



United Way
of Greater St. Louis

MEMBER AGENCY STRATEGIC TRANSITION PLANNING SERIES

2-8-19 | Session # 9 | 9:00am – 2pm: Part 1: 9am - noon | Pete Werner; Part 2: 12:30 – 2pm | Wendy Dyer

BOARD ENGAGEMENT IN FUND DEVELOPMENT

The currently shifting funding environment requires that agencies be more strategic in their fundraising efforts to optimize their success. Although Board members (should) play a critical role in fundraising, many struggle to fully engage in the process and become effective fundraisers. Improving the Board's role in fundraising relies on having a proper infrastructure in place and providing members with the support and training needed to facilitate the process.

Part 1 outlines infrastructure that supports Board engagement, frames Board roles & responsibilities to develop/ maintain financial resources & provides insight on the importance of having a recruitment process that lays out expectations of fundraising and promotes overall engagement of Board members; Part 2 focuses on how to develop/add sizzle to your fundraising message to inspire – and invite - people to support your agency's key initiatives.

Special Instructions: Come prepared to: Part 1 - share insights, frustrations and successes regarding board involvement in resource development; and Part 2 – give/get peer input to help you refine your message and engage in mastering the courage to ask for a gift.

Target Audience: Board members, executive directors and directors of development

Learning Objectives:

- Advance learning about the infrastructure needed to support the Board's role in fundraising (P1)
- Gain understanding about the Board's role and responsibilities to develop and maintain financial resources (P1)
- Improve knowledge about strategies to help Board members be more engaged and effective in fundraising (P1)
- Create Impact Statements and other messaging tools and explore ways to maximize your messaging (P2)
- Advance ability to overcome the fear of asking for gifts by getting comfortable with 10 seconds of courage (P2)

Key Concepts:

- Infrastructure that supports Board member engagement in fundraising efforts.
- Roles and responsibilities of Board members in fundraising for the agency.
- Donor reception is heightened by askers effectively balancing emotion with data & statistics in their fundraising efforts.
- The importance of portraying the people you serve in a positive light.

Concept Application/Small Group Exercises:

Participants will: P1) create a personal board member development plan and personal case for support; P2) - create individualized Impact Statements for peer review and engage in role playing to schedule visits and ask for a gift.

Racial Equity Lens Application: When identifying, recruiting and engaging Board members, consider real or perceived apprehension about fulfilling the desire/need for board members with ability to fundraise and for a board with racial diversity

Major Take-Aways by Participants: (1) Engage with Board members one-on-one to set expectations; provide training, incorporate accountability; use a roadmap to Board fundraising; (2) Invest time in Board development; be intentional about recruiting & onboarding; utilize a Board Development Committee; strengthen Board connection to mission/programs; (3) Craft messaging using a story structure, plan script, timeline to follow up, be specific about impact, use anger not pity in stories; be donor centric; ask donors what they want; use the messaging tool kit.

Key Concepts in Common with Other Sessions

Series #2 Financial Health; Series #4 Financial Sustainability; Series #7 Innovation; Series #8 Vision/Strategic Direction.

About the Presenters

Pete Werner has served in multiple capacities in the nonprofit sector since 1994, focusing on grant making, fundraising, board development and operational effectiveness. He has served as an adjunct professor at The Brown School of Social Work and is active on local nonprofit boards. Wendy Dyer has enjoyed serving the nonprofit sector as a consultant for 24 years. Working as a team member, she has helped to expand programs, build schools, cultural and health centers, bringing opportunity to thousands of people in need.