MAKING THE ASK, FUNDRAISING WITH BOARDS AND PLANNING GREAT EVENTS
SESSION #3
FRAMING

How this training was developed:

- Research, best practices, experience, learning, feedback, coaching and observations

Individual Experience:

- Doctorate in Education from Pepperdine University
- Background in adult education, refugee agency & international development, leadership development programs, volunteer management and curriculum development
- Director of Nonprofit Learning Lab

30 SECOND CHECK IN: SHARE IN ZOOM GROUP CHAT

How do you feel about asking people for donations?
Examples: I love it OR I need practice OR I need to do it more!
HOW WE CAN LEARN TOGETHER

Recordings, handouts & slides will be emailed to you

Use the Zoom Group Chat: Questions and comments 🙋

Tech support? Connect with “Tech Support”

Breakout rooms: Reflect, Process, Create & Ideate
LEARNING OBJECTIVES

WHAT WE WILL COVER THIS SESSION:

- Understand how to make an ask
- Develop a script to practice your ask
- Explore ways to build out a board or volunteers that are willing to fundraise
- How to use events to gather support for your cause
- Best practices in organizing fundraising events for small grassroots organizations
HOW TO PREPARE FOR A PHONE CALL
WHY WE MAKE CALLS

- To thank donors and volunteers
- To build relationships & learn about donors
- To check-in & steward
- So donors remember your organization!
TYPES OF CALLS

- Thank you calls
- Discovery calls
- Fundraising calls
- Cold Calls
- Introductions
- Event Tickets
- Annual campaign
- Volunteer With Us
Always have a script

- Helps you know what to say and reminds you of the why for volunteers or donors.
- A script helps you prepare and know what to say in the awkward moments.
- Training for volunteers and committees
- A script gives you extra power and practice!
- Never do a call without a plan for how to handle the awkward moments
BEST TIME TO CALL

Remember

Who is the person you are calling? What are their priorities?

Where do they live? What is their time zone?

8 am – 10 am
1 pm – 3 pm
4 pm – 6 pm
Sample scripts to help you prepare
Sample Script

The Essentials

• Use the person’s name
• Share your name and connection [if they don’t know you]
• Tell them what you are doing
• Ask questions
• See if they want to get involved or donate
SPEND TIME GETTING TO KNOW DONORS BY ASKING QUESTIONS

- How are you doing?
- Tell me about the first time you volunteered with us...
- How did you get involved?
- What interests you most about our organization?
- How has your volunteer experience been with us?
SPEND TIME GETTING TO KNOW DONORS BY ASKING QUESTIONS

• Are you interested in getting more involved with our organization?
• What you like to attend our ...
• What motivated you to give your first gift?
• How is your family?
• In what ways could we involve your friends and family in our cause
The awkward moments...

- Can I give you a call back [next week?]
- So sorry to interrupt, I will give you a call back next week
- You provided your phone number to us when you made your last donation
- Thank you so much for your feedback.
WHAT TO TALK ABOUT...

- Make sure calls align with goals
- Remember your fundraising plan
- Stay focused on the why
- Calls should align with what you are trying to accomplish
LET'S PRACTICE

- I need one volunteer who feels comfortable talking out loud in front of the group and talking to me about your volunteer experience.
HOW TO GIVE FEEDBACK?

- What did you like?
- What do you want to hear more about?
- Take notes
- Listen for what you like
ELEVATOR PITCH

- Tell me why I should get involved
  - What projects are you working on right now?
  - What initiatives are you doing that involve the community
  - How does what you are doing connect to my interests
  - What do you love about being a volunteer?
- Can you get me to yes in 15 seconds?
**NOW YOU: HEAD TO BREAK OUT**

<table>
<thead>
<tr>
<th>Name</th>
<th>Role &amp; Organization</th>
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Everyone draft and practice their script. Include:

- Your connection to the organization
- What is the latest and greatest?
- What is your ask and why does that matter to the person you are asking? The personal connection.

9 Minutes

Be on camera

Scribe & Leader
GETTING COMFORTABLE WITH FUNDRAISING

- Practice, practice and practice
- Share stories and the why
- Make it personal
- Train your active volunteers and board members to get comfortable with doing an ask
- Believe in the work that you are doing
BOARDS AND FUNDRAISING
What is the purpose of your board? What do you need them to do? This needs to be defined by YOU and the board!

- Types of Boards:
  - Governance Board
  - Working Board
  - Mixed Model
NOW YOU: DO A QUICK POLL

What is your board model...
SELECT ALL THAT APPLY

- Governance Board
- Working Board
- Mixed Model
- We have a fiscal sponsor
YOUR BOARD

Boards Responsibilities:

- Understanding the programs
- Financial Analysis
- Risk assessment
- Strategic Planning

- Review of leadership
- Equity and Inclusion
- Fundraising
- Advocates
NOW YOU: DO A QUICK POLL

Which areas of board responsibilities do you need to improve...
SELECT ALL THAT APPLY

- Equity and Inclusion
- Understanding programs
- Fundraising
- Financial Analysis
- Being an advocate
- Risk assessment
- Strategic Planning
- Fundraising
ENSURING RESOURCES

If the board ensures resources for the nonprofit then they:

- Identify resources needed
- Establish policies for how resources will be acquired
- Determine how board members will participate in fundraising
WHAT CAN GIVING LOOK LIKE IN A BOARD?

- Understand and be passionate about the work of the organization
- Make a personally meaningful donation
- Provides resources to the organization and willing to talk about it and advocate for it to secure financial resources
- Assist with the development and implement of fundraising plans
- Participate in donors asks
- Help with fundraising campaigns
GIVE OR GET

- Give: personally give
- Get: personally do the work to get the funds
- $250 - $1,000
- This information is made clear to board members prior to board commitment
- Transparency in giving requirements and expectations
CREATE BOARD AGREEMENTS THAT RESONATE WITH BOARD MEMBERS

- I will give what is for me a personally generous annual donation.
- I will actively promote the organization in the community and encourage and support its staff.
- I will actively participate in fundraising in whatever ways are best suited for me and agreed on with those in charge of the organization’s fundraising.
GETTING BOARDS MEMBERS COMFORTABLE WITH FUNDRAISING

- Practice
- Provide scripts
- Board members should help set goals so there is shared accountability
MOVING FORWARD

- What makes sense for your organization?
- How will you decide what you are going to do?
- How can decisions align with fundraising plan and organizational goals?
5 MINUTE BREAK
EXPLORE WAYS TO BUILD YOUR FUNDRAISING BOARD
WHO TYPICALLY VOLUNTEERS TO FUNDRIASE FOR A NONPROFIT

- People with a strong affinity
- Current volunteers
- Alumni
- Board members

- Program participants
- Parents
- People impacted by your mission
CREATE THE STRUCTURE FOR PEOPLE TO FUNDRAISE

- Build in the structure for fundraising to happen in your organization beyond just the board members
- Need a willing group of people
- Not everyone is comfortable with fundraising
- Takes time to train and build culture of giving
CREATE THE STRUCTURE FOR PEOPLE TO FUNDRAISE

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TYPES OF COMMITTEES

- Fundraising Committee
- Gala Committee
- Events Committee
- Sponsorship Committee
HOW TO STRUCTURE

Serve at the pleasure of the organization

Organization determines:

- Goals
- Tasks
- Meeting Structure
- Committee Lead
- Size of committee
- Length of service
COMMITTEES

- Builds a leadership pipeline for your organization
- Committee members can train other committee members
- The tasks committees complete should help not impede organizational progress
THE VOLUNTEERS YOU RECRUIT

Help with....

- Peer to Peer Fundraising
- Serving on Leadership Committees
- Training other volunteers
- Serving on affinity groups
HOW TO RECRUIT

Tap into your core volunteers

Share on your channels about how to serve

Ask volunteers to "bring a friend" to serve on committee

Recruitment meetings "twice a year" for new volunteers to serve
NOW YOU: DO A QUICK POLL

What is your people power capacity? SELECT ALL THAT APPLY

- We have paid staff (3+ or more)
- We have limited part time staff
- We have active committees led by volunteers
- We have an active board of directors that give of their time and talents
- We feel a bit tapped out right now

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How do your boards feel about fundraising? What is the culture of board giving in your organization? How can you develop fundraising expectations that are in alignment with your board members? What conversations does your organization have about board giving?
USE THE SCRIPTS: BUILDING RELATIONSHIPS THROUGH ASKS
BUILD A RELATIONSHIP

- Understand your donors and volunteers’ preferences when engaging. How do they respond?
  - Phone Call
  - Email
  - Direct email
  - Meeting
  - Community Events
  - Outdoor Experiences
STRIVE TO GET BETTER INFORMATION

- Phone Numbers
- Email Address
- Birthdates
- Mailing Addresses
- Clean and update your database
- Does your CRM and donation platform integrate?
PHONE BANK

Get volunteers involved to connect with the community to achieve your fundraising goals

- Theme the phone banking
- Choose 1 day a quarter
- Create goals
- Give volunteers scripts
PHONE BANK

Events:
Reach out to your lists to promote upcoming events and thank them for their past involvement. This helps strengthen connection with past volunteers and donors.

End of year campaign
Reconnect with donors and your list to generate interest and your ability to ask individuals for donations at the end of the year.

Volunteer Initiative
Call volunteers to re-engage them and let them know about upcoming opportunities.
EVENTS

info@nonprofitlearninglab.org | 720-432-9107
WHY EVENTS ARE BENEFICIAL FOR GRASSROOTS ORGANIZATIONS

- Promotes your programs
- Helps you recruit more volunteers
- Builds community which can build donor base
- Highlights mission
- Build your base of supporters
REMINDERS WHEN PLANNING EVENTS

- It takes work
- Plan in advance and have a point person
- Delegate out tasks
- Use a Run of Show
- Don’t expect everyone to follow through
- 1000 invites = 100 people
# WHAT TO INCLUDE IN A ROS

<table>
<thead>
<tr>
<th>What</th>
<th>When</th>
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<tbody>
<tr>
<td>Set up / breakdown</td>
<td>Start and end time</td>
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<tr>
<td>Volunteer Training</td>
<td>Deadlines to complete tasks</td>
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<tr>
<td>Main Activity</td>
<td>Minute by minute event timeline</td>
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<tr>
<td>Sound Checks</td>
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<tr>
<td>Vendor Activity</td>
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<td>AV and lighting</td>
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<tr>
<td>Action Items</td>
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<td>Food and Beverage</td>
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</table>
WHAT TO INCLUDE IN A ROS

Who
- Staff or volunteers
- Emcee
- Sponsors
- Vendors
- Partners
- VIPs

Where & How
- Floor plan or diagram
- Venue address
- Supplies needed
- Phone numbers
- Event Promotion timeline
Examples of Events for Grassroots or Rural Organizations

- Phantom Event
- No show chicken dinner
- Soup Night
- Park or Land Tours
- Camera & Photo Taking Workshop
How to get volunteers involved in events

- Logistics
- Marketing
- Phone banking

- Sponsors
- Day of event support
- Follow up post event
No Show Chicken Dinner

- Ask volunteers to give 3-5 names of people that will donate
  - Family
  - Neighbors
  - Friends
  - Coworkers
  - People in their faith groups

- Create a nice invitation, professionally printed on nice paper
- Hand address envelopes
- List board members on the invitation so recipients donate
- Printing and postage: $250
- Net profit: $1,600 - $2500
- Every other year strategy
Park or Land Tour

- Showcase the beauty of the natural land
- Organize a nature hike or natured learning experience on the land you are trying to protect
- Donation based or flat fee
- Curated outdoor event for a young professional group or business
Headshots & Hashbrowns

• Have access to a great outdoor space and a photographer?
• Brunch and headshots
• Venue: indoor or outdoor location
• Fee: $25 (no headshot) - $100 (headshot)
• **Logistics:** 2-3 hour event with spreadsheet of 15 minute slots for headshots
• Way to go outside your community for folks needing a service
KEY PERFORMANCE INDICATORS

- Standards that measure how strategy is working
- Set KPIs for planning events
- Track what is working to share data
- Determine what was successful with the strategy because you have a limited amount of time. Do what works!
DETERMINE COST PER DOLLAR RAISED

- Divide expenses by revenue
- If expenses and revenue are equal, calculation will = 1, so for every $1 you spent, you brought in $1—you broke even.

How to evaluate CPDR:
- Event costs $500 to plan (food + beverages + donated space)
- You raised $2,500 at the event.
- You made money!
- $500/$2,500 = 0.20
- For every 1$ raised, you spent $0.20.
FUNDRAISING RETURN ON INVESTMENT

- Determines success or failure of a campaign
- Divide revenue by expenses
- The number tells you how much you earned per dollar spent
- A number greater than 1 means profit
- A number less than 1 means a loss
WHICH METRIC TO USE?

If cost-cutting is a priority, nonprofits would likely be more interested in CPDR.

If strategic planning for future fundraising efforts is the focus, fundraising ROI would be preferred.
REMINDERS

Don’t compare yourself to other organizations. Do what makes sense for your goals, capacity and volunteer base.

- Practice
- Align with the board
- Create structure
- Simple events that you can do!
QUESTIONS?

ASK AWAY!

CLOSING TIME

- What is one thing you learned today that you will try to implement?
Thank you

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