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# Empowering Your Board for EOY Fundraising and Strategic Engagement in the New Year

*1 CFRE credit is available for live attendees.*

Presented by:

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# About Me

- My focus areas include annual funds, major gifts, and grants to ensure sustainability and success.
- MA, CFRE, & Certified Facilitator
- Active in fundraising organizations like AFP and Girls on the Run South Louisiana.
- First-generation college grad with a Master of Art in Philanthropy and Development.



# Why We're Here

- Challenge:
  - Boards often underperform due to unclear roles or low engagement.
- Goal:
  - Empower boards for EOY fundraising, sustain year-round engagement, and plan for 2025 success.



# Learning Objectives

- Discover how to actively engage your board in EOY fundraising efforts to maximize impact.
- Learn best practices to sustain board involvement in fundraising throughout the year.
- Explore strategies to cultivate long-term, strategic engagement that drives future success

**Stay until the end for an exclusive resource to help supercharge your board's efforts!**



# Key Roles in Fundraising

Four board roles:

- Ambassador: Raise awareness.
- Connector: Open doors to donors.
- Solicitor: Make confident asks.
- Steward: Build lasting relationships.



# Which role is most utilized by your board?



# Why Boards Are Essential

- Boards build credibility.
- Boards access donor networks.
- Boards deepen stakeholder trust.



# How has your board brought credibility or trust?





# Case Study: Girls on the Run South Louisiana



Make a **big difference**  
with just one gift!

Your investment gives her...

- ✓ Confidence
- ✓ Love of movement and physical activity
- ✓ Tools to support her mentally and physically
- ✓ Trained, caring mentors
- ✓ After-school snacks to fuel her



Girls on  
the run  
south louisiana

GIVE **CONFIDENCE**  
in our community

# Setting the Stage

Steps for success:

- Define clear roles and expectations.
- Provide scripts and tools.
- Align board goals with organizational priorities.



# Quick Wins for EOY Fundraising

Actionable strategies:

- Personalized donor outreach scripts.
- Matching gift campaigns.
- Pre-made social media posts for advocacy.



# What role could your board play in your next campaign?



# Transition to Strategic Engagement

- Use EOY momentum to set a positive tone for 2025.
- Celebrate board contributions in January.
- Set measurable 2025 goals.



# Kickoff Meeting & Training

- Celebrate wins during a January kickoff meeting.
- Provide training to align on goals and equip board members with tools.



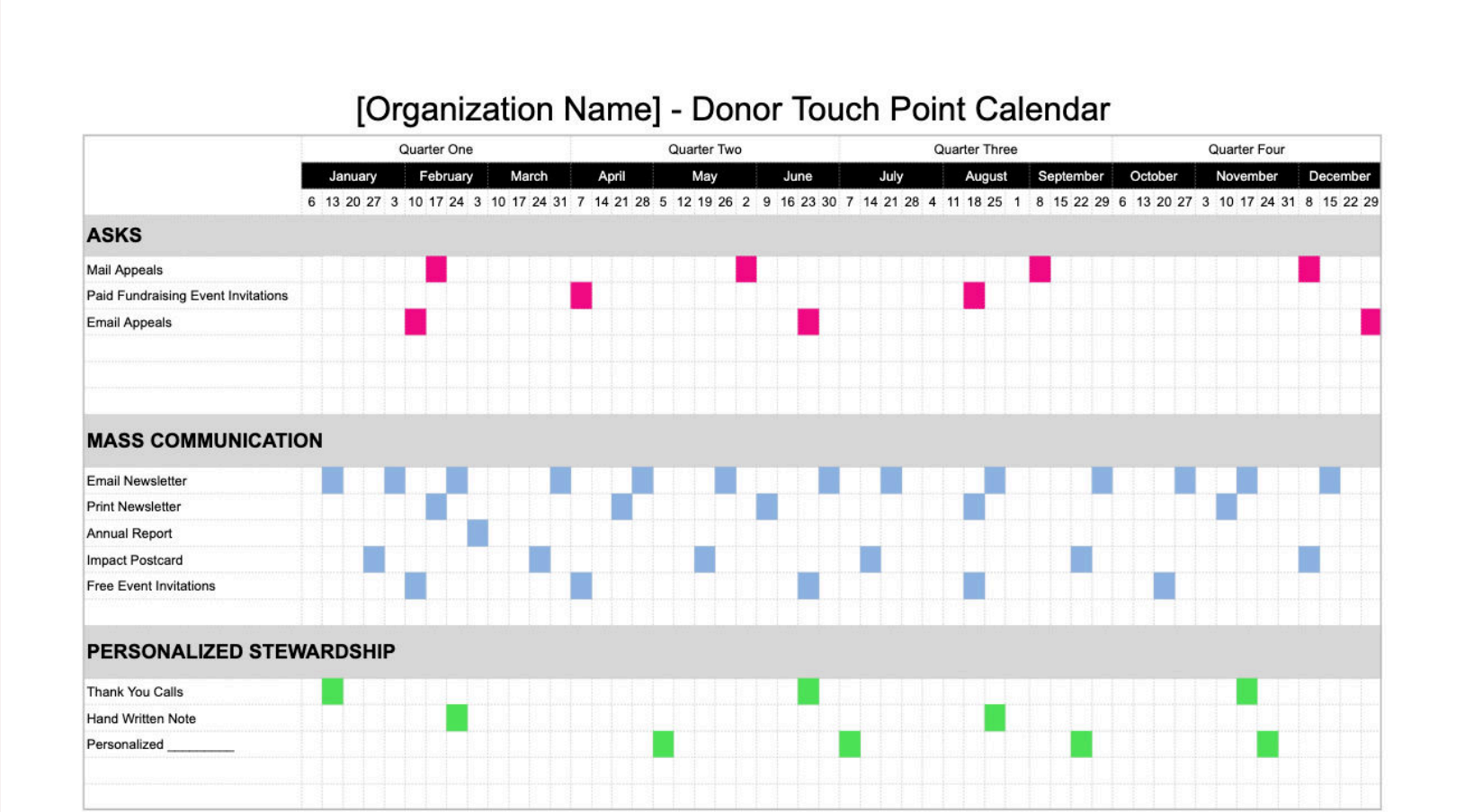
# What's one board achievement you're proud of?



# Monthly Engagement Tasks

Suggested monthly actions:

- January: Thank-you calls.
- February: Share impact stories.
- March: Donor tours.
- April: Matching gift programs.





# Donor Cultivation & Stewardship

- Assign board members to steward key donors.
- Conduct quarterly check-ins for relationship building.



5 x 5 – Plan for Donors: Invite. Engage. Inform. Ask

Donor Names: 1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_ 4. \_\_\_\_\_ 5. \_\_\_\_\_

Relationship Builder (Board Member): \_\_\_\_\_

Ideas	Month/Donor	1.	2.	3.	4.	5.
Phone Call In-Person Visit Birthday Card Personal Note Newsletter Email	January					
	February					
	March					
	April					
Invitation to: Lunch/Coffee Site Visit Event Volunteer Serve on Committee	May					
	June					
	July					
Announcement: EOY Campaign Success Event Success	August					
	September					
Congratulations: Award Achievement Promotion Retirement	October					
	November					
	December					

# Building a Culture of Philanthropy

- Empower boards through consistent training and tools.
- Regularly reinforce a commitment to the organization's mission.



# Training & Tools

- Equip boards with updated scripts, templates, and metrics.
- Provide actionable resources to sustain engagement.



## Donor Discovery Tips and Questions

### GETTING TO KNOW YOUR DONOR "The Initial Discovery Stage"

People make philanthropic gifts for their own reasons and based on their own passions. And discovering these reasons and passions are key to building a stronger relationship with a donor/prospect. During each donor/prospect meeting, there should be a plan to discover information to increase the donor's involvement in our mission.

**Remember it may take months to build a donor-centered relationship. Take it step by step. When the donor/prospect begins to feel comfortable with sharing personal information, it is an indicator that they are increasing the trust level they have for you.**

#### Three Areas of Discovery:

##### 1. Clear understanding of their emotional needs

- Do their interests match our mission?
- Do they want to make a difference?
- Do they feel a connection with your organization?

##### 2. Understand financial issues

- Do they have the financial capacity to make a substantial gift?
- Does our mission pull at their emotional heartstrings?
- Do they have trust in our organization?

##### 3. Understand their decision-making process

- Who? What? How? And When?
- Are there any gatekeepers or influencers? that should be included?

#### Always PLAN for Discovery during a meeting...

- Make a list
- Review the list
- Pick one area to explore
- Drill down
- Summarize

# Fast-Track Your Board's Success

*Start 2025 with confidence! This exclusive Strategic Board Assessment is your opportunity to empower your board for maximum impact in the new year.*

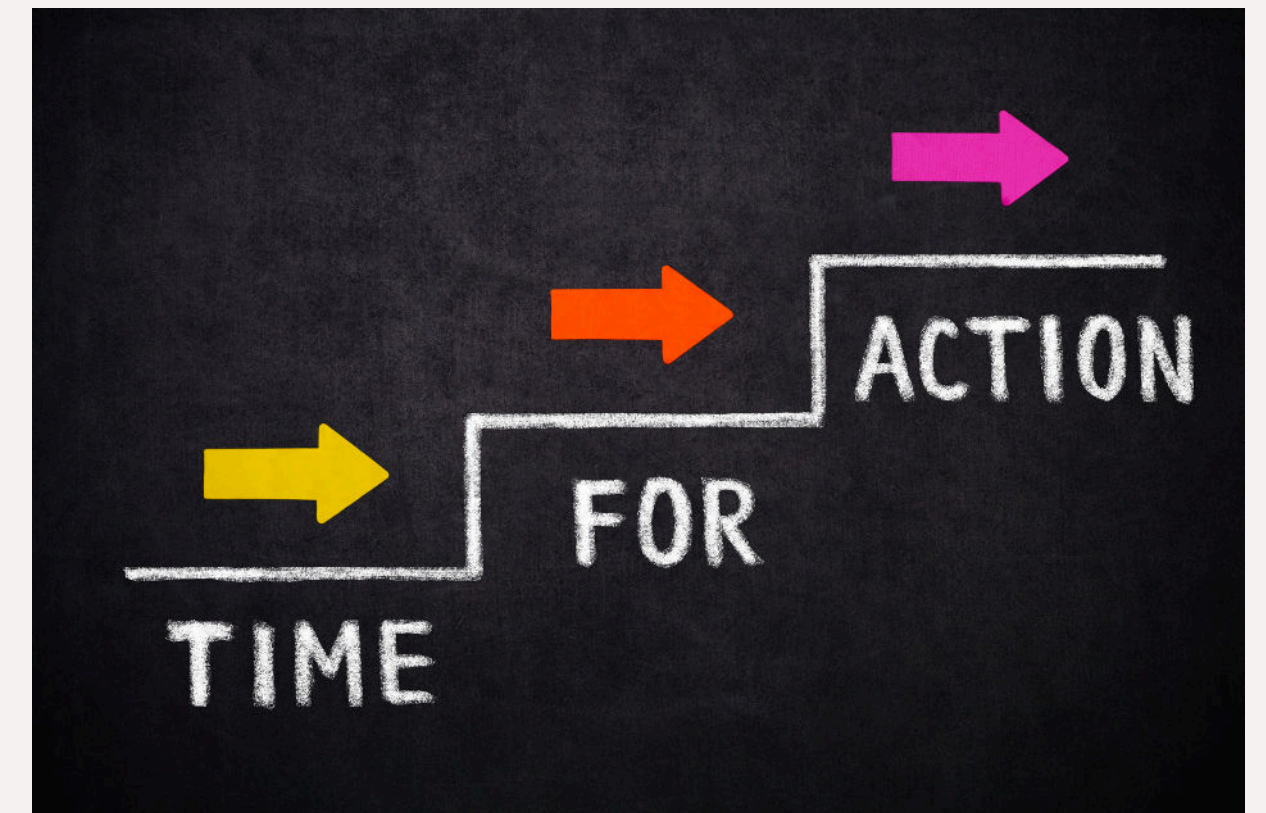
## What's Included:

### Strategic Board Assessment (30 minutes)

- Evaluate: Assess how your board is positioned to support your 2025 goals.
- Identify: Pinpoint opportunities to align your board's strengths with top priorities.
- Create: Develop a tailored action plan with clear next steps to drive results.

### Board Success Action Guide

- Define the top three focus areas (e.g., fundraising, governance).
- Highlight key board roles: Advocate, Connector, Fundraiser.
- Kickstart board engagement with quick Q1 actions.



# Empower Your Board – Act Now!

## Why This Matters

- Empowered boards drive mission success.
- Engage your board effectively from day one.
- Achieve your fundraising and organizational goals in 2025.

## Act Now – Limited Spots Available!

- Exclusive to webinar participants.
- Only 10 sessions are available in January – Spots are filling quickly!

## Reserve Your Strategic Board Assessment

👉 <https://calendly.com/marci-bradley-consulting/strategic-board-assessment>



# Key Takeaways

Let's recap:

- Boost EOY fundraising with board involvement.
- Sustain engagement through monthly actions.
- Strategically plan for 2025 success.



# Biggest takeaway from the webinar?



# Final Tip!



- Make gratitude a cornerstone of board engagement—it drives sustained involvement.







# Give Feedback to Marci



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QR CODE



# Thank You!

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