

# Board and Staff Roles in Fundraising

Alliance for the Chesapeake Bay  
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# Two Fundraising Absolutes

In order to raise money, someone from your organization must ask for it

Once you receive a gift (of any size) you must thank the donor

# Today's Session

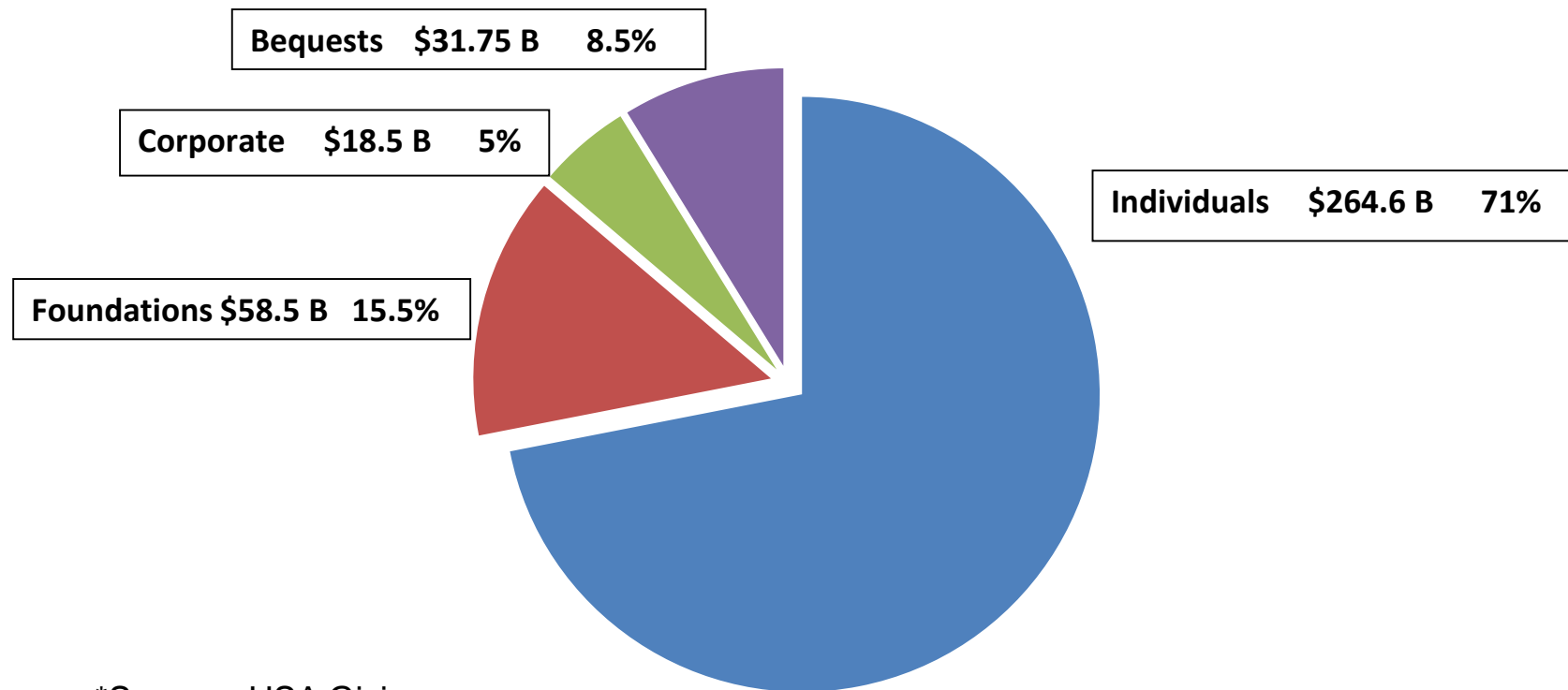
- Basic fundraising principles and stats
- The role of Board and staff in implementing the Fundraising Plan
- Specific fundraising tasks

# Fundraising Statistics

- Typically 10% of the donors give 60% of the total donations.
- An average NFP retains approximately 85% of its donors/year.
- If a donor responds to a letter with a \$100 gift, a phone call may reap \$300 and a face-to-face ask may result in a \$1000 gift.
- The more you ask, the more you get – 3(4) to 1 ratio
- The larger the gift, the longer it takes to get.
- 89% of US households give to charity.

# Sources of Contributions

## 2015 Contributions: \$373.25 Billion by source of contribution



\*Source: USA Giving

# Fundraising is Relationship Building

“People give to people”

Successful fundraising goes hand-in-hand  
with building relationships with  
prospective donors

# Fundraising is Relationship Building

“People give to people”

Identify – Inform – Interest – Involve



**Invest**

# Why People Give

- They are inherently generous
- They want to make a difference
- To share a joy or loss
- To be a part of a community or organization
- To receive peer approval and recognition
- To gain tax and financial planning benefits
- **They are specifically asked**



# Why People Do Not Give

- They don't see how their donation will make a difference
- They received no personalized appeal
- A past gift went unacknowledged
- Timing wasn't right
- Org's mission wasn't compelling for them
- **They weren't asked**

# The Planning Continuum

Strategic Planning



Annual Work Plan



Annual Budget

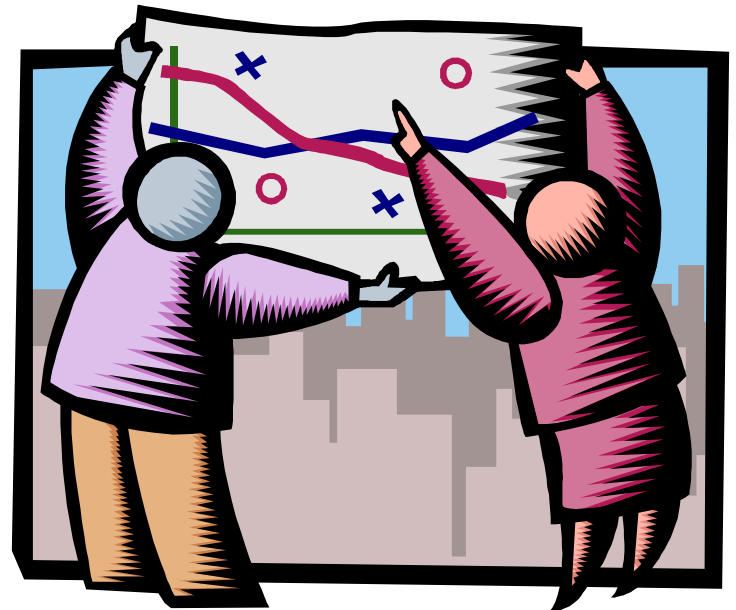


**Annual Fundraising Plan**

# The Fundraising Plan

## Strategies

- Goals - \$, #, %
- Target Audience
- Action Steps
- Timeline
- Cost
- **Responsible Person(s)**



# What kind of money to raise

**A balance of:**

restricted funds - programmatic  
&  
unrestricted funds - general operation

# Who raises the unrestricted funds?

The members of the Board

Assisted by

- Development Committee
- Staff
- Other volunteers
- Consultant


# The Development Committee

(also called Fundraising or Advancement Committee)

... is responsible for ensuring the implementation of the Board-approved fundraising plan with the help of staff and all Board members

Made up of Board members and ex-officio staff

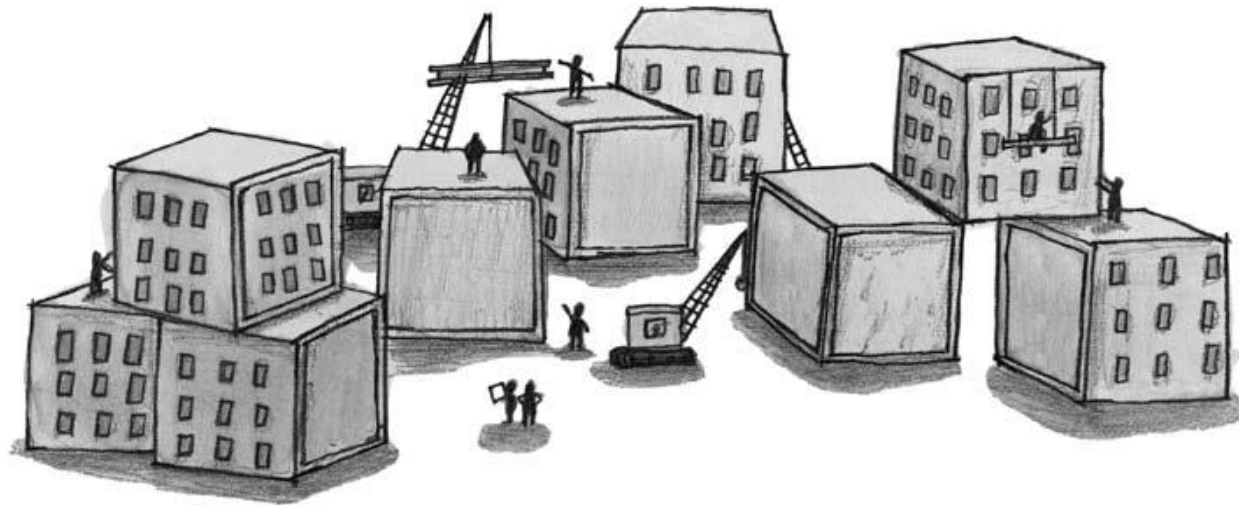




**“I’ll do anything,  
but ask for money.”**

**What are the roles of the Board and staff in fundraising?**

**What is the “something” that each Board member can do for the fundraising effort?**





# Many Board members are ...

- unaware of their fundraising responsibilities
- unsure how to proceed, or
- lacking in fundraising skills.

# The Board's Role in Fundraising

- Active engagement in the fundraising plan
- Leading/supporting the various strategies
- An annual financial donation

# Lead/Support Roles

FUNDRAISING STRATEGY	LEAD	SUPPORT
Board Giving		
Grants		
Membership		
Small Individual Giving		
Major Individual Giving		
Corporate		
Events		
Workplace Giving		

# Lead/Support Roles

FUNDRAISING STRATEGY	LEAD	SUPPORT
Board Giving	Board	Staff
Grants	Staff	Board
Membership	Staff	Board
Small Individual Giving	Staff	Board
Major Individual Giving	Board	Staff
Corporate	Board/Staff	Board/Staff
Events	Board/Staff	Board/Staff
Workplace Giving	Staff	Board

# Fundraising is broken down into four tasks

Identification

Cultivation

Solicitation

Stewardship

# Identification

Finding and gathering information  
about potential donors

examples of how you can participate in this  
fundraising task

# ABCs of Identifying Prospects

**A** – Ability to give

**B** – Belief in your cause

**C** – Connection to your org

# Cultivation

The process of generating interest and involvement  
in potential donors  
– building the relationship

examples of how you can participate in this  
fundraising task



# Solicitation

The process of asking for  
financial support

# Stewardship

Thanking and  
maintaining good relations with donors

examples of how you can participate in this  
fundraising task

# All Board members engage in ...

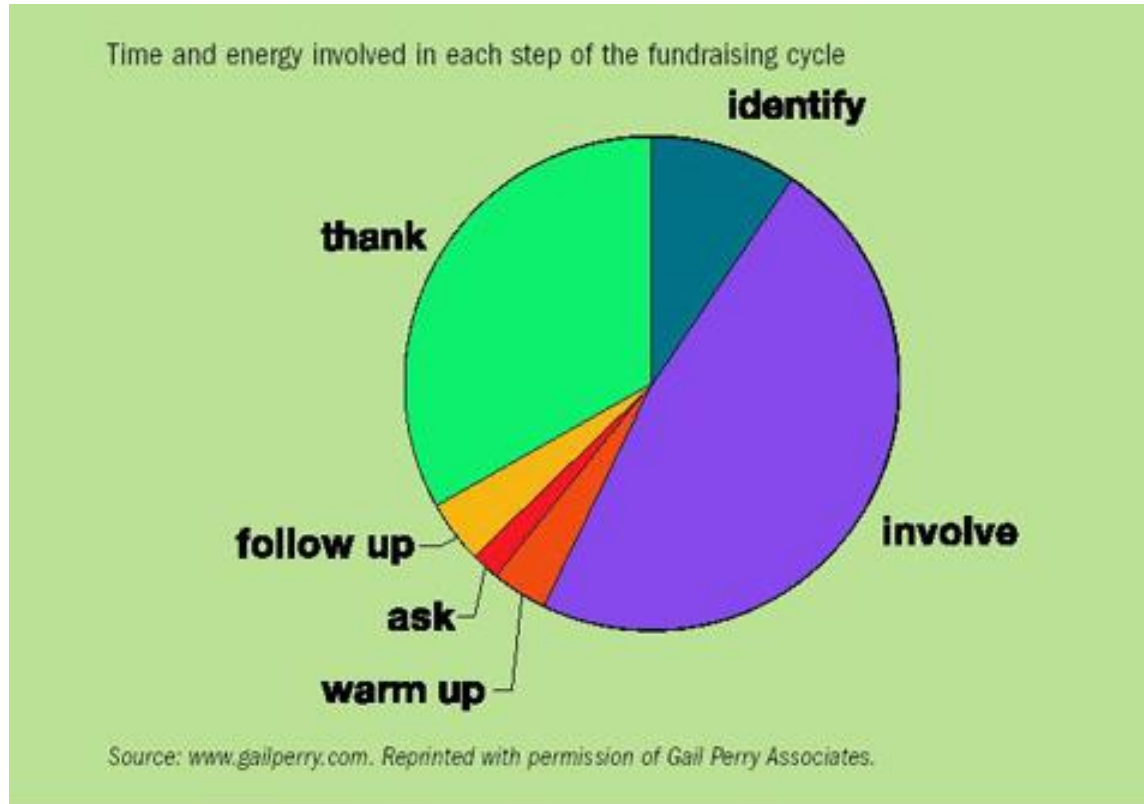
→ Identification

→ Cultivation

Solicitation

→ Stewardship

# The Fundraising Process (time and energy)



Source: [www.gailperry.com](http://www.gailperry.com). Reprinted with permission of Gail Perry Associates

# Other Fundraising Tasks

- Make a financial pledge/donation annually
- Offer input and approve the fundraising plan
- Donate/acquire an in-kind gift or prizes for raffles/auctions
- Participate in making calls to lapsed donors/members
- Recruit new members or give membership as a birthday/holiday gift
- Identify potential Board/committee candidates whose skills would serve the fundraising effort

# Board Commitment Form

Two elements – personal gift and actions

## **SAMPLE Board Member's Fundraising Commitment Form**

My personal gift will be \$ \_\_\_\_\_.

(Indicate payment(s) to be made – monthly, quarterly, lump sum, etc)

I will be in involved in the fundraising effort in the following ways:

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I, \_\_\_\_\_, will help raise \$ \_\_\_\_\_.

# Fundraising Evaluation - Dashboards

**Evaluate throughout the year** – report at Board meetings and staff meetings

- The whole effort
- Individual strategies

Adjust the fundraising effort as needed

**Dashboards** – visual renderings; one for each of the major streams of income; grids, pie charts, etc

# Individuals dashboard

January 1 – February 28, 2015

DONOR TYPE	# 2013	# 2014	# 2015
Major (\$10k+)	1	2	Goal: 3 Actual: 1
Middle (\$1k-\$10k)	10	15	Goal: 20 Actual: 5
Minor (under \$1k)	100	125	Goal: 150 Actual: 50
<b>Total raised actual</b>	\$\$\$	\$\$\$	\$\$\$
<b>Initial budgeted</b>	\$\$\$	\$\$\$	\$\$\$



# Common Fundraising Mistakes

- Too much asking for money, not enough relationship building
- Sending Board members on “cold” asks
- Not using staff and Board strategically
- Crisis fundraising
- Lack of training/support

# In summary ...

- Integrate the fundraising plan into the whole organization
- Provide the infrastructure to support the effort
- Ensure a feasible pace; a feasible work load
- Provide active roles for each Board member that build confidence and are more than just asking
- Evaluate progress on a regular basis



**A nonprofit organization is hurt more  
by those  
who would have said “yes”  
but were never asked,  
than by those who were asked  
and said “no”.**



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