



The Board's Role in Fundraising

Presented by Mary Sumners
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A vertical banner on the left side of the slide, featuring a grid of 12 small, faded portraits of diverse women smiling. Overlaid on this grid is the text 'About KENNARI CONSULTING' in white.

About KENNARI CONSULTING

Our Mission

To change the face of philanthropy, moving nonprofits of all sizes to greater capacity and meaningful impact within the communities they serve.

Services in:

- Campaign Consulting
- Grant Strategy Consulting
- Project/Program Development
- Annual Giving Consulting

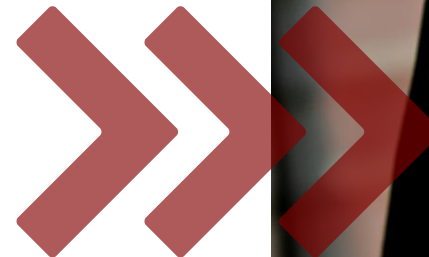
Introduction

Name

Mary Sumners, Kennari Consulting

Experience

*More than 25 years in fundraising
including consulting in board
governance*



Overview

- Fundraising engagement starts with overall **board engagement**
- A **board expectation policy** provides a clear description of needs and roles
- There are **four roles** that all volunteers, including board members can play in fundraising
- Board members **need support from staff** to be successful in fundraising

Keys to Good Board Engagement



Keys to Good Board Engagement

- Agendas that include meaningful discussion opportunities that help them meet their board responsibilities
- Effective Committee Structure
- Board Ownership and Accountability
- Opportunities to Build their Network
- Everyone at their Highest and Best Use



Board Expectation Policy

- Crafted and approved by the Board
- Used in the recruitment process
- Revisited/revised every two or three years
- Referred to as part of the term renewal or annual review process



Sample Board Expectation Policy

- Board members will not receive compensation for their service on the Board.
- Each board member shall become familiar with the agency's Bylaws and Policies.
- Board members are asked to monitor (not manage) the activities of the agency including program outcomes, financial performance and human resources.
- Board members should serve on at least one committee and serve on work groups as assigned by the Board Chair.

Sample Board Expectation Policy

- Board members may not use or distribute confidential agency lists or information for their private purposes.
- Board members will make an annual contribution commensurate with their ability to give.
- Board members will participate in annual fundraising activities including attending special events and assisting in the identification, evaluation and solicitation of donor prospects.
- Board members will participate in the recruitment of new board members.
- Members shall attend regular Board meetings and those called by the Chair.

Four Roles of Fundraising

1

Providing
Intel

2

Inviting
Prospects to
Participate

3

Asking for
the Gift

4

Thanking
Donors

Providing Intel

- Information helps staff determine **the right cultivation pathway** for each donor prospect
- **Volunteers and Board Members often have more information** than we can glean from wealth data or what donors tell us
- **Information can range** from understanding what part of your mission they might like most, to engagement with other nonprofits, to a potential ask range
- Specific information about **why they might be compelled to your organization** is particularly helpful



Inviting

- **Board members can invite others** to events, tours, open houses, or simply to like your social media or visit your website
- **A personal invitation from someone they know can compel a prospective donor to attend** when they might not otherwise
- In addition to events, board members **can invite donor prospects to serve** on committees or join the board
- An “invitation” might include asking them to follow social media or join a mailing list

Thanking

- **A thank you from a board member** should always be in addition to formal recognition by the organization.
- **Thank you calls and “thank-a-thons”** are great ways for board members to learn more about your donors.
- Those that were asked by a board member **should be thanked by that same board member.**



Asking

- **Sometimes donors would prefer to be asked by their peer or friend**, whether that person is present in the meeting, or they are asking directly.
- **A personalized note on a direct mail piece, or sent via email with a personal note greatly increases the likelihood that a gift will be made.**
- **Board members who are comfortable asking can be utilized in many ways**, including following up on sponsorship requests and making connections with major donors.

Time to Implement!



Set a regular annual time to sit down with each board member.



Be prepared with some ideas to get the conversation going.



Use a planning tool or other type of documentation to be sure you can help them set and meet their goals.



Touch base often.



Share positive examples at board meetings or in other board communication.



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Q & A

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