

How to Effectively Engage Your Board in Fundraising



Presented to The Foundation of Delaware County
February 15, 2024

Team



Courtney Delaney

32 years of experience in program development & delivery, fundraising, marketing, education, and financial management

Former employers include Horizons at Episcopal Academy, Villanova University, eBay, Bank of America



Emily Hawkins

20 years of nonprofit leadership experience as VP, Exec Director, and board officer. Specialized in growth strategy and organizational transformation.

Former employers include Horizons Atlanta, Kate's Club, Leadership Atlanta



Kathy Jacoby

27 years of nonprofit leadership, fundraising, human resources, strategic communications, and financial analysis experience

Former employers include Horizons Greater Philadelphia, Horizons at Episcopal, Inverness Graham, Comcast and PNC Bank



Karen Wolters

25 years of experience in financial planning & analysis, strategic communications, and special projects

Former employers include The Woodward Group, PNC Bank, Murdock Martell, & Boston Scientific Corporation

Board Engagement

Successful Board engagement **multiplies** impact for those we serve.



Get to know your board



Matrix of Board Members and skill sets

	Professional Affiliation	Skill sets	Board Committee	Social Media Presence	Volunteer Preference	Network Share	Current Gift	Matching Opportunity	Comments
Board Member #1	Comcast	CPA, Public Relations	Finance	Active on Linked In	Prefers administrative assistance to program interaction	Well connected in Delaware County Community	\$5,000	Yes	Mentioned potential opportunity for financial literacy programming
Board Member #2	Mastery Charter School	Principal	Program	Active Facebook, Instagram	Very interested in hands on volunteer work	Active Church Affiliation	\$5,000	No	Willing to speak at events
Board Member #3									

- Identify connection opportunities
- Identify ways they feel most comfortable contributing
- Optimize corporate giving opportunities

Get to know your board



- **Board Member Communication Log**

	Board Member #1	Board Member #2	Board Member #3
January Contact	Thank you text for specific funding	Text Picture of volunteering	
February Contact	Board Meeting	Board Meeting and Event Sponsor Ask	
March Contact	Committee meeting, email story about student	Committee meeting, Program questions	

- **Personalize contributions**
- **Ensures everyone stays engaged and connected**

Setting Expectations



Board understanding of fundraising role

- Outline **fundraising expectations** in board job description
- **Leverage personal connections, networks and resources** to help your organization achieve its mission
- Board members should be active **ambassadors** for your organization



Setting Expectations

For successful Fundraising Campaigns.....



- **WHO** is the target audience?
- **WHAT** is the fundraising initiative? **WHAT** makes it effective?
- **WHEN** is the right time to engage - provide “playbook” with clearly outlined schedule
- **WHERE** to give? Identify giving channels
- **WHY** is it important?



Setting Expectations



Communicate **Organizational Goals and Expectations**

- **\$ amount**
- **New donors**
- **Board participation**
- **Other goals**



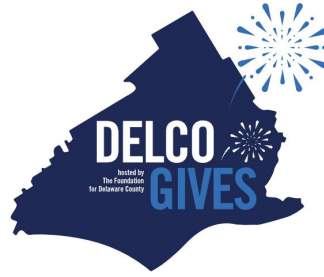
Make a Direct, Specific Ask

How can Board Members help?

- Engage on social media
- Make a gift online
- Leverage community connections
- Host a mini-fundraiser
- Help thank donors



Board Resources



Provide support for board members:

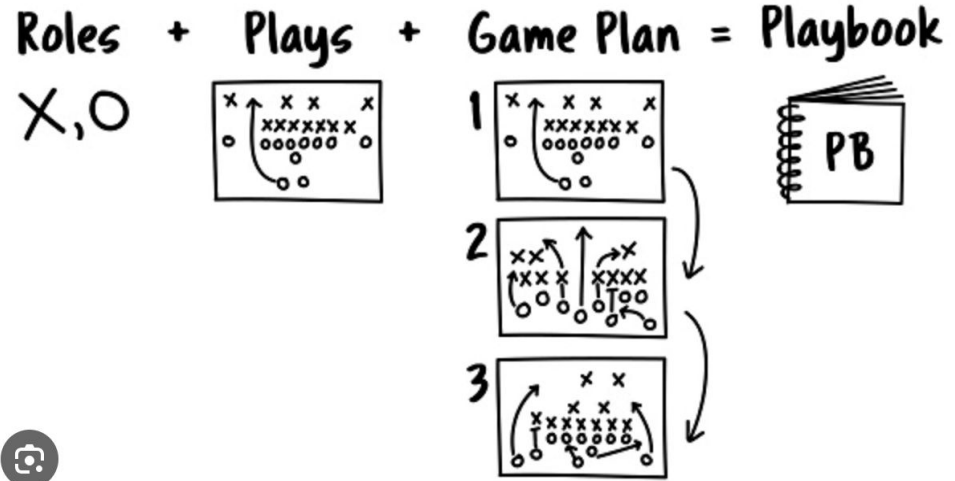
- Help them establish a **personal goal**
- Provide email, text message and social media **posting examples** with copy and photos
- Share a suggested **communications schedule**

Board Resources



Online Event Communications Guide

- General Messaging Points
- Sample Emails
- Sample Social Media Posts
- Thanking Donors



Promote Engagement



- Plan a **volunteer opportunity**
- Have a member of the community you serve **speak** to your board
- Ask a board member to **match donations** for Delco Gives
- Ways board members can share out their work with your organization



Group Action Plan Exercise

1. Write 3 practices you can implement with your Board for DelcoGives
2. Share with your group
3. Discuss any challenges or obstacles you face



Services



 Strategy

 Fundraising


 Organizational Leadership

 Communications

 Financial Management

 Organizational Process Alignment

 Board & Governance Support

 Special Projects



ALIGN

— PARTNERS —