WORKSHOP

Health Center Boards: Advancing Our Confidence in Ambassadorship & Fundraising

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TRAINING AGENDA

1. What inspires people to give?
2. Current giving trends
3. 5 Steps to fundraising
4. Making the “Ask”
5. Recommendations for success

WHAT INSPIRES YOU TO GIVE?
GIVING TRENDS

TOTAL GIVING 2006 - 2011

Source: Giving USA 2012

2012 TRENDS IN NON-GOVERNMENTAL GIVING

Source: Giving USA 2012
2012 TRENDS IN NON-GOVERNMENTAL GIVING

Giving to Religion
Giving to Education
Giving to Human Services
Giving to Health
Giving to Public Society Benefit

5 STEPS TO FUNDRAISING WITH THE BOARD

STEP 1: EMBRACING AMBASSADORSHIP
STEP 2: UNDERSTANDING DEVELOPMENT
STEP 3: IDENTIFYING FUNDING NEEDS
STEP 4: CLARIFYING THE BOARD’S ROLE
STEP 5: MAKE THE ASK

STEP ONE
EMBRACING AMBASSADORSHIP
AMBAASSADORSHIP STARTS WITH… Orientation!
You have 60 days from the time that a person joins your board to:
• Educate on Programs & Services
• Provide Historical Data
• Inspire!

EFFECTIVE AMBASSADOR TEST
In 30 seconds, write down all of the people who know you serve on the board, excluding other board members and your family.
How many did you get?

COMMUNICATION
Case for support
Strong brand
Printed material
Unified message
Compelling stories
Staff Must Provide These Tools To The Board - Board Chair & Development Committee must support culture
PROMOTE AMBASSADORSHIP

Thank-you calls (29% return in same year)
Lapel pins
Business cards for board members
Commit to attending 4 events/year in community
Use your social networks
Best ambassadors should serve on Development Committee

STEP TWO

UNDERSTANDING DEVELOPMENT

FUNDRAISING VEHICLES

Acquisition or Renewal Giving
- Mail/email
- Internet/online
- Payroll campaign

Major Gift Giving
- Major gift prospects
- Board members

Institutional giving
- Foundations
- Corporations
- Government

- Special events
- Telephone
- Sustainer Donors
- Planned giving
**ACQUISITION OR RENEWAL GIVING**

- Mail/email
- Special events
- Internet/online
- Telephone
- Payroll campaign

**TIPS**

- Include a powerful story and visual in your annual appeal letter/email
- Make appeal message easy to read – make solicitation obvious and easy to find
- Follow up a letter with a phone call
- Ensure the “Donate” button is on the first page of website

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**MAJOR GIFT GIVING**

- Major gift prospects
- Planned giving
- Board members

**Advantages**

- Provide support when the government, foundations and corporations cannot or will not – donor base is loyal
- 45% of NPOs received more than 50% of revenue from individuals*
- 77% of NPOs receive major gifts*
- 87% of NPOs received donations from board members*
- Total number of bequests are increasing annually

*2011 Nonprofit Fundraising Survey, Nonprofit Research Collaborative

**Challenges**

- Requires a long-term investment in time and energy
- Requires expertise and infrastructure to support ongoing efforts

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**STEWARDSHIP**

What donors want after giving:

- Prompt, personalized acknowledgment of their gifts
- Confirmation that their gifts have been put to work as intended
- Measurable results on their “gifts at work” prior to being asked for another contribution
INSTITUTIONAL GIVING

### Advantages
- Can be large in amount of support
- There are a variety of different grants available
- Receiving a grant from a high profile foundation can enhance reputation
- Foundations are transparent in their giving

### Challenges
- Reporting requirements can be onerous
- Often funding is restricted to programs, not general operating support
- Funding may be for a short period of time - no guarantees of future support
- What is the corporation’s moral reputation?
- Government funding is decreasing

STEP THREE

IDENTIFYING FUNDING NEEDS

STEP FOUR

CLARIFYING THE BOARD’S ROLE
BOARD MEMBER GIVING – 100%

All members should give a personal gift every year

TRUSTEE DEVELOPMENT PLAN

Let the board members determine their individual plan for participating in fundraising:

CULTURE SHIFT

Build a culture of philanthropy

Establish/maintain a board-level strategic fund development committee – that functions

Board Chair & Development Committee chair must fully embrace and understand the organization’s development needs and build peer accountability

Becoming effective ambassadors first will lead to increased comfort in fundraising
Partnering With CEO/ED

Board Chair & Development Committee Chair:

- Case for Support & Stories
- List of Current Donors Reviewed & Plan
- Support Ongoing Education for All Board Members
- Fund Development Plan – Board Annual Goal

EXAMPLE

**Goal:** Improve board support for philanthropy and fund development

**Strategies:**
1. **Adopt policies** defining the role of the board and performance expectations of board members, including specifics related to fund development.
2. **Ensure that screening interviews with candidates clearly communicate the expectations of philanthropy and fund development for board members, along with other performance measures.**
3. **Provide training opportunities for board members to expand their familiarity with fund development and reduce their anxiety.**
4. **Strengthen staff’s capacity to enable board members to participate in fund development.**

STEP FIVE

MAKE THE ASK
DONOR CULTIVATION CYCLE

Pool of Prospects → Quality Prospects → Initial Contact → Next Giving Opportunity → Interest

- Not Interested - Bless & Release
- Stewardship
- Thank & Share Outcomes
- Yes → Make the Ask
- Maybe
- Not Interested - Bless & Release

Large gifts – eighteen months of cultivation, on average (Grace & Wendroff, 2001, High Impact Philanthropy)

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REVIEW – 5 STEPS TO FUNDRAISING

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BY THE WAY...

IT TAKES MONEY TO MAKE MONEY
STORIES ARE POWERFUL - METRICS
CELEBRATE
ANNUAL RETREAT
THANK YOU FOR PARTICIPATING!

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We thank our BoardConnect funding partners:

- Community Foundation
- W.K. Kellogg Foundation
- McGregor Fund
- DTE Energy Foundation
- The HOPE Fund

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