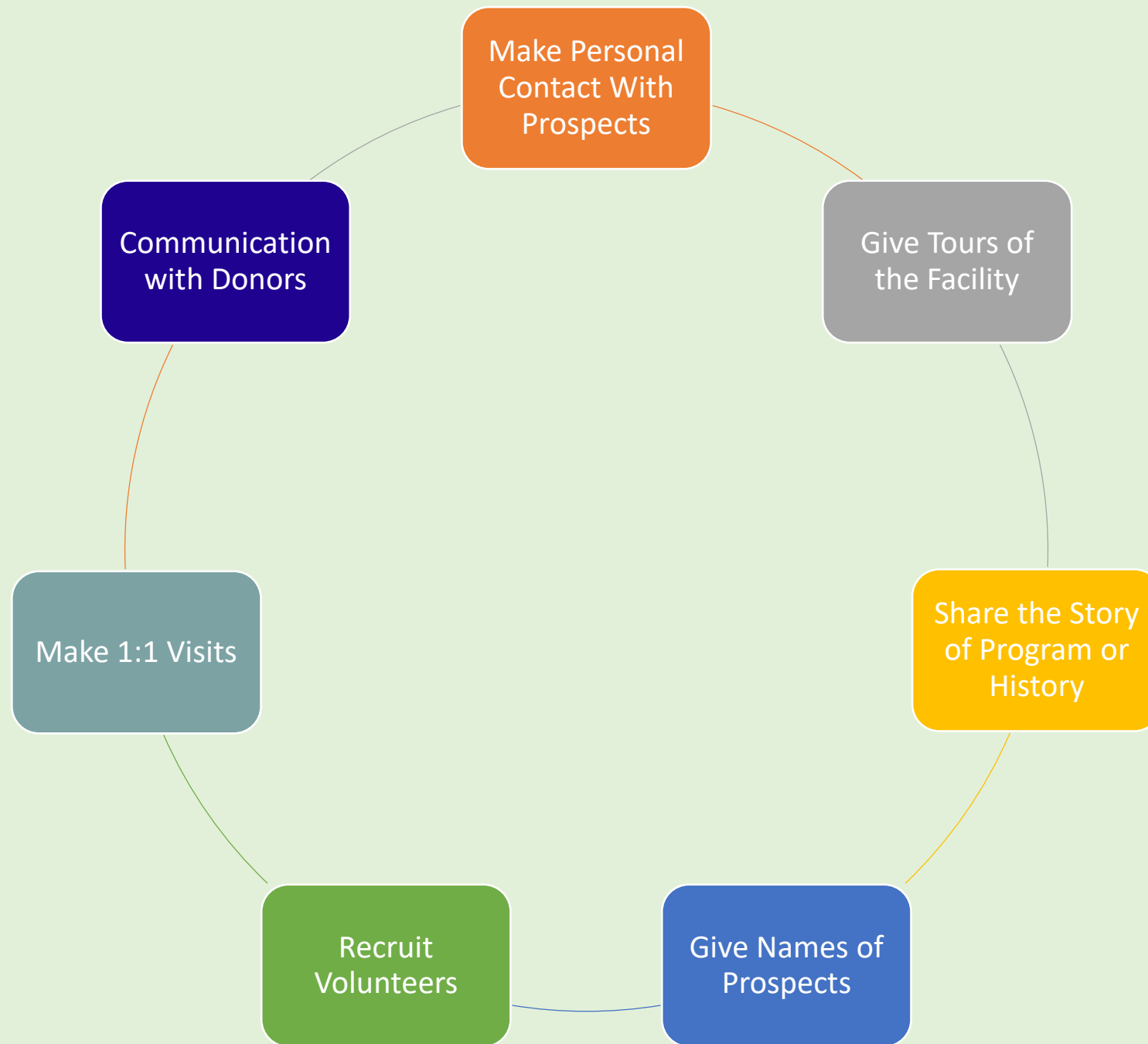
**Only 40 percent of CEOs surveyed in the 2016 *Leading with Intent* agreed or strongly agreed that their boards actively participate in fundraising.**



# Once they are giving...

- Determine the best asks
  - Who should they ask
  - How should they ask
  - What should they ask
  - Create a plan
- Circle back to the asking webinar #3
- Involve them in events
- Engage them in recognition







# The Fund Development Committee

oversees fundraising strategy and the board's fundraising activities by...

- ...working with staff to establish a strategic fundraising plan.
- ...engaging in fundraising activities.
- ...taking the lead in certain fundraising activities.
- ...being responsible for other board members' fundraising engagement...but it is not the special event committee

# Tracking donors



Just getting started...

A single sheet of old school 3x5 lined notecard is shown at an angle. It has a cream-colored background with light blue horizontal ruling. A red margin line is visible at the top. The text "Old school 3x5 notecards" is printed in black on the card.

Old school 3x5 notecards





## Just getting started...

- Use an Excel or Google spreadsheet
  - Not the best idea
  - It is not a database
  - Can get unruly – out of control fast

free downloads at Bloomerang or just Google it!



# What you need to track

- Name
  - Determine how you want to track names – I like lots of columns
- Address, City, State Zip
  - (put these in separate columns for mail merge purposes)
- Phone Number
- Email
- How much
- When
- Why



# Tracking Donors

- So many software packages and programs!
- I recommend something that is set up as a database.
- I have no opinion on the best!
  - <https://nonprofithub.org/volunteer-management/finding-right-donor-database-nonprofit/>
- Check out TechSoup
- Ask colleagues

# Fundraising secrets of success

To give donors the chance to change the world, you must:

1. Know the mission of the organization
2. Know what you are asking for
3. ASK – with planning!
4. Send thank yous and solicitation pieces.
5. Engage the board or volunteers



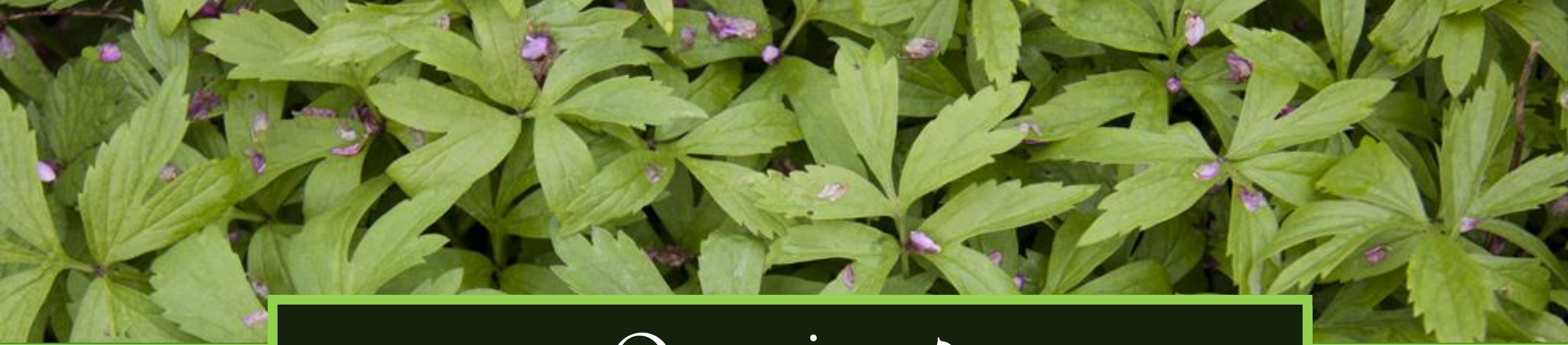
Words are powerful in more than just gratitude. They can help you raise money! STAY TUNED ...



# Resources

- BoardSource (website)
- Association of Fund Raising Professionals
- Council for Nonprofits (website)
- Joan Garry – joangarry.com (website, book, blog and podcast)
- Fired Up Fund Raising – Gail Perry (website and book)
- Nonprofithub.org





Questions?



## Next in our webinar series...

- Succession Planning for Food Pantries (April 10 at Noon)
- The Trauma-informed Pantry (April 24 at Noon)
- Volunteer Engagement (May 1 at Noon)

Register here:

<http://foodsecurity.missouri.edu/power-up-lunchbox-learning/>

# Thank you for joining us!

## GET INVOLVED



**LIKE** "POWER UP YOUR PANTRY" ON FACEBOOK.



**DOWNLOAD** "POWER UP YOUR PANTRY" GUIDE SHEETS  
FOR FREE AT: [FOODSECURITY.MISSOURI.EDU/POWER-UP/](https://foodsecurity.missouri.edu/power-up/)



**CONTACT US** FOR QUESTIONS OR INPUT. WE APPRECIATE  
THE FEEDBACK!

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Interdisciplinary Center  
for Food Security