

How to Build a Dynamic Donor Relations Team...

The Board

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Topics to be Discussed

- A culture of philanthropy
- How board members can set the example
- Board communication that shares the passion
- Board engagement in donor relations
- Experiencing mission moments
- Identifying donors and opening doors
- Making the 'ask'
- Providing support and encouragement to the board
- Donor Relations Checklist & Agreement Form



A Culture of Philanthropy

An environment where staff and the board move the organization's mission in a natural and cohesive partnership.

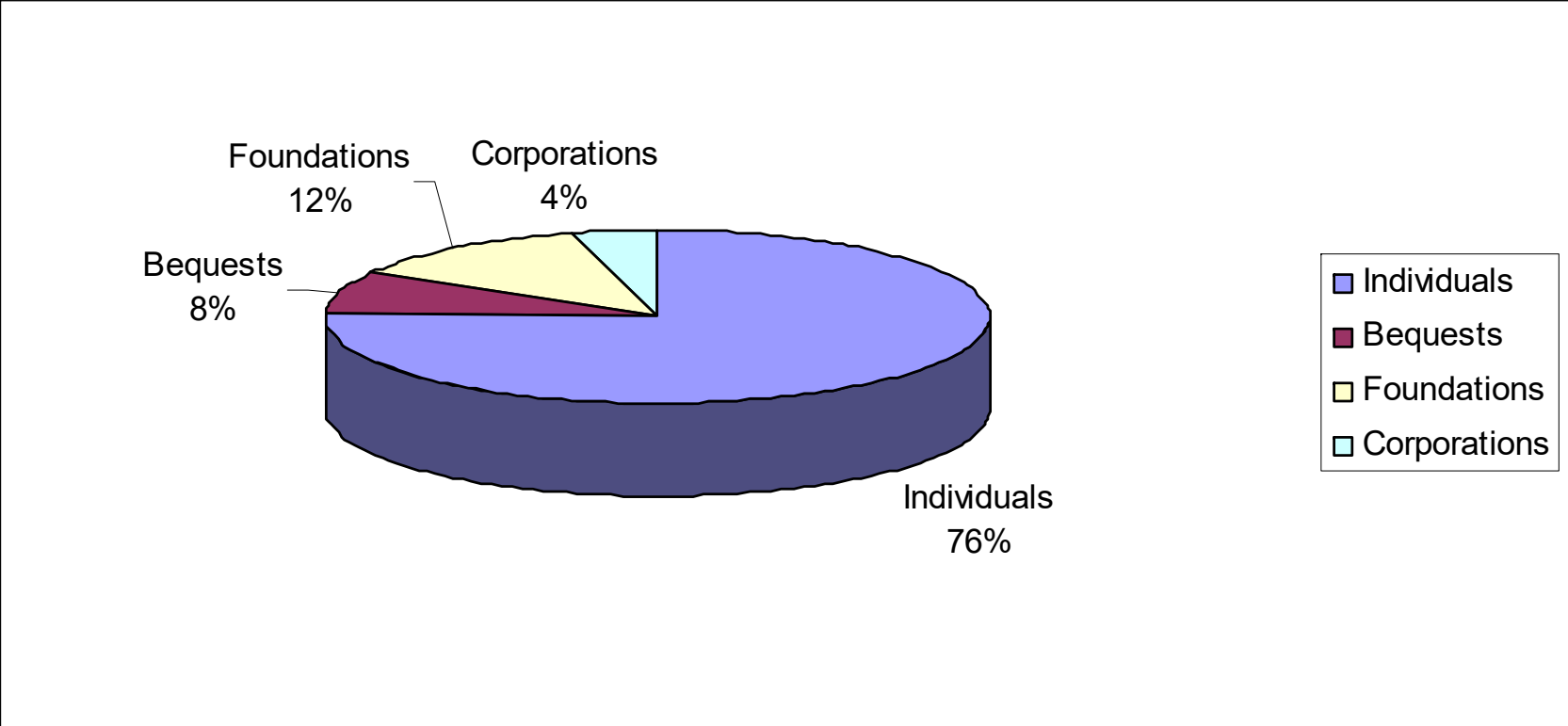


Fundraising – (noun) The raising of assets and resources from various sources for the support of an organization or a specific project.

- *The Association of Fundraising Professionals Fundraising Dictionary Online*

Sources of Private Contributions

Giving USA 2016





What is a board member's overarching task in fostering fund development?

To set the example through strategic actions that support the organization's mission

Why is setting the example important?...

- Board members have a moral duty to support the organization, especially financially.
- If board members don't support the organization, then why should anybody else?
- The gift they make must be meaningful and one they are proud of.

Setting the example...

- The importance of board giving is rarely explained, rather their giving is often apologized for.
- Encourage public and private conversations with board members about giving that is open and honest.
- Ask the board chair to help foster this message.

Setting the example...

- State the expectations in both written and spoken form. (we'll review samples later).
- Include board members in the development of the expectations.
- All organization leaders must talk continuously about the topic of giving (their own & others).
- Include such documents and conversation in the board recruitment process.

Ask the board to say 'thank you'

- An easy and joyful job for the board, and one that pays big dividends.
- Thanking donors brings them closer to your organization.
- When donors feel connected, they keep giving.
- Let's look at some strategies to encourage long-term donor relations...

1. Communicate with donors and share the passion

- Board members should consider themselves Ambassadors for the organization.
- Board members should develop their own 'message', with assistance from staff to tell their story.
- Board members need data that will pique the interest of a potential donor.
- Staff should provide education to boards with continuous messaging.

2. Engage the board in discussions about 'What' to say

- Discuss:
 - What IS going on at the organization?
 - What ARE the biggest challenges facing the organization?
 - How MUCH does it cost to help one person?
 - What IS being addressed this year?
 - What are the plans for growth, if any?
- Consider devoting an upcoming board meeting to a full discussion of these topics.

3. Experience some mission moments

What is a mission moment?

- A chance to experience an organization's work with a direct or personal experience:
 - “You won't believe what I saw last night . . .”
 - “Did you know that there are people in our community who...?”
 - “I can't imagine a situation like. . .”
 - “I am so amazed that . . .”

Cancel your next board meeting and take the board on a
FIELD TRIP instead.



4. Opening the doors

Nonprofits will benefit from board members who “open doors”, but how do we get them to do this?

Here are four steps that will help achieve this goal....

Four steps to help your board open doors to donors

1. Work with board members on how to communicate with donors in partnership with leadership.
 - Though it has to be their OWN PERSONAL STORY of why they care.
2. Create contagious energy by removing the fear of soliciting.
 - Board members may simply ‘share the passion’ to be excited enough to support the organization’s mission.
3. Create a conversation.
 - It’s always about the donor. Talk about the donor’s interest in the cause and/or ask their advice.
4. Invitation to follow-up for a next step.
 - Host a tour, informational breakfast, or coffee.

5. When appropriate, a board member may help make the 'ask'

- Give board members who ARE good at making the 'ask' the opportunity to do the asking.
- If the board member is the 'key holder' to the relationship, they must be involved in the asking process.
- Make sure the board member has accurate organization and donor information prior to the 'ask'.

6. Support and encourage all fund development activities...especially events

- Board members must be engaged in, and supportive of all fund development activities and strategies.
- Their attendance at organization events is a must...and they should invite others to the events.
- Assign board members specific individuals to thank at events.
- When board members understand that fund development moves the mission, the dots get connected.



Board Member Donor Relations
Checklist
&
Board Member Agreement Form

In Review

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THANK YOU!

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