The Role of Leadership (Board & Staff) in Resource Development

Community Action Partnership Management & Leadership Conference
Houston, TX

with Stephanie Roth
Klein & Roth Consulting

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Key Responsibilities of Nonprofit Boards

• Establish Strategic Direction
• Ensure Resources:
  o Funds
  o People
  o Reputation
• Provide Oversight/Accountability – financial, mission, programs, personnel
Elements of Successful Fundraising

- Compelling Case for Support
- Willingness to Ask for Money
- Strategies for Acquisition, Retention & Upgrade
- Team of People
- A Fundraising Plan
- Infrastructure & Technology
FUNDRAISING BRIGHT SPOTS:
STRATEGIES AND INSPIRATION FROM SOCIAL CHANGE ORGANIZATIONS
RAISING MONEY FROM INDIVIDUAL DONORS

By Jeanne Bell and Kim Klein
#2 FUNDRAISING IS DISTRIBUTED BROADLY ACROSS STAFF, BOARD, AND VOLUNTEERS
“We engage staff in two fundraising vehicles a year: our gala and our membership drive. They know these are coming and when they’re going to end; they know they’re going to have to set a goal. We provide talking points, tracking sheets, trainings, one-on-ones, all kinds of materials that people need to engage. We do regular check-ins about the outcomes; it’s very transparent. It’s not about public shaming but collective accountability.”

--Development Director, CHIRLA
The Board’s Role in Fundraising:

- Give Money
- Raise Money
- Develop Fundraising Philosophy & Strategy
- Set Fundraising Policies
I, Cecilia Ortiz, board member, agree to:

1. Contribute $250 by Dec. 31st
2. Sell at least one table of tickets (10) to our annual dinner
3. Solicit 8 local businesses for ads in our ad book
4. Participate in major gift campaign by asking 5 donors for a gift of $500 or more
Characteristics of Strong Teams
Leadership Compass

Exercise: What’s your work style?
Some Ways to Participate in Fundraising

1. Ask friends who care about the cause to give
2. Provide names of people to ask
3. Ask current donors to renew their support
4. Meet with donors
More Ways to Participate in Fundraising

5. Organize a house party
6. Help with organizing a special event
7. Participate in a crowdfunding event
And Even More Ways...

8. Solicit businesses for in-kind gifts
9. Participate in meetings with funders
10. Thank donors for their support
8. Help with creating annual fundraising plan
Build the skills of your board and volunteers

Meaningful but not scary fundraising tasks

Asking donors likely to say yes; working on a campaign

Soliciting large gifts as part of a team

Heading Major Gifts Team

Planned Gifts
Recruiting Team Members

www.kleinandroth.com
What do you need from team members

• Specific skills
• Willingness to work
• Familiarity with cause
• Connections to communities you want to reach
• Complementary work styles
Recruiting team members

• Avoid people who:
  – are too busy
  – aren’t passionate about your cause
  – don’t work well with others
Recruitment, cont

Who is in your networks?

• Students
• Recently retired
• Current donors
• Former staff and/or board members
• Members of your constituency
• Vendors
Interview Prospective Team Members

• What is your experience with fundraising (or specifically with the activity you’re recruiting them for)?
• Do you have 3-5 hours per month to give?
• What kind of activities are you willing to do?
Provide team with ongoing support

• Materials (eg, sample letters, talking points)

• Support (fundraising “buddy”, follow up calls, help with problem-solving)

• Coordination (minutes of meetings, record-keeping)
You Need a Champion (or two)

Recruit a volunteer chair (or co-chairs) of your team to help guide and support the rest of the team’s efforts.
Final Tips for Creating a Successful Fundraising Team

1. Expectations are clear.

2. Everyone identifies the tasks they’re willing to do.

3. Although some people are resting on the bench, or offstage, no one is in the audience.
4. Everything is documented.

For example:

• All meetings have minutes which are sent out within 48 hours of the meeting

• A list of TASKS and PERSON RESPONSIBLE is included in the minutes.
5. Someone follows up with team members to provide support.

6. No one is talked into being on the team. People are invited and they accept with enthusiasm, or they decline with regret.
7. All work is time limited: as little as a few hours to as much as eight weeks. Everything has a beginning date, a goal and an end date.

8. There is time off for good behavior.

9. Team members are thanked and appreciated.
Resources

- **Grassroots Fundraising Journal** – grassrootsfundraising.org
  - *All Aboard: Boards that Work*, by Kim Klein & Stephanie Roth
  - *Build Your Fundraising Team*, by Christa Orth
  - *Building Awesome Boards*, by Kim Bobo

- **Ditch Your Board Composition Matrix**, by Jan Masaoka, blueavocado.org

- **Blue Ribbon Nominating Committee for Your Board**, by Jan Masaoka, blueavocado.org

Stephanie Roth is a trainer, consultant and coach for organizations working for social justice, with a focus on fundraising, board development and meeting facilitation. Stephanie has written widely on the topic of fundraising and organizational development, and is the co-author (with Mimi Ho) of *The Accidental Fundraiser: A Step-by-Step Guide to Raising Money for Your Cause*. She was a co-founder of GIFT (Grassroots Institute for Fundraising Training), and was the Editor of the Grassroots Fundraising Journal -- for eleven years. Stephanie is currently working as a part-time development director for the Community Land Trust Association of West Marin (CLAM).

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