

Top 10 Strategies to Involve Nonprofit Boards in Year-End Fundraising:

YOUR COMPREHENSIVE SOLUTION KIT



INTRO

There's no busier time for fundraisers than the last quarter of the calendar year. So much needs to get done it should be easy to find more than one way to involve each board member.

It's not all about asking for money; there are [numerous ways board members can help](#) without making a single ask.

Most critical is to develop a written plan to organize and prioritize your board fundraising involvement strategies. Here's a "Top 10" list to help you get and stay on track in inspiring board members to become more invested in year-end giving and getting.

You need to hold both your own and your board members' feet to the fire!



1. Individually solicit each board member. Board members are special.

They shouldn't be treated just like any other donor. Because they're your leaders, you need them to lead. This means you must role model effective solicitation. Show them how important they and their philanthropic commitment to your cause is to your ability to continue your mission.

Flatter them. Make them feel important. If they've already made a commitment, consider asking them for an increase at this time. Encourage them to make a passionate, thoughtful gift, not just a habitual or token one.



2. Secure personal giving commitments.

Once you've met with each board member, be sure to confirm their pledge. In writing. Research shows [we're likelier to follow through on commitments](#) if they're in writing and shared with others.

Ask board solicitors to report back to you immediately after they've met with their assigned fellow board member so you can send a confirmation letter, e.g., "Thanks so much for taking the time to meet with Mary. She tells me you've agreed to commit \$1,000 to this year's annual campaign. You are awesome! I'm

enclosing an envelope for you to return your gift, or I'm happy to take your gift over the phone. Might you want to consider a gift of securities to take advantage of the opportunity to bypass capital gains? I'll give you a call in the next few days to see how you'd like to fulfill your commitment."

Note: Sometimes people will give more when they realize [it costs less to make a gift of appreciated stocks](#).



3. Ask board to let their friends be yours.

Prospect identification is an easy way to introduce board members to fundraising. Create a “Let Your Friends Be Our Friends” initiative. Ask: “Who among your contacts (friends, neighbors, relatives, professional colleagues) might you introduce to our cause?”

Ask everyone if they can give you just five names. While you’re at it, ask if they’d be willing to write a personal note on the appeal letter that will be sent to these individuals.



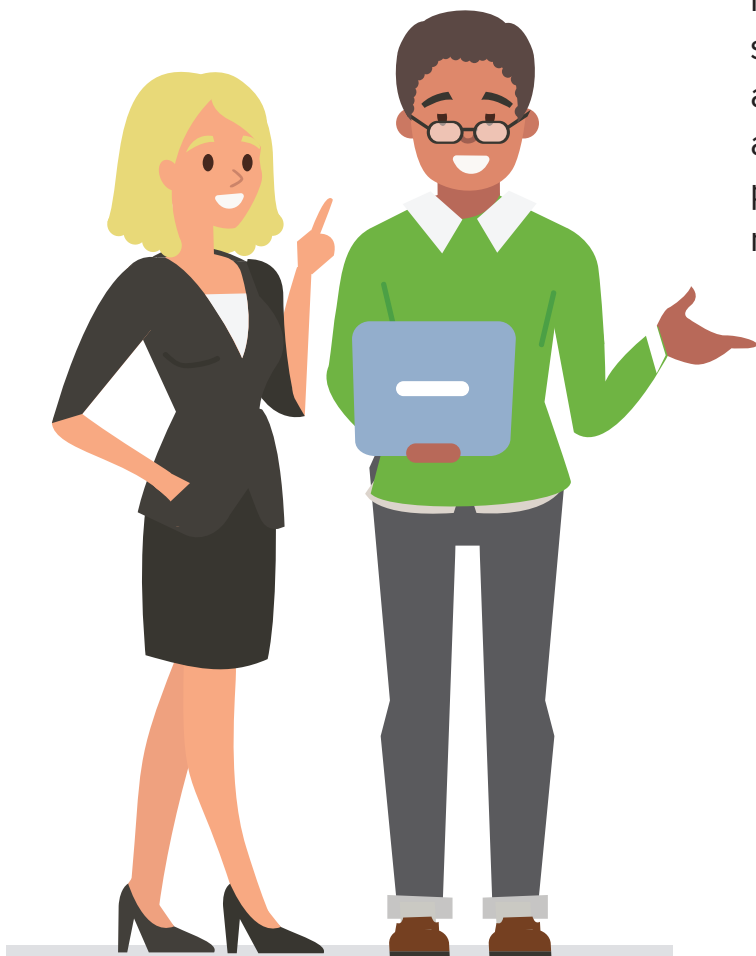
4. Ask board to write personal notes on appeal letters.

People give to people! While I don't have a large data study to reference, anecdotally I've found that adding simple personal notes on fundraising appeals can significantly boost response – from as little as 2% to as much as 23%. So this is well worth doing!

The best way I've found to get this accomplished is to ask every board member to develop their own personal “note-writing list.”

When a new board member is added to your team, make it a practice to ask them to give you a list of names of potential donors. Make sure they also review your existing list of donors to see who they might know. All of these contacts combined can be used to create their personal list.

It's also important to ask current board members to review your donor list to see what folks they might add to their existing list. If your list is enormous, particularly single out (1) donors who've given \$100+ and who have no assigned note-writer, and (2) prospects with high giving potential who have no assigned note-writer.



5. Divide the board into fundraising teams.

Once board members have committed to helping with fundraising, they're ready to take on solicitation assignments. Make it fun by approaching it as a group endeavor.

Create teams of 4 to 6 members each, depending on the size of your board. Ask one member to be the "captain" who will serve as chief coach and cheerleader. Give the teams names to help create a sense of identity and esprit de corps.

Since it's not likely that every board member will have a large list of their own, give each team member specific assignments. For those not yet ready to make asks, assignments can include hosting a house party, leading a tour, inviting a friend to an existing event, or taking someone out for coffee to thank them for their previous support.

In that case, make sure the board member follows up with each prospect to see what they thought and whether they'd welcome contact from a staff person about ways to become more involved.

Build a friendly competition that includes awards for different categories, e.g., team giving most new contacts; team bringing in most new donors; team making most in-person connections; team with most total commitments; team raising most dollars; team securing most upgrades, etc.



6. Ask board members to join your peer-to-peer fundraising initiative.

People respond better to people than they do to organizations. Especially when it's people they know and trust. This is why response to peer-to-peer fundraising is about 25% compared with direct-to-donor campaigns where response is 1% to 2%. [So if you've not yet engaged in P2P fundraising, this is the year to begin.](#) There are two P2P fundraising options that work well:

- **Develop a P2P arm of your year-end campaign.** There are numerous companies who will help you [set up a campaign](#) and build online, customizable fundraising pages for you. They also can help you integrate these pages with your social media accounts so folks can instantly spread the word about your campaign (see [here](#)).

If you don't already have an online database or CRM that will enable P2P fundraising, you can still run an online campaign by developing an email template your board members can tweak and share. While you're at it, develop some variations they can share on social media. You can email these to board members as well as post them to a private central platform on your website.

Keep a number of compelling real stories on this private space to inspire your fundraisers, as well as give them additional information to share.

- **Consider a simple DIY initiative.** Have board members [ask their networks to join them by making donations to your cause in honor of their family and friends.](#) Encourage them to think of this almost as offering a convenient holiday gift-giving service – no shopping required!

Make sure you're set up to send warm notes to recipients of these tribute gifts, letting them know gifts have been made in their honor. And, of course, thank donors and solicitors wholeheartedly, as well.

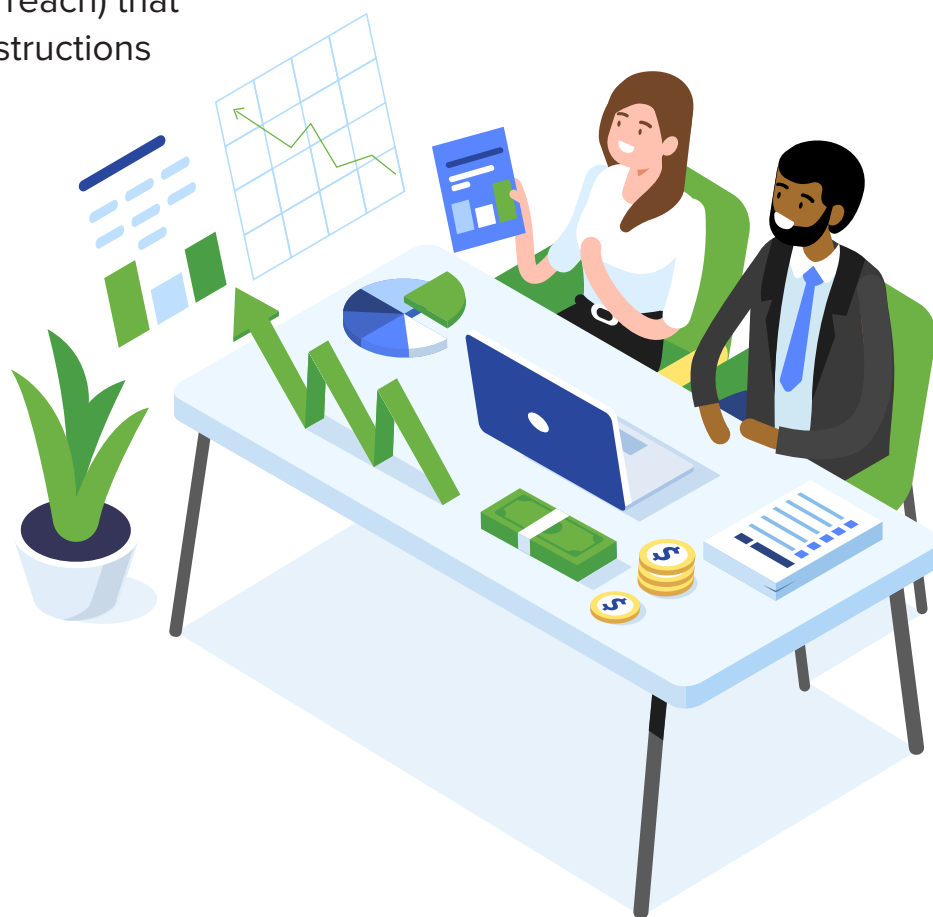


7. Assign board members to lapsed donor efforts.

Don't lose current donors! An easy way to encourage renewals among those who gave last year but not this year (yet) is to hold a lapsed donor phonathon. Give board members a brief script, and a training (with dinner!) on how to use it.

When I've run these phonathons I've been amazed at how many donors said "Oh, I didn't give yet? I thought I did. Sure!" Very few donors had lapsed intentionally. You can take credit card commitments over the phone or follow up with notes (even to the folks you weren't able to reach) that include remit envelopes and instructions on how to give online.

Most board members report enjoying these calls because they begin with "thank you" and the folks they talk with tend to say really nice things about the organization – including thanking them for their board service. In other words, these aren't "cold" calls.

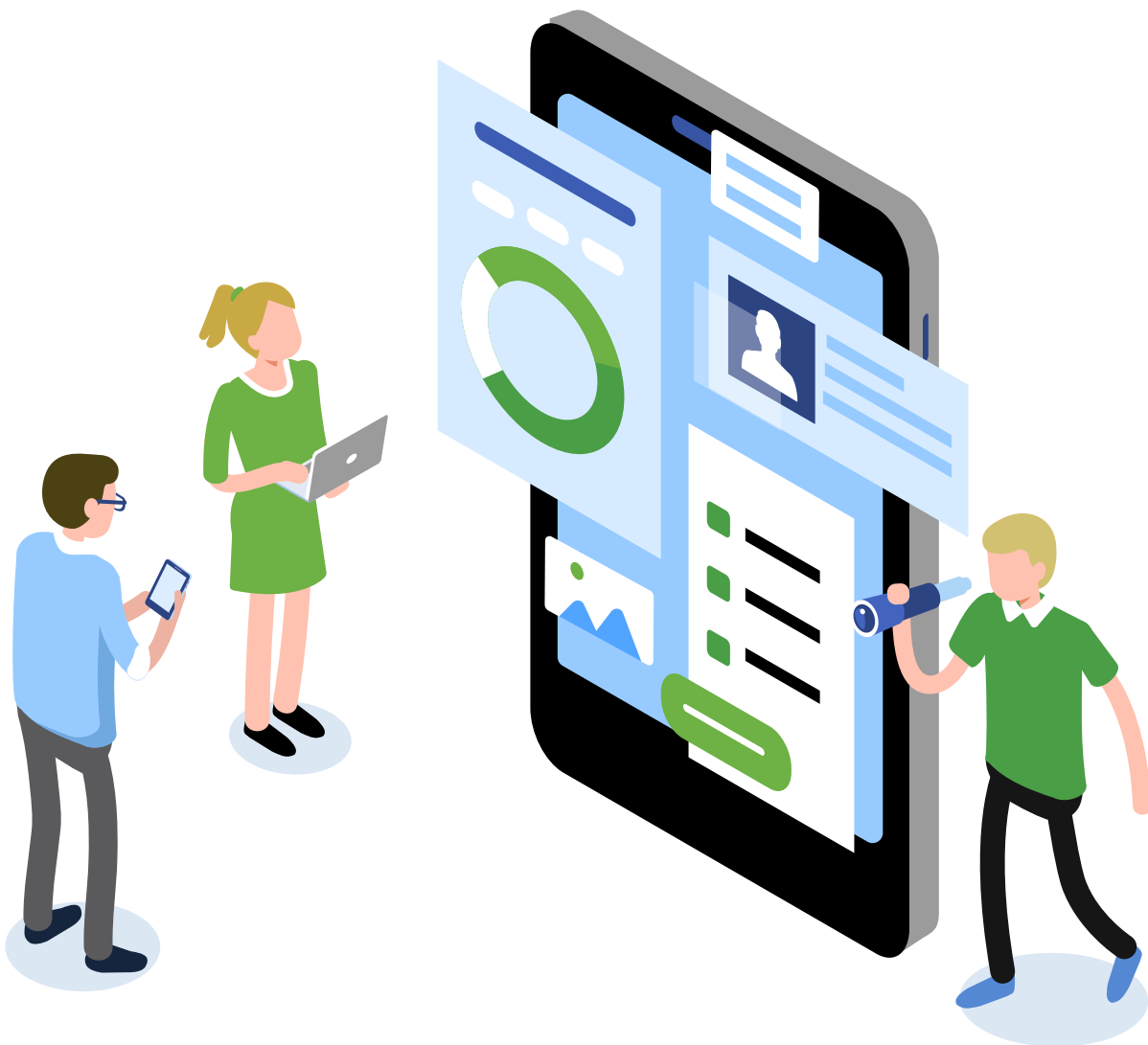


8. Ask board to make targeted phone and face-to-face asks.

At year's end, make your board a "development committee writ large." Don't silo the major gift fundraising function in one committee. It's every board member's responsibility to help assure you have the resources to fulfill your mission.

While not everyone will take on 4 to 5 assignments (that's for the development committee), everyone can take on 1 to 2. For those who are hesitant, give them phone assignments where you know the donor will say "yes" to renewing their \$1,000 commitment.

This is a gentle way to introduce members to the process, and to give them a "feel good" win that contributes to their team!



9. Ask board to accompany you on major donor visits.

A good fundraiser gently supports board members and helps them find meaningful ways to contribute. One way to demonstrate “the gentle art of teaching the joy of giving” ([Hank Rosso](#)) is to bring your board member with you on solicitation visits.

They don’t have to ask. Their role is to provide testimonials as to why they support you. Along the way, they’ll see how the solicitation is done and will, hopefully, someday become comfortable assuming the solicitor role themselves.



10. Track progress, report back and celebrate.

Fundraising is about sharing passion, and passion is contagious. If you want to inspire and engage your board in year-end fundraising, you absolutely have to communicate with them regularly. Only when you show you mean it will they be empowered to mean it as well.

Here are a couple ideas to help you get started.

- **Send regular emails to update board members.** Communicate progress on campaigns, e.g., number of gifts, total dollars raised, and tell inspiring stories that have come out of their efforts. For example, you can share that Sally's neighbor made a gift as a result of them chatting when they were bringing their garbage cans in from the curb; George brought in a new \$2,500 donation from his law firm; and our staff campaign just achieved 100% participation.

- **Hold a celebration at the end of the campaign.** Make everyone feel like a winner (because they all participated) by passing out individual and team awards.

If you're thinking "my board won't do this," think again. Just because they haven't done it in the past doesn't mean they won't do it with the right leadership and encouragement. Enlist a board champion (e.g., board or development committee chair), and let them know when board members are given specific assignments. Give them support along the way so they feel more dedicated about their board service.

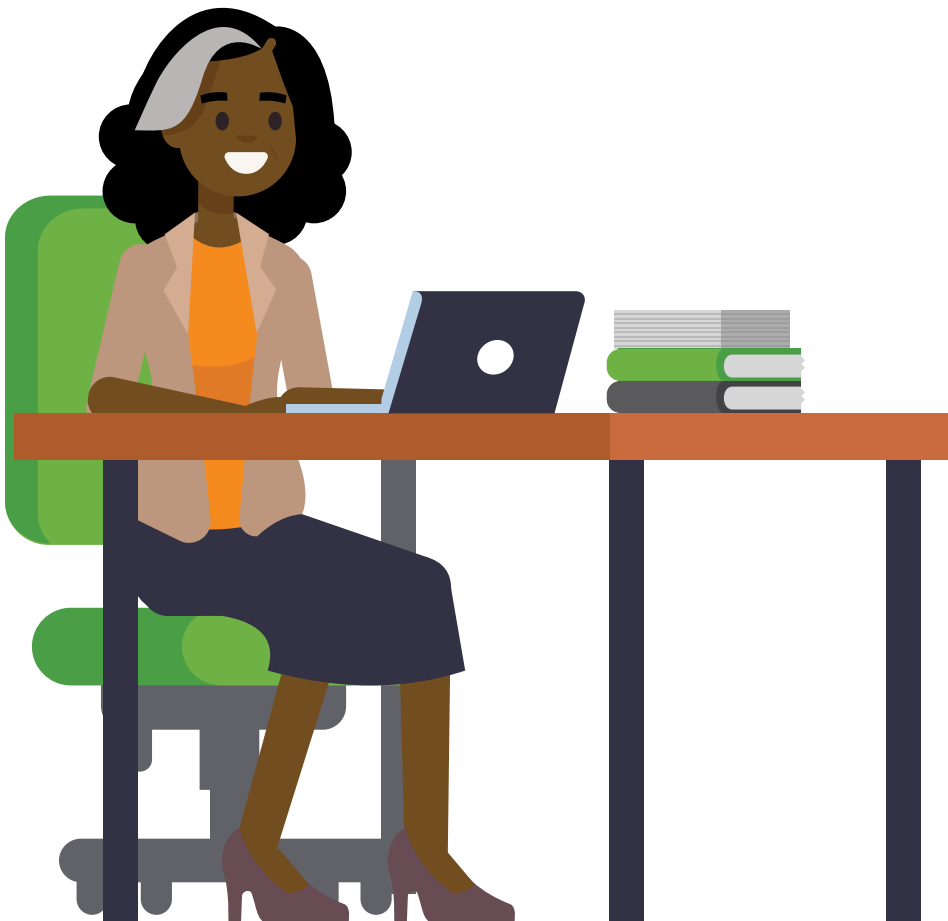
Note: Remember, board members want to help; they just need a structure to facilitate their participation.

Summary

As the end of the calendar year draws near, the pressure to meet your nonprofit's short-term and long-term fundraising goals will intensify. You need everyone on your team to help make them a reality.

With each of your board members becoming more fully involved in your fundraising activities, you can significantly increase your odds of success. Use these top 10 strategies to involve your board members in your campaigns.

They will be even more inspired to support the cause they love!



ABOUT THE AUTHOR



CLAIRE AXELRAD

Claire Axelrad, J.D., CFRE, is a fundraising visionary with 30 years of frontline development work helping organizations raise millions in support. Her award-winning blog showcases her practical approach, which earned her the AFP “Outstanding Fundraising Professional of the Year” award.

Claire, who teaches the CFRE course that certifies professional fundraisers, is a regular contributor to Guidestar, Nonprofit Pro, Network for Good and Maximize Social Business. Her passion is coaching nonprofits to address 21st century challenges and overcome barriers to sustainable funding.





5724 Birtz Road,
Indianapolis, Indiana 46216
(317) 296-8100

bloomerang.co

