



RAISE THE WORK

Metro Toronto Convention Centre
NOVEMBER 25-27, 2019

Activating Your Board in Fund Development

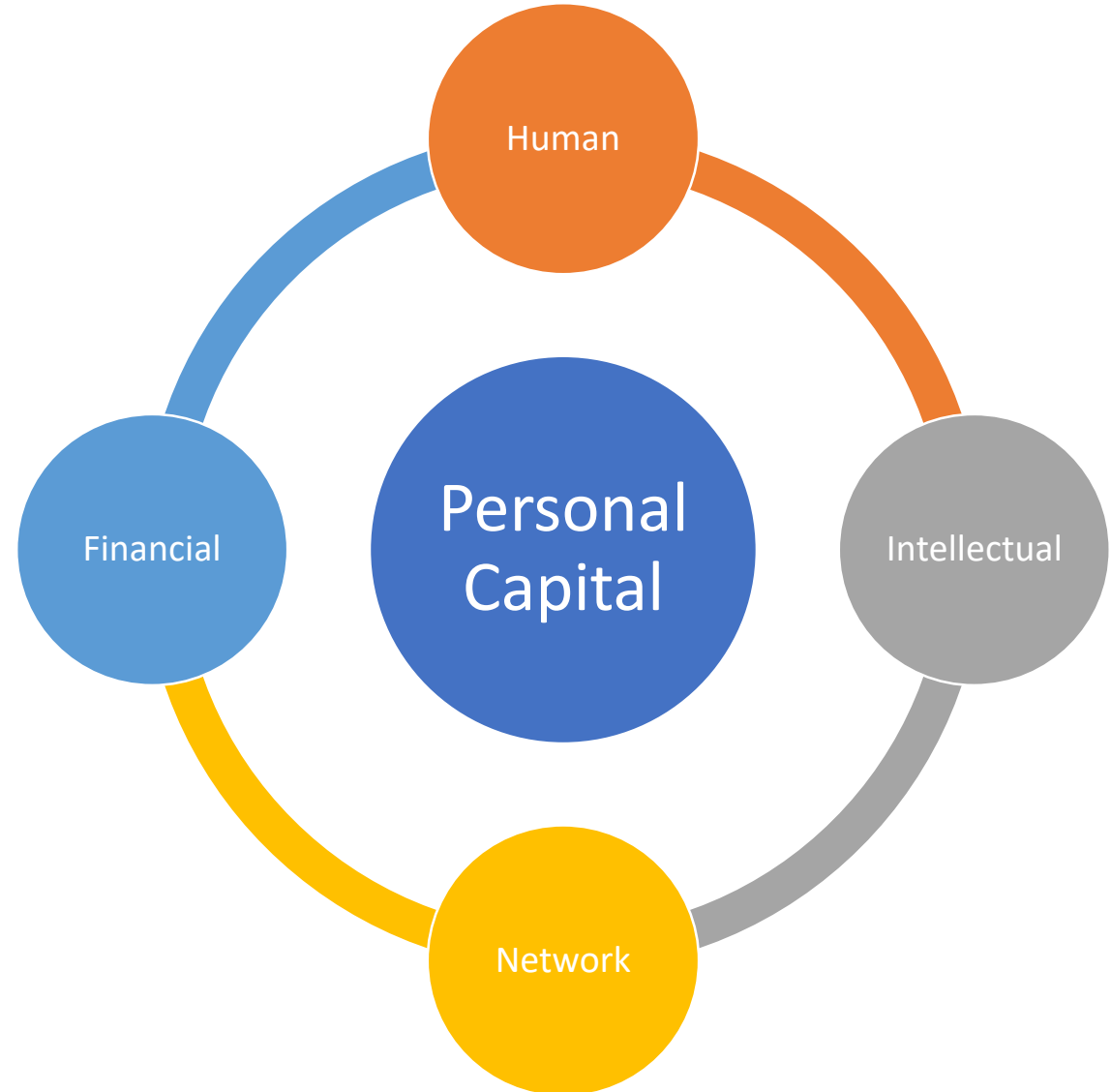
Laurel McCombs
Senior Philanthropy Advisor

AND not OR

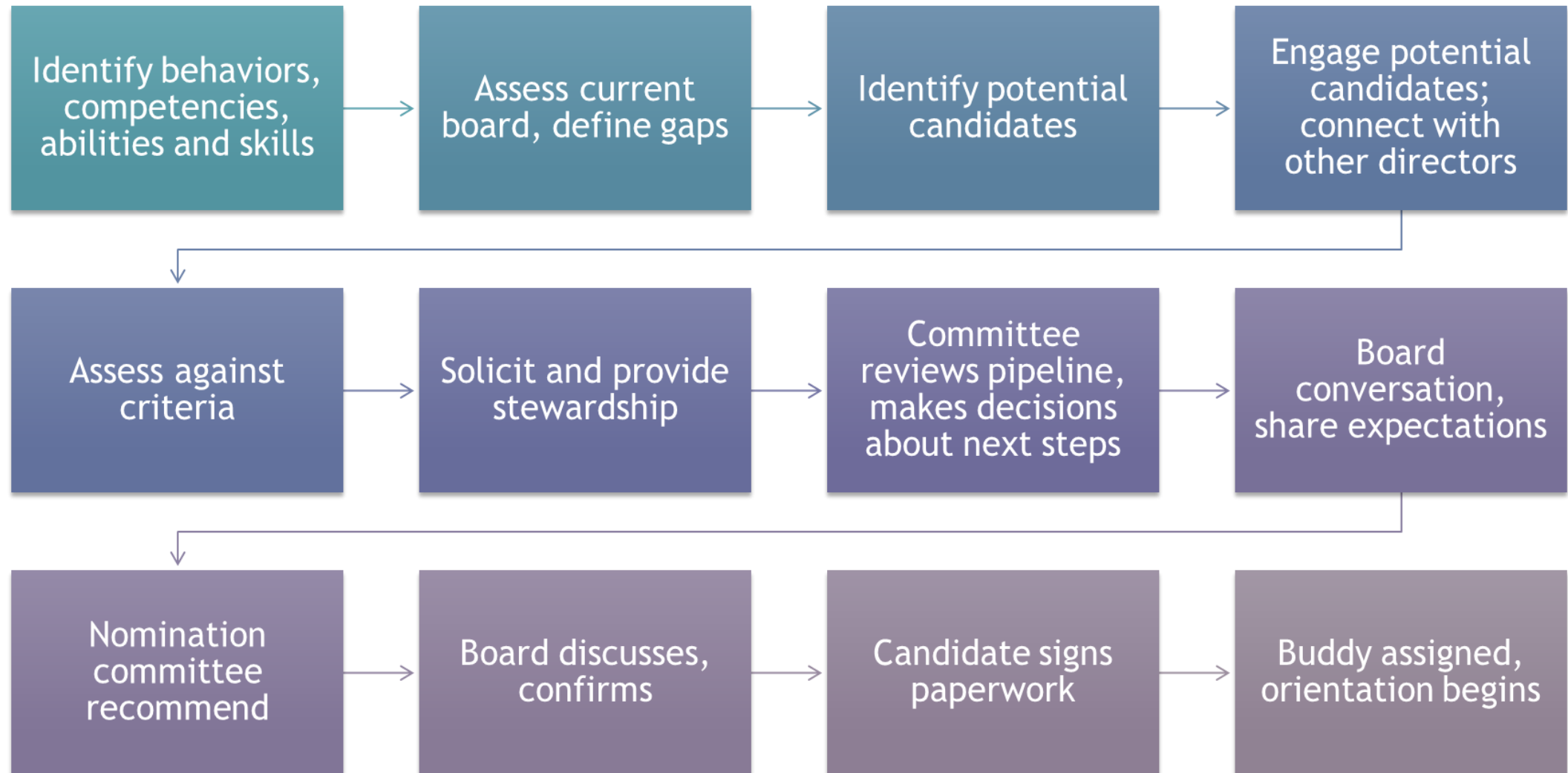


Being “All In”*

**Ernie Ludy, Founder Medstat*



Board Recruitment Process ©

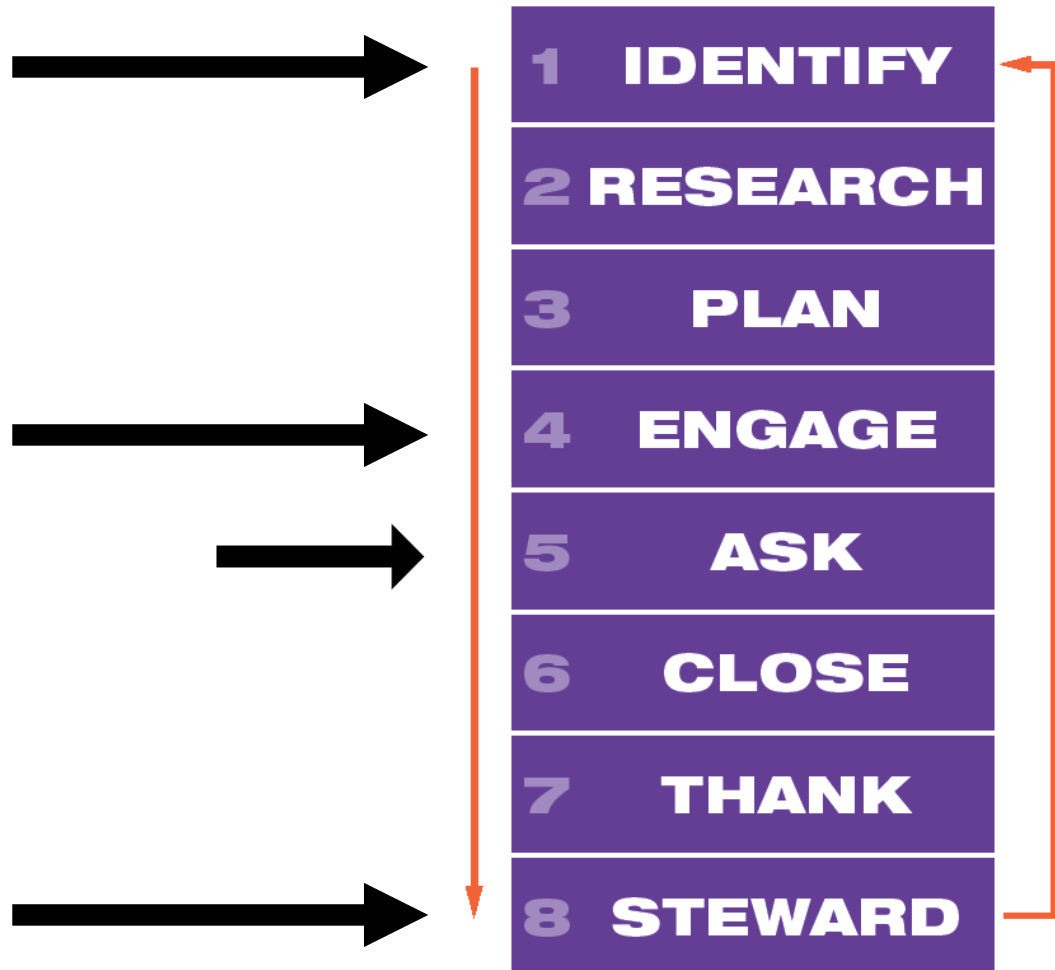


Inspired, Joyful, Generous Investors



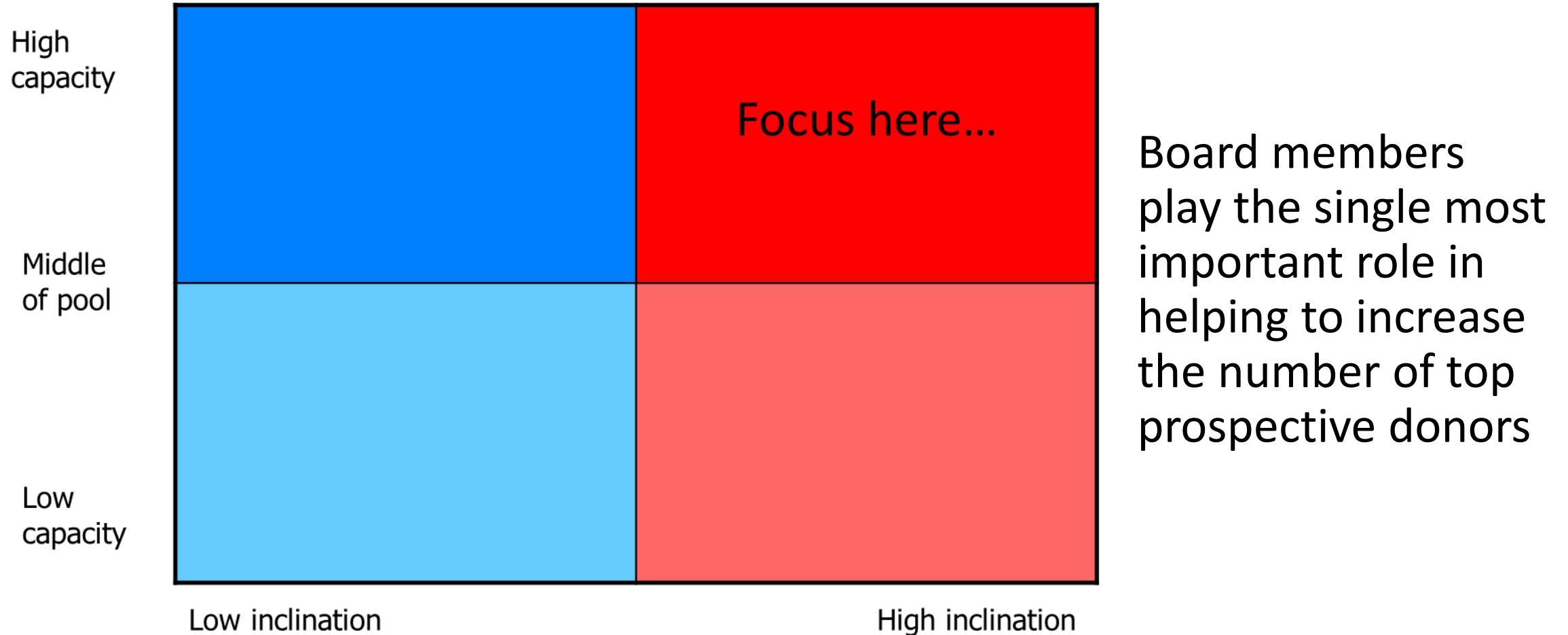
There is no “I” in Board Development





Board Roles in
Fund
Development

It Begins with Identification



Filling the Pipeline

Current and
past donors

Current and
past board
members

Current and
former staff

Current &
former Bigs

Program
Partners

Event
Participants

Your Network
of Contacts

Families of
Service
Recipients

Former Littles

Vendors

Community
Members

Who Else?

Identification Actions for the Board



Be available to share the BBBS story – practice articulating the BBBS vision with passion!



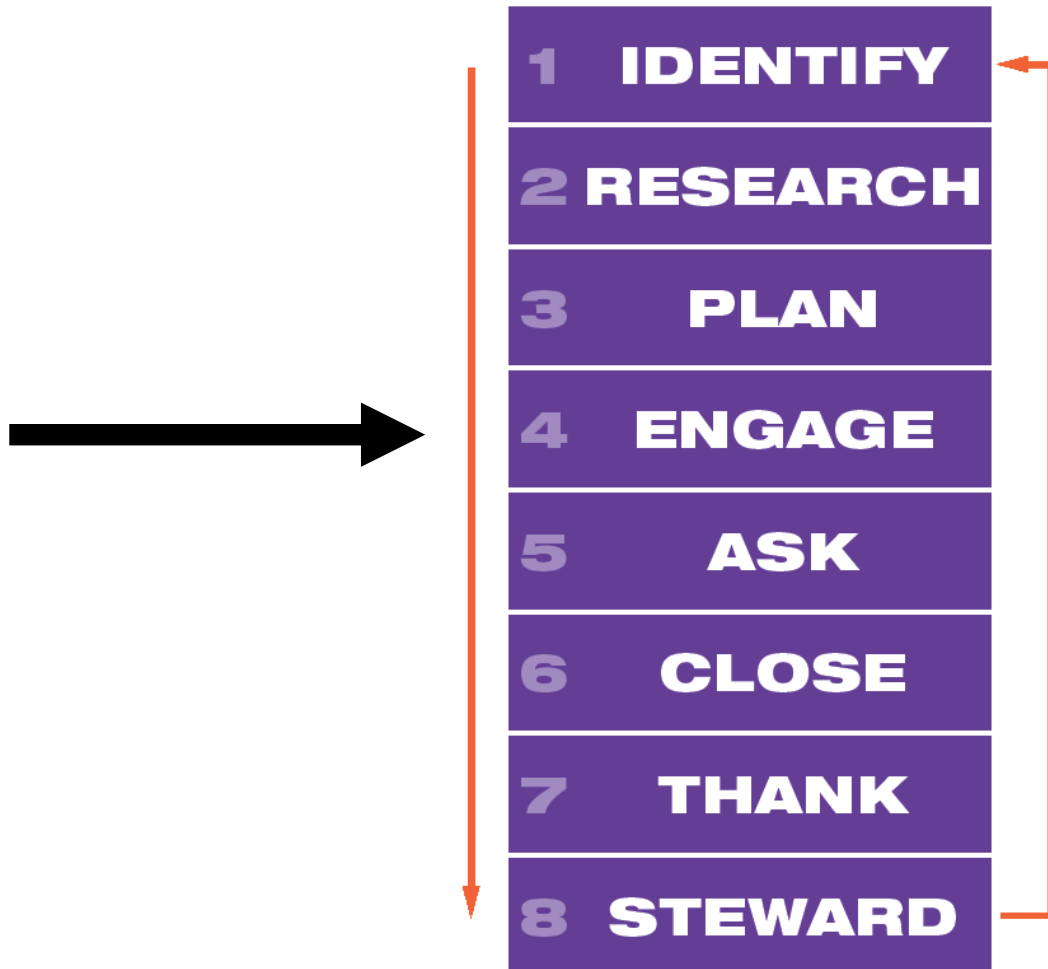
Actively participate in reviewing names from the current pipeline of prospects/donors



Open doors and make introductions – ask others they know to get involved



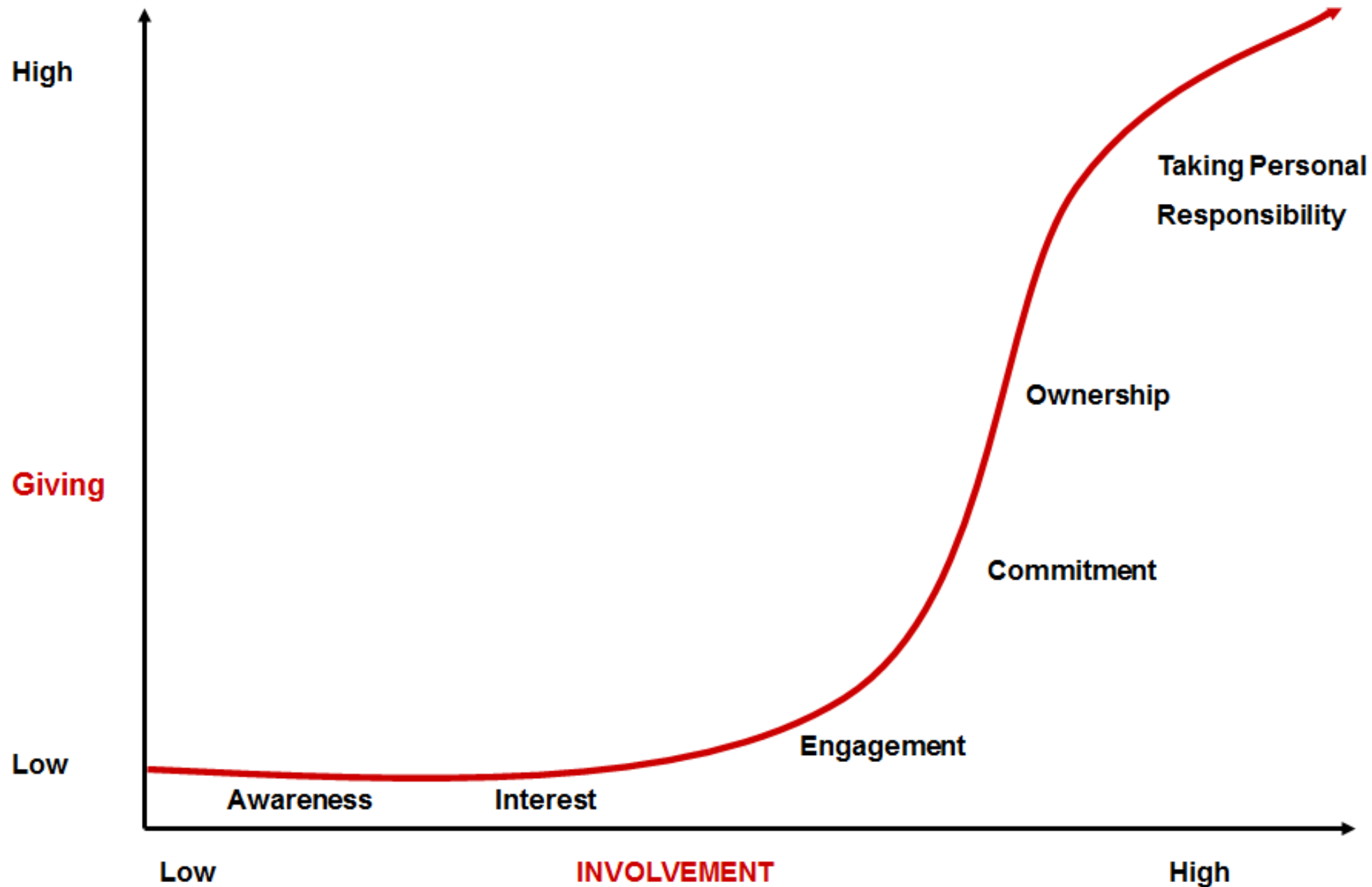
Build long-term relationships with BBBS and own network, not just yourself



Engaging &
Building
Relationships

The Tarnside Curve of Involvement

**Tarnside
Consultancy, UK*



Solving the Donor Puzzle©

- Capacity to give
- Philanthropic motivations, values, and interests
- List of philanthropies and why
- Expectations
- Engagement and stewardship preferences
- Affinity with, knowledge of, cause (organization)
- Decision makers and process
- Profile of other decision makers
- Natural partners and connections
- Personal capital
- Potential issues

Engagement Actions for the Board



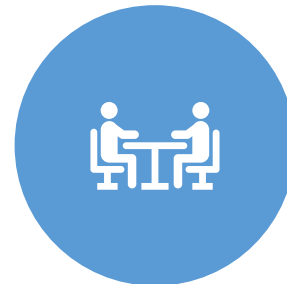
Be available to meet with prospective donors and share personal stories and passion



Host Vision Meetings

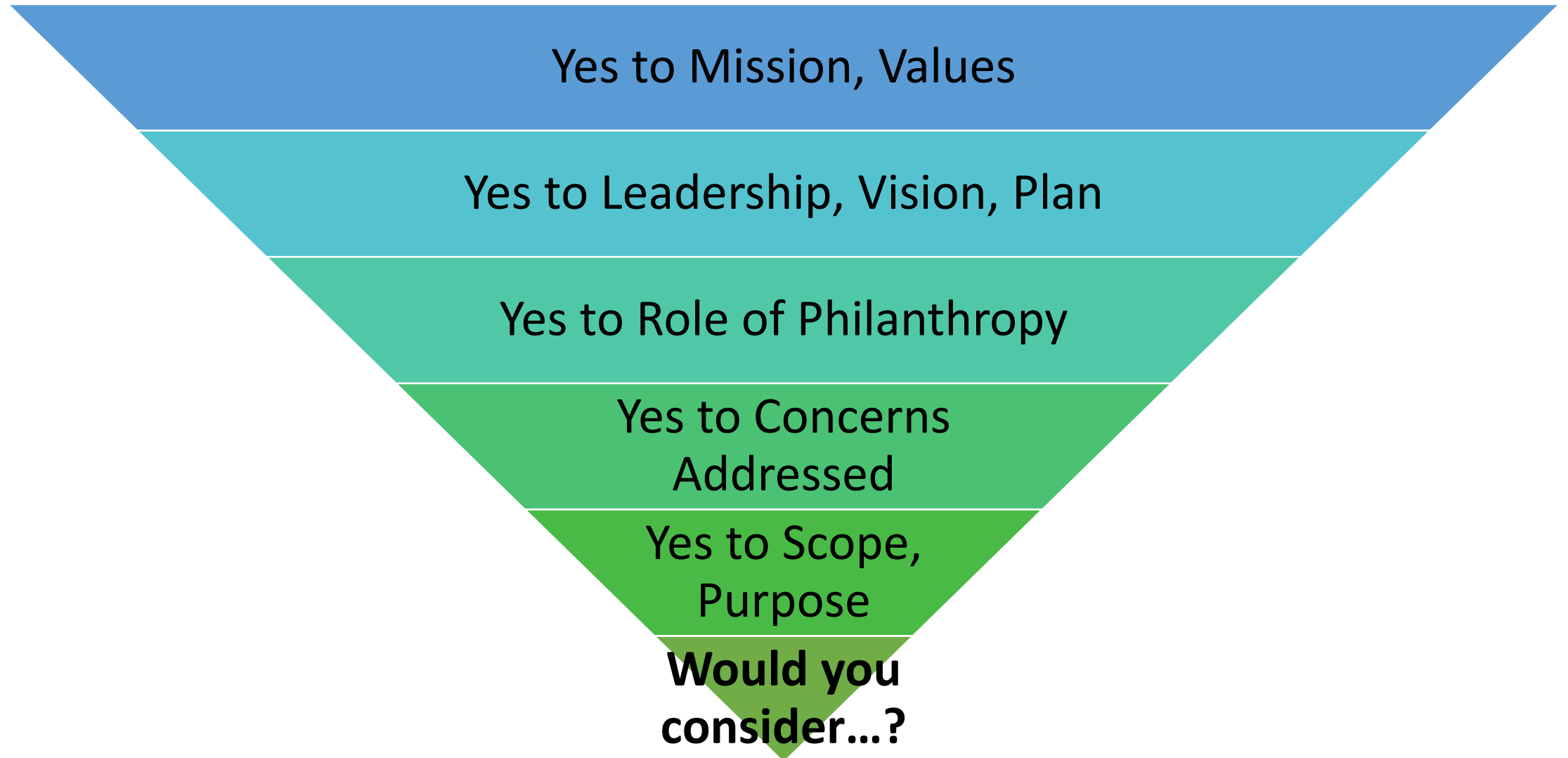


Support planning & development of engagement opportunities



Be a willing board teammate in engagement activities

Making an Effective Ask



Stewardship: Last but Not Least!



Accountability

Spending as agreed

Documenting
Accurately

Managing Finances
Wisely



Acknowledgment

Within 24-72 Hours

Reiterating “The
Promise”



Recognition

In a way that is
appropriate and
personally meaningful



Stewardship

Demonstrating the
significance & impact
of the gift.

Providing JOY!

From Thank You to Impact

- Top donors hear from appropriate people
- Board involvement with Critical Few
- Are your touches the “right” ones?

95%

Would appreciate a thank you call within a day or two of the organization receiving their donation

85%

Said such a thank you would influence them to give again

84%

Said they would definitely or probably give a larger gift

42%

Average amount of increase in giving by those that received a thank you call compared to similar donors who did not (tracked after 14 months)

39%

During the renewal cycle, those who received a thank you call were 39% more like to renew their support

**Penelope Burk, Donor Centered Fundraising*

Board Stewardship Actions



BE INVOLVED IN
BRAINSTORMING AND
DEVELOPING
STEWARDSHIP
ACTIVITIES



HELP CREATE “WOW”
EXPERIENCES FOR
DONORS



SAY THANK YOU:
HANDWRITTEN NOTES,
PHONE CALLS, EVENTS,
FACE-TO-FACE



DELIVER STEWARDSHIP
“MOVES” TO
APPROPRIATE DONORS

Goal Setting

Board Team Goals

- Giving Goal: Total \$ or % of Philanthropic Goal
- Fundraising Goal: Total \$ or \$ of Philanthropic Goal
- Identification Goals: Total # Identified
- Engagement Goals: Total # of Engagement Activities / # of Vision Meetings
- Stewardship Goals: Total # of Stewardship Activities (Touches)

Individual Board Member Goals

- Giving Goal: Personally meaningful gift
- Fundraising Goal: Total \$ through agreed upon categories
- Identification Goals: # Identified
- Engagement Goals: # of Engagement Activities / # of Vision Meetings
- Stewardship Goals: # of Stewardship Activities (Touches)

Implementation & Follow-Up

- Develop a written plan
- Assign roles & responsibilities
 - Build a team where everyone can be successful!
- Create deadlines and identify key milestones/checkpoints
- Identify gaps in knowledge & comfort levels
 - Create training & support opportunities to address
- Have clear expectations & follow through

Thank You!

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