



Agenda Overview

- What's the Ideal? What Gets in the Way?
- Foundations: Role Clarity, Defining Success
- Five High-Impact Roles for Board Members... and the staff who love them
- The Portfolio Approach
- **Q&A throughout!**



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Common Issues

Transactions

“Cricketts”

“Ask back”

Isn't that why YOU are here?

Over-promise / Under-deliver

Fear. Plain old fear.



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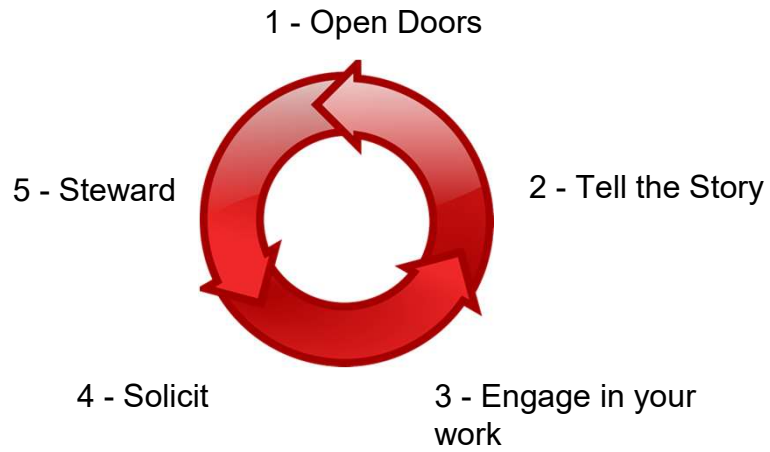
Who Does It?

1. Overarching strategy, priorities for budget & revenue goals
2. Creates the revenue goals
3. Advises on revenue goal & affirms the budget
4. Writes the fund development plan
5. Reviews, feedback on fund development plan, presents it to the board
6. Communicates fund development expectations, solicits all potential board members BEFORE inviting them onto the board
7. Determines the dashboard for FD reporting
8. Opens doors to new potential donors
9. Tells the story of your organization
10. Engages donors in your work
11. Solicits donors
12. Stewards donors



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Five High-Impact, Donor-Centric Activities



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OPENING DOORS

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Work From What You Do...

- Best sources of donors?
- Where could you have leverage in the community?
- Individual board member assets and networks?



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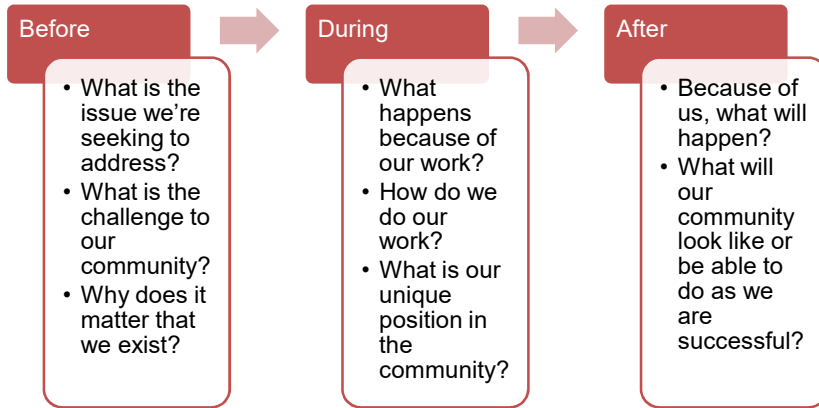


SHARING THE STORY

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Owning Your Own Story



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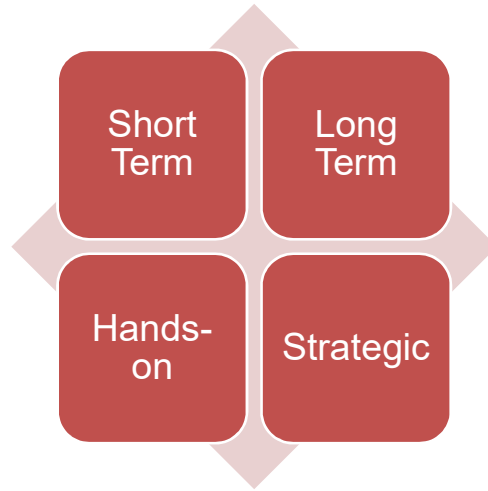


ENGAGING ALONG THE WAY



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Engagement Inventory



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SOLICITING

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Solicitation Success for Everyone

- Events
- Appeals
- Partnering on visits
- Prioritizing DURABLE RELATIONSHIPS



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STEWARDSHIP



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Donor Retention.



First time

31.8%



Repeat

64%



Monthly

90%+

"Fundraising Effectiveness Project" – afpnet.org

When a board member reaches out:

- Retention = 70%
- 40% increase in amount

Penelope Burk, "Donor Centric Fundraising"



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Take a look...

The Board Fund Development Plan Template

Email me: lgoodwin@girlsinc.org
for a copy!



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The Portfolio Approach

- Focus on 5-7 relationships
 - Individuals, Corporate or Foundation
 - Known or new to you
- Strategic, multi-step approach to building an on-going relationship
- Work with staff, with other board members to develop & implement a plan



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What's Next?

- Courageous conversations on roles
- Table host at acquisition event
- Build in story development & practice @ board meeting
- Create inventory of engagement opportunities
- Proactive stewardship plan for post-event
- New Donor board calls
- Board Fund Development plan
- Celebrate success specifically
- Consider the power of force multipliers
- ***What commitment are you making to yourself?***



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**WITH YOU
IN HER CORNER,**
SHE WILL CHANGE THE WORLD.

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