

United Way Agency Strategic Transition Series
Session 9: Board Engagement in Fund Development
Friday, February 8, 2019
9:00 am to 2:00 pm (Part 1: 9am-noon; Part 2: 12:30-2pm)

Overview:

The purpose of today's workshop is to help fully engage and support Board members in becoming more effective fundraisers, including delivering messages to maximize fundraising success

Objectives of this workshop:

- Advance learning about the infrastructure needed to support the Board's role in fundraising
- Gain understanding about Board roles & responsibilities to develop and maintain financial resources
- Improve knowledge about strategies to help Board members be more engaged and effective in fundraising
- Create impact Statements and other messaging tools and explore ways to maximize messaging
- Enhance ability to overcome the fear of asking for gifts by getting comfortable with 10 seconds of courage

Workshop Agenda

Time	Activity
9:00 am	<p>Welcome and brief Series Overview- Julie Simon, Director of Agency Capacity Building Initiatives, United Way</p> <ul style="list-style-type: none"> ■ Commences session; reminds about Series intent, framework & microphone usage* ■ Participants can take notes on hard copy PP presentation included in packets ■ Introduces presenter
9:05 am	<p>Part 1: Presentation & small group exercises on Board Engagement in Fund Development – Pete Werner, Nonprofit Consultant</p> <ul style="list-style-type: none"> ■ Outlining fundraising individually/collectively as Board, barriers to effective fundraising ■ Small group exercises: focusing fundraising efforts; racial equity lens application <p>Break – 10 minutes</p> <p>Presentation continues, plus small group exercises:</p> <ul style="list-style-type: none"> ■ Consider board fundraising strategies and solutions ■ Small group exercise: assessing Board's current status of fundraising, barriers & solutions
11:55 am	<p>Part 1 Conclusion – Julie Simon</p> <ul style="list-style-type: none"> ■ Participants share take-aways of experience ■ Reminder: if leaving before training conclusion, please complete & submit workshop survey
12:00 noon	Lunch provided
12:30 pm	<p>Part 2: Presentation & small group exercise on Crafting Compelling Messages – Wendy Dyer, Wendy Dyer Fund Development Consultants</p> <ul style="list-style-type: none"> ■ Overcoming hurdles of developing/delivering effective messaging and making the ask ■ Small group exercise: homing in on developing strong messages
1:55pm	<p>Part 2 Conclusion - Julie Simon</p> <ul style="list-style-type: none"> ■ Participants share take-aways; reminder to complete & submit survey before leaving ■ Connect to next Session #10: Optimizing Board Effectiveness (3/8/19)

*UW requests Series participants use microphones so that all can hear/partake in the learning experience.