

*Build Your Board  
Into a  
Championship Fundraising Team*



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# AGENDA

- The Giving Landscape
- Board's Role in Fundraising
- A role for every team member!
- Ethics and Fundraising
- Measuring fundraising effectiveness



# WARMUPS!



# FUNDRAISING

- “Fundraising is the gentle art of teaching the joy of giving.”
  - Henry Rosso, Founder, Center on Philanthropy



**LILLY FAMILY  
SCHOOL OF PHILANTHROPY**

INDIANA UNIVERSITY

IUPUI



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# SQUARE PEG IN ROUND HOLE



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# *GIVING USA 2018 HIGHLIGHTS*

- \$427.71 billion
- While total charitable giving rose 0.7%, when adjusted for inflation, total giving declined 1.7%.
- Individual giving declined from 70% in 2017 to 68% in 2018.
- While giving to international affairs and environment/animal organizations increased (9.6% and 3.6% respectively), giving decreased to religion (1.5%), education (1.3%), and public-society benefit organizations (3.7%).



# *KEY ROLES OF THE BOARD*

- Set organizational direction
- Provide oversight
- Ensure adequate resources



# *“ENSURE ADEQUATE RESOURCES”*

- With Ethics
- With Vision
- With Effort





# BOARD RATINGS

How current boards rate themselves on the ten basic responsibilities:

	Responsibility	CEO	Chair
	Mission	A-	A-
	Financial Oversight	B+	B+
	Legal/Ethical Oversight	B+	B+
	CEO Support	B	B+
	Strategy	B-	B
	CEO Evaluation	B-	B
	Monitors Performance	B-	B
	Community Relations	C+	C+
	Board Composition	C	C+
	Fundraising	C	C

Source: BoardSource.org, 2016



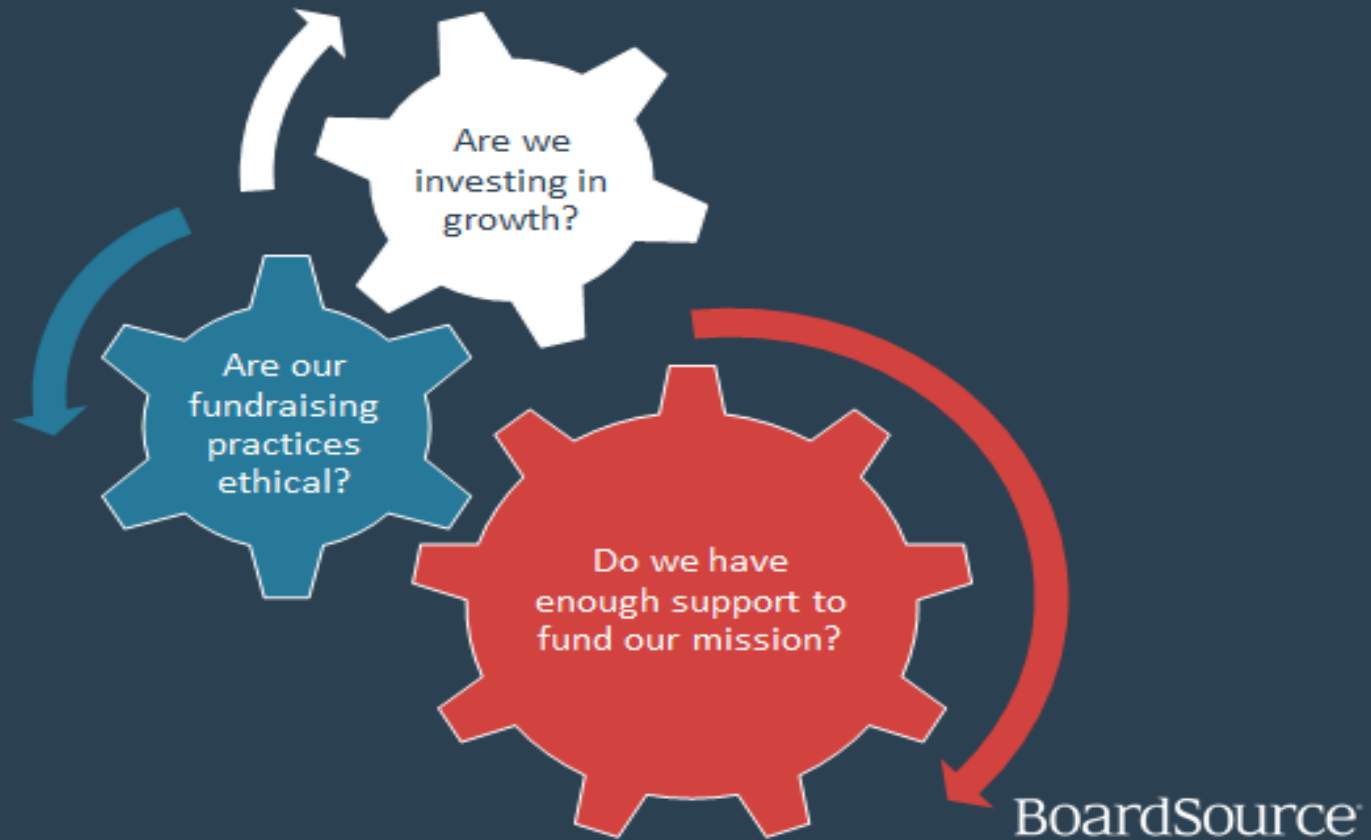
# STARTING POINT: BOARD GIVING

- Demonstrates personal commitment
- Encourages other funders to give
- Creates board member “ownership”



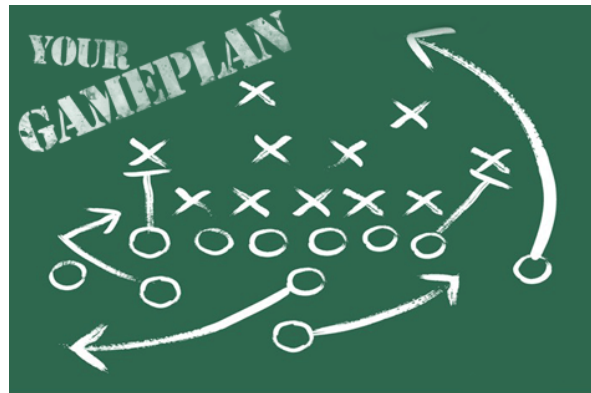
# STRATEGY

That means tackling these big questions:



# OUR GAMEPLAN FOR SUCCESS

- Build the team
- Train the team
- Assess the team
- Put each team member in position to succeed
- Coach the team
- Evaluate the team



# BOARD/CEO/DEVELOPMENT TEAM



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# *DEFINE THE CHALLENGES*



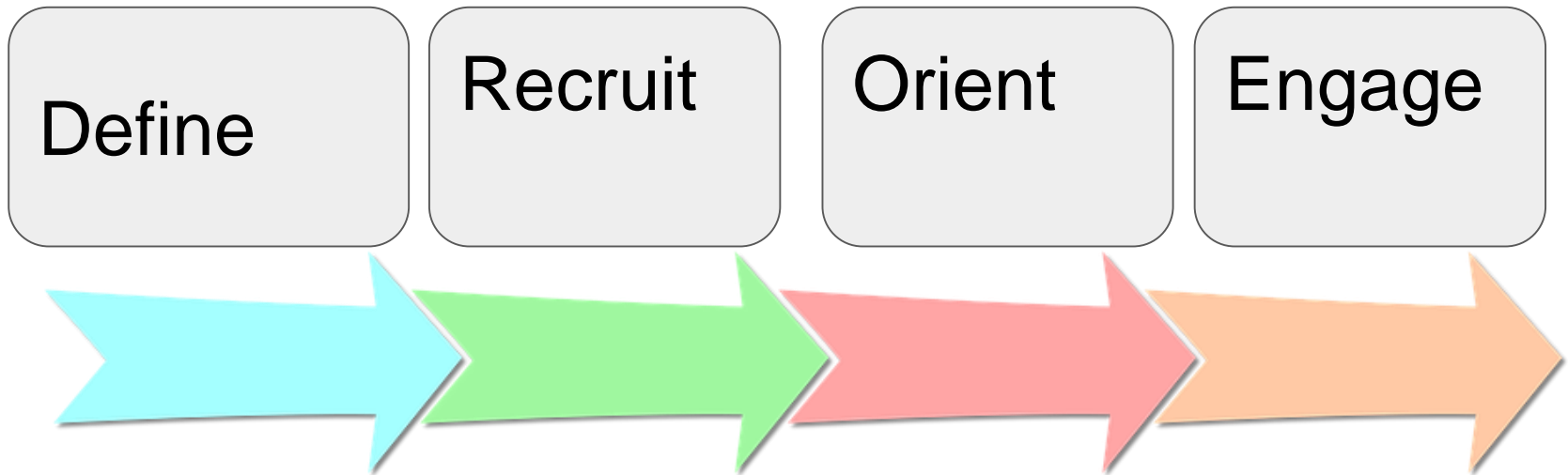
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# REMEMBER WHEN...



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# ***BUILDING THE TEAM***





# *DEFINING EXPECTATIONS*

- What do you expect?
- How will they be supported?
- How will they be held accountable?



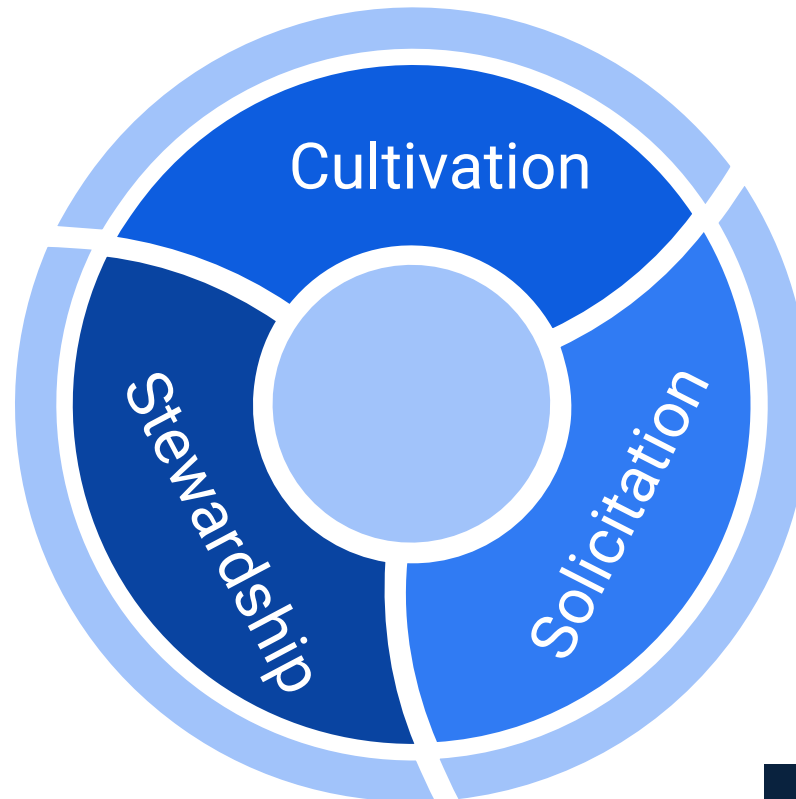
# #DIDYOUKNOW

- When fundraising expectations **are** clearly articulated during recruitment, 52% of CEOs report their boards are actively engaged in the organization's fundraising efforts.
- When fundraising expectations **are not** clearly articulated during recruitment, only 12% of executives report that their boards are actively engaged in fundraising efforts.



# RECRUIT STRATEGICALLY

- There are 3 stages of fundraising and all are important!



# #DIDYOUKNOW

- Only **31%** of CEOs and **19%** of Board Chairs assign a high priority to fundraising responsibilities when recruiting new members
- **72%** of CEOs believe that board diversity is very important to increasing fundraising or expanding donor networks, yet the majority of Board Chairs and CEOs do not report demographic diversity as a high priority in board recruitment



# ORIENT FOR SUCCESS

- To succeed in fundraising, your Board must know five things:
  - The mission of the organization
  - The goals of the organization
  - The dream
  - How to manage fear and rejection
    - Most importantly....
      - ***HOW TO LISTEN***



# *ETHICS AND ACCOUNTABILITY*

- Gift acceptance policy
- Who will you take money from?
- Who will you not take money from?



# *IT'S GO TIME!*

- Assess
  - THEN
- Engage



# *CULTIVATION*

- Provide names
- Make contact
- Give a tour
- Share the history and mission
- Host “friendraisers”





# *SOLICITATION*

- Personal notes
- Invite friends and colleagues
- Focus on results, not needs
- What would the community look like without \_\_\_\_\_?



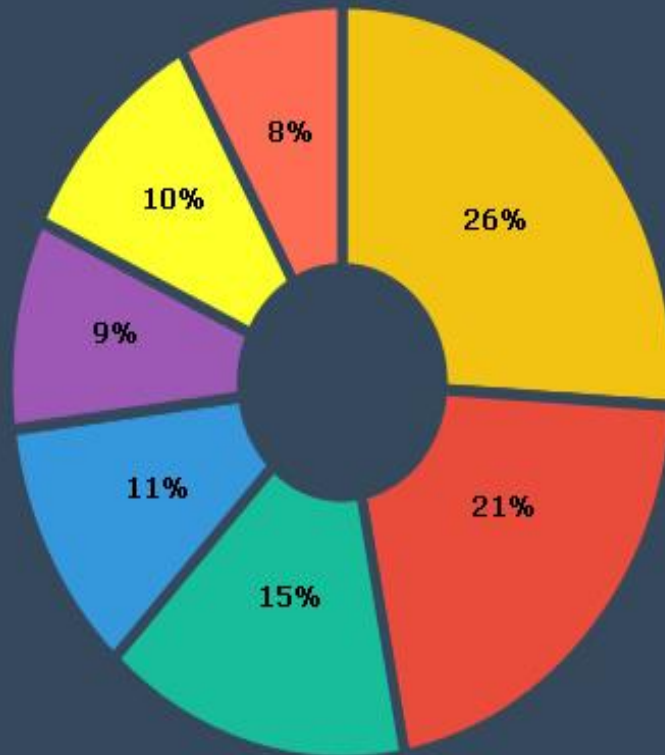
# STEWARDSHIP

- Thank you!
- Donor recognition opportunities
- Updates



# 7 FACES OF PHILANTHROPY

## The Seven Faces of Philanthropy



- The Communitarians: Doing Good Makes Sense
- The Devout: Doing Good Is God's Will
- The Investor: Doing Good Is Good Business
- The Socialite: Doing Good Is Fun
- The Altruist: Doing Good Feels Right
- The Repayer: Doing Good in Return
- The Dynast: Doing Good Is a Family Tradition

Source: BoardSource



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# *WHY PEOPLE DON'T GIVE*

- Solicitation is infrequent or poorly communicated
- They don't see how their gift would make a difference
- They never feel wanted or needed
- They receive no direct, personalized appeal
- They gave an unacknowledged gift in the past
- They were not asked to give
- The timing wasn't right
- The organization's mission was not compelling



# MEETINGS REFLECT PRIORITIES

- Celebrate progress
- Discuss challenges
- Brainstorm solutions
- Identify and commit to next steps



# The Three Most Important Measures of Fundraising Effectiveness

- **Total Fundraising Net:**  
Are we raising enough money to fund our mission now and in the future?
- **Dependency Quotient:**  
To what extent are we dependent on a small number of large-scale donations?
- **Cost of Fundraising:**  
How efficiently are we raising funds, and are our overall efforts achieving high return on investment?

BoardSource®



# HEALTHY FUNDRAISING



# *MEANINGFUL MESSAGE*

- What it is:
  - Your “why”
  - Unique to you
  - What makes you light up
  
- What it is NOT:
  - Elevator pitch
  - Same for everyone
  - Regurgitation of mission and strategic plan





# *PARTING TIPS*

- Like volleyball, we are all in, and everyone has a role
- Focus on relationships, not soliciting
- Discuss progress at every meeting
- The importance of teams
- Celebrate *progress together*



# QUESTIONS?



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# THANK YOU!

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