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Fundraising for Academic Leaders Webinar Series
**Building Program Champions
In Higher Education**
February 27, 2020



Moderator

Christine Kim

*Intern Coordinator
Sanford Institute of Philanthropy*



fund•raise

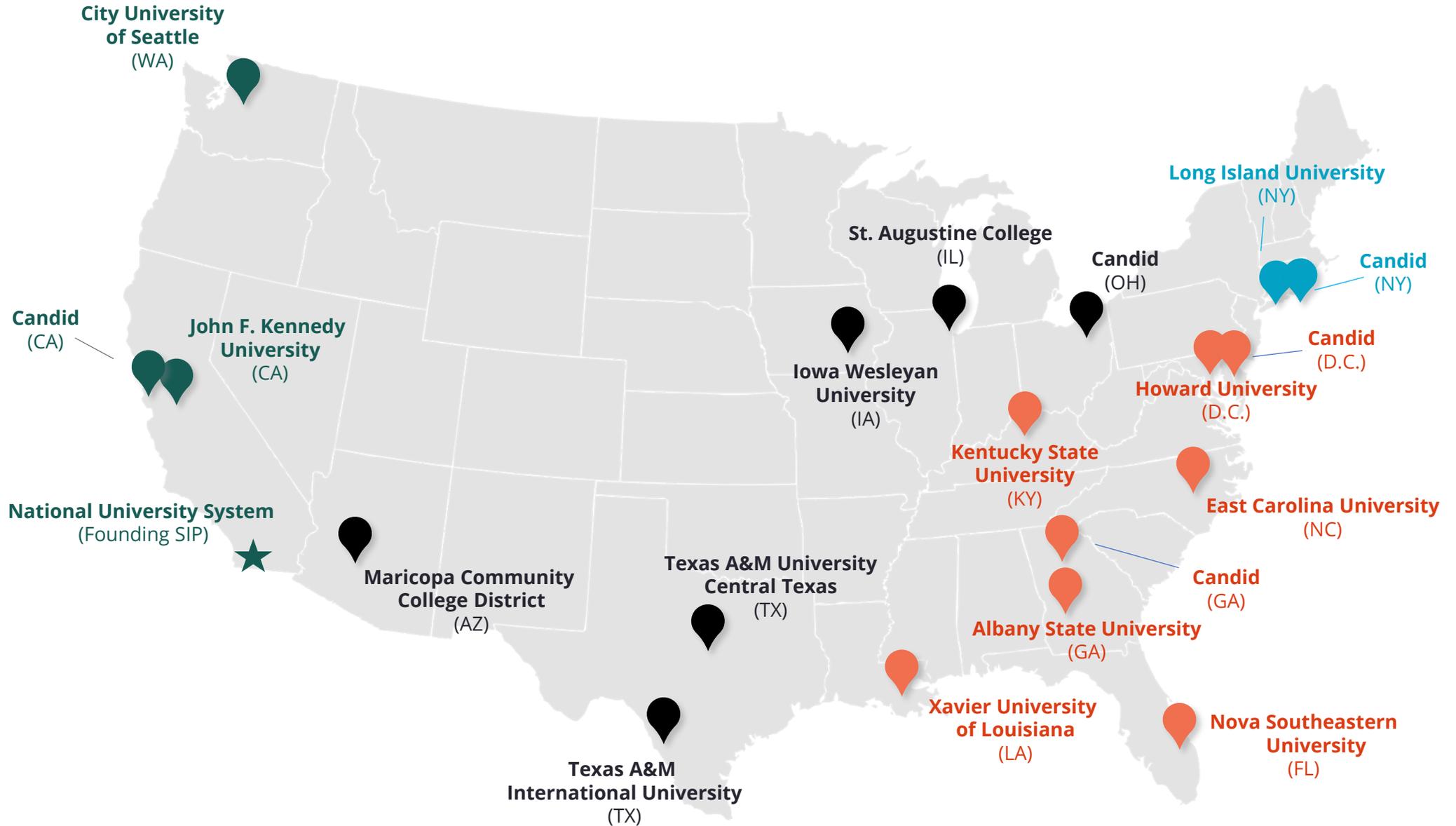
YOU'VE GOT A CAUSE.
LEARN HOW TO **FUND IT.**

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TODAY'S PRESENTER:

Kathy Drucquer Duff, CFRE

Founder

KDD Philanthropy, Inc



AGENDA

- Advisory Boards: **A Discussion**
- Critical components for **Volunteer** Leadership
- Considerations for a **Champion Model**
- Where to **Start**
- **Next Steps**



REFLECTION

“Everyone has the **fire**, but the **champions** know when to ignite the **spark**”

- Unknown

REFLECTION

“**Everyone else** has a board, so we need one too”

- Academic and Nonprofit leaders everywhere

MYTH: YOU NEED AN ADVISORY BOARD, NO MATTER WHAT

FACT: A philanthropy-focused board can be effective when members are both **personally generous** and **willing/able** to participate in introducing **other potential donors** to your cause and engaging them.

However, without a clear dedication to fundraising, these groups are often a huge investment of time with little philanthropic return.

COMMUNITY FORUM:

Should someone be asked to join a board if they **have not** made a gift to your organization?

How do **you** as a leader talk about **philanthropy**?

If you do not talk **openly** about philanthropy and **its importance** to your program...

you **cannot** expect your board members or champions to talk about giving/philanthropy.

RE-VISIT: **Asking** versus **Inviting**

Inviting others is much more *specific* and *tangible*.

When you **believe** deeply in your **cause** and the institution's **mission**, inviting others to become more involved becomes a *joyful activity*.

Key Considerations

Before you start recruiting new board members or new champions, it's essential to identify two things:

1. What do you need your board/champion to **look like**?

Composition and skill sets

2. How do you want your board/champion to support **fundraising**?

BEST PRACTICE: Board Role

Make a **personal annual gift** to an initiative that **you care deeply about**

- If board members don't support your nonprofit financially, then why should anybody else?
- The gift can be **large or small**. It must be **meaningful** to that Board member and something that they are proud of.

Empower Your Champions for Success

- Ensure they understand **why** philanthropy is important to your organization.
- Annual Development Plan: *help your board understand:*
 - Your fundraising goals
 - Trends
 - How your multi-channel activities work together
 - where they can be involved
- Progress Reports: call out specific ways **they can help.**

Empower Your Champions for Success

1. Demystify fundraising!

Offer fundraising training/coaching/conversations.

2. How can they be most helpful?

Explore their talents and availability.

3. What will their fundraising involvement be?

Meet individually with board members each year to plan their fundraising involvement.

4. What staff support do they need?

Confirm needed staff support to help them do their board duties **most effectively**.

The Great Debate:

Do you set a minimum gift level expectation for your board?

A person's hands are holding a white notepad with a spiral binding at the top. On the notepad, a large, hand-drawn question mark is visible. The background is a blurred outdoor scene with a body of water and a sky. The entire image has a light teal overlay.

COMMUNITY FORUM:

Why is **100% Board** participation important?

Be Honest

- There may be some members who will **never** step into their fundraising **role** as you would like them to do

If that's the case →

Can that volunteer be useful
in **other ways?**

or

Is it time to **thank and
release** them?

Talking About Your Mission

Every board member/champion must be able to speak about your organization in a meaningful and compelling way:

- Serve as a champion for your cause. Know their own elevator speech.
- *This is a great exercise to do with your boards/champions!*

Raising **Money** Together

What does engagement look like?

- Personal philanthropic commitment (stretch)
- Talking about your Board affiliation
- Pride in programs
- Role Modeling
- Asking/Inviting “to learn more”
- Overviews
- Philanthropic Introductions



Raising **Philanthropy** Together



- Salon Events
- Tours
- Signing of invites, emails & letters
- Peer screenings
- Committee/Board recruitment

The Champion Model:

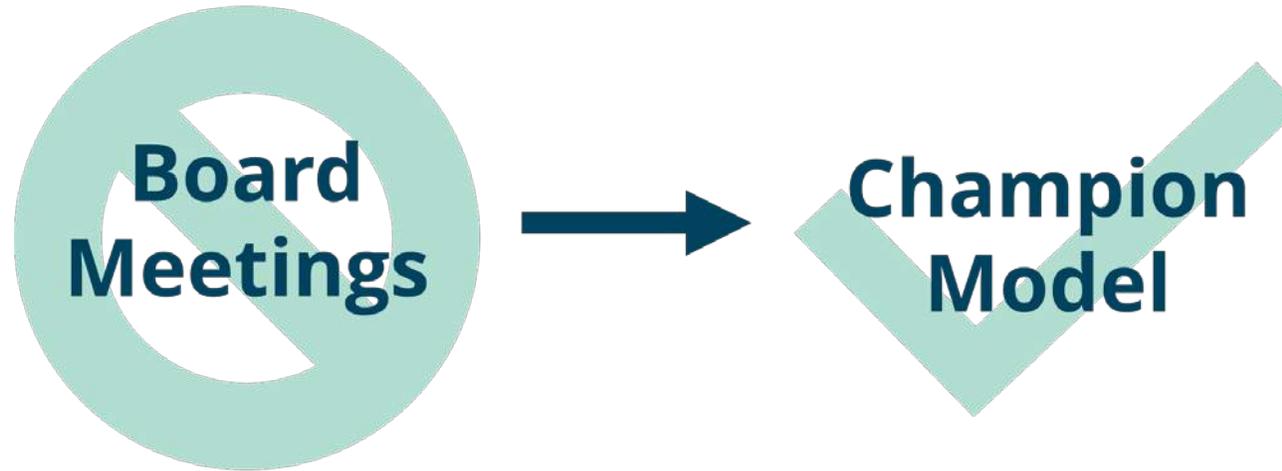
*Partnering with someone who
is passionate about your
cause to serve as a connector,
a conduit, a role model*

Harsh Reality

- Average Board meeting: **40-100 hours** of dedicated staff time
- Average 1:1 meeting: **3 hours**
 - *Setting, planning, conducting and follow-up*

You could conduct 13-33 champion meetings in exchange for one Board meeting.

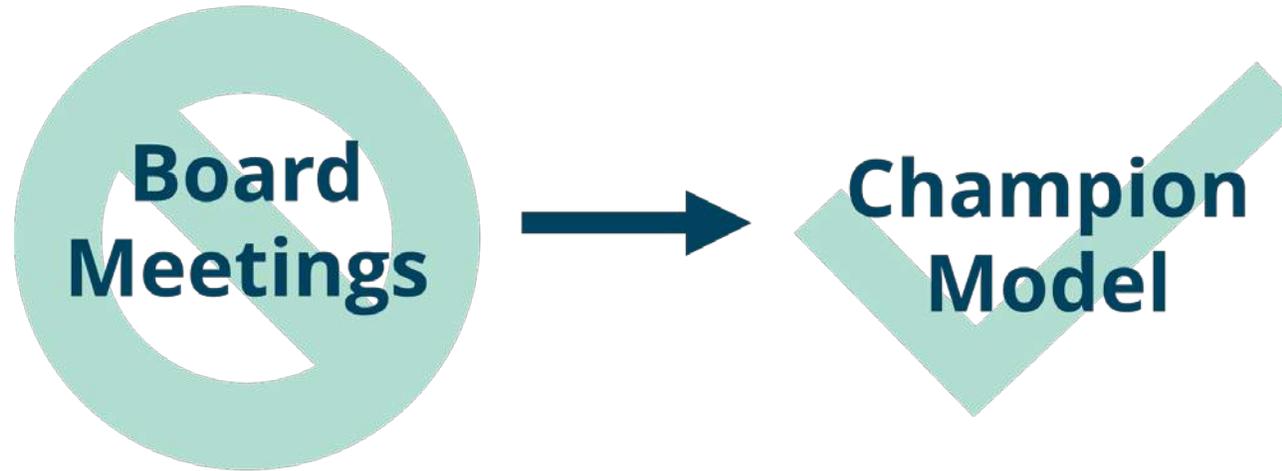
Could you Envision...



A State Of The Organization/Unit Meeting?

- *Share Most Important Trends*
- *Ignite Passion thru Progress*
- *Invite/Encourage Engagement/Commitment*

Could you Envision...



How would your time be utilized more effectively?

How would your Board Members' time be used more effectively?

What would the return on investment be for your organization?

Champion Model Job Description

1. **Dedicate 5-10 hours per quarter to your organization**
2. **2-3 Engagements per year**
 - Host a Salon Event
 - Make Introductions
 - Attend Key Events (and bring friends/colleagues/peers)
 - Participate in a peer screening
 - Make Thank You Calls or Write Thank You Notes
 - Serve as an Advocate
3. **Meet with key leadership**
4. **Attend Annual State of the Organization event**

Extending the **Right** Invitation

1. **Set expectations BEFORE they join your board or become a champion**
2. **Communicate how fundraising relates to the mission.**
3. **Train/educate your board members/champions.**
4. **Onboard your champions thoughtfully and intentionally.**
 - **Holistic, organic succession planning**
5. **Reframe fundraising as a board's fiscal responsibility**
6. **Remember: fundraising can be learned!**

Extending the **Right** Invitation

7. Don't neglect your introverts. They may become some of the best fundraisers with training/coaching.
8. Don't just focus on those with affluent connections; people-connecting skills are critical.
9. There's more to fundraising than the infamous "ask." That is only *one* part of the process.
10. Some people will never be good at asking, despite training. Help them find the right fit within an appropriate fundraising role.
11. Be aware of prospective members' other obligations before inviting them to the board.



CORE CONCEPT

Fundraising is important.

Create a **culture** that encourages your board of directors to **participate** and allows your mission to **grow** with your ambitions

REFLECTION

“If we want to make the biggest, most positive impact we can, **‘Do good on the largest possible scale,’** focusing our attention on our behaviors and activities that will reap the most significant rewards.”

- Jason McNeal

The Concept of Reset

How do you *manage* or *change* expectations when your board members may not even *know* that fundraising is one of their responsibilities?

The Concept of **Reset**

Work to get your board chair on board with embracing fundraising in their work.

- How do they speak about philanthropy and giving?
- How could they speak about philanthropy and giving?
- Is there alignment with your key initiatives?
- Is there alignment with their key motivations?
- Have they made a gift?

If one of your leading volunteers isn't actively supporting your organization, what message does that send?

Resetting

Review your board members' job description or bylaws.

- Is fundraising or giving as a responsibility clearly articulated?
- Are the philanthropic activities (engagement) that you would like each board member to engage in clearly spelled out?



Patience and Commitment

Manage your own expectations in this transition.

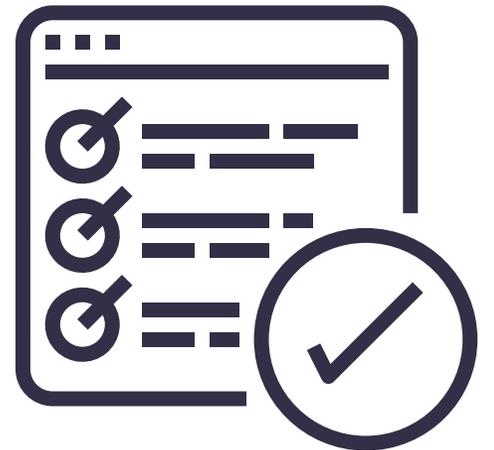
- It's unlikely you'll turn around your board's feelings about fundraising within one fiscal year.
- Expect baby steps.
- Set achievable goals for your board that will show their progress in accepting a new dimension to their volunteer leadership.



Accountability is Key

If you do not complete what you asked for, folks will wonder why.

- This has the potential to undermine all your good work.



How to Find Board Members/ Champions

- They self identify
- New donors
- Loyal donors
- Industry leaders
- New to community
- Give to similar causes
- Other?



**CORE
CONCEPT**

“People give, not because
we **have needs**, but
because we **meet needs**”

- Unknown

IMPORTANT REMINDERS

STUDY: AFTER RECEIVING A THANK-YOU CALL FROM A BOARD MEMBER:

- **93%** would definitely – or probably – give again **when asked next**
- **84%** would give a **larger** gift
- **74%** would give **indefinitely**

Share this data at your next board meeting, drop the mic, and see how they react.

If that isn't a wake-up call, I don't know what is.

CORE CONCEPT

Your board members or champions can be a huge help in **expanding** your donor network and **building new**, lifelong donor relationships for your organization – if you give them the **tools, training**, and **motivation** to do it the right way.

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COMMUNITY FORUM:

One Commitment

CLOSING REFLECTION

“Communicate your passion
clearly, concisely and with
genuine conviction.”

- Sir Richard Branson



Questions?

Please send them in the chat!





CONTACT

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Blog: www.kddphilanthropy.com



Book: Productive Conversations with Donors: A Handbook for Frontline Fundraisers





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