



Rachel
MUIR

**RECRUIT, TRAIN & MOTIVATE
BOARD MEMBERS TO FUNDRAISE**

June 25, 2021



Rachel Muir, CFRE

- Founder: Girlstart
- Featured on: Oprah,
- CNN, the Today Show
- AFP Outstanding Fundraiser of the Year
- What Rachel does: custom training, board retreats, online classes
- Weaknesses: chips, queso

 @rachelmuir

www.rachelmuir.com





Recruit, Train & Motivate Board Members to Fundraise

I brought party favors!



Download at www.rachelmuir.com/board

The Do's and Don'ts of Getting Boards to Fundraise

Why your board isn't fundraising and how to fix it

www.rachelmuir.com/board

GIRLS LEAD SAMPLE 2020 BOARD MEMBER PLAN

Thank you for stepping up as a board member to prepare girls for a lifetime of leadership! Your contributions as board member will build girls of courage, confidence and character who make the world a better place.

We don't take our mission (or your commitment) lightly. There's a lot to be done. We ask you to bring a positive fundraising attitude, your skills, time, and effort. While you're on our board we ask to be one of your top three charitable commitments. What can you expect from us? Training and support to be effective, a variety of engagement options to choose from and choice in how and when you give.

To accomplish this, we've crafted an "all you can eat" menu of philanthropic opportunities to give board members lots of variety in how you support our mission. Please select what interests you and we'll follow up accordingly. We encourage you to mark all the areas that interest you.

STEWARDSHIP

- Introduce myself as a Girls Lead Board Member at networking and community events.
- Write donor thank you cards (we'll give you sample scripts + materials)
- Call and thank donors (we'll give you sample scripts + donor information)

CULTIVATION

- Invite the Executive Director or Development Director as my guest at a community/business event.
- Serve as a table captain at the Inspire a Girl brunch and fill my table.
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- Introduce my company's leadership to the Executive Director or Development Director.
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- Post Girls Lead events to my social networks.
- Make a "personal treasure map" identifying 5-10 people to invite to: a free feel good cultivation event, Girls Lead activity, or breakfast/lunch/meeting with the Executive

Director or Development Director.

- Host event in my home to introduce Girls Lead to my network. Best month(s): _____
- Identify potential donors (individuals, organizations, business, etc.) and share their contact information with staff.
- Be assigned up to 3 major gift prospects to cultivate through personal visits and/or phone calls.

AMBASSADOR

- Be a greeter at the Inspire a Girl brunch.
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- Write personal notes to addressees on fundraising letters. (Sample notes might read "I hope you'll join me in supporting Girls Lead" and can be written on the top in ink or added with a post it note)
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- Use my social networking resources to ask to my contacts to give.
- Write personal emails and/or make personal phone calls to invite people to become donors.
- Serve on the Inspire a Girl "Sponsorship Committee" or "Champions/Host Committee" as a solicitor of sponsorships using my contacts or contacts provided to me.

Did we leave anything out? If you've got ideas for other ways you want to engage tell us here!

Thank you for your service!

Signature: _____ Date: _____

Chat in: Rate your board



Green – we are rocking and rolling


Yellow – we could use some fine tuning

Red – please send help

Get the slides -> www.rachelmuir.com/handouts

What's your board's experience level?



- 
1. At least a few board members are new to serving on a board.
2. 100% of our board members have prior board experience.



Poll: How often do you offer board training?

1. Once a year.
2. Every other year.
3. Every few years.
4. We don't offer it

Tips to support fundraising training

- Solicit board feedback on topics in self-evaluation
- Recruit guest speakers
- Team up with other orgs to invest in training
- Recruit high performing board members from other boards as guest speakers



Who you thought you were getting



Who you got



Where'd it all go wrong?



WHY RECRUITMENT, ONBOARDING & CULTIVATION

IS TOP PRIORITY

3 reasons why it's not working

- 1) Expectations of service not made clear in recruitment
- 2) They don't "know what they don't know" & haven't been trained
- 3) We forget they're volunteers & underestimate the support they need





**BE CLEAR & SPECIFIC ABOUT THEIR
FUNDRAISING ROLE**

“

You wouldn't hire a staff person without explaining the job and performance expectations in advance. The same holds true for recruiting board members.”

Simone Joyaux, Firing Lousy Board Members



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Is it...

Made clear in the board recruitment process?

Specified in the board contract?

Discussed in the board orientation?

Sample board member recruitment questions

1. Why are you interested in giving your time & talent to us?
2. What do you think are the characteristics of a great board member?
3. Fundraising is a part of board service. Can you tell us about your experiences with fundraising?
4. What skills, connections, resources and expertise are you willing to offer or use on the behalf of the organization?
5. What motivates you?
6. Are you willing to make us one of your top 3 philanthropic commitments with a stretch gift during your service?



Use a board member application

Nominee: _____

Nominator: _____

Relationship of nominee to Dogwood Alliance:

Occupation: _____

Employer: _____

Address: _____

Phone: _____

Email: _____

Do you support Dogwood Alliance's mission to protect Southern forests by engendering broad-based, diverse support for ending unsustainable industrial forestry practices? ☐ Yes ☐ No

Why do you feel passionately about Dogwood Alliance's mission to protect Southern forests?

What will you bring to the board? (i.e. skills, expertise, constituency representation, etc?)

Are you able to attend the board orientation during the second weekend of November? Participation is required of all new board members.

☐ Yes ☐ No

Would you be willing to consider Dogwood Alliance number one or two among the nonprofits that you support, in terms of your time and your financial support?

☐ Yes ☐ No

On what other boards do you serve?

Are you willing to raise funds for Dogwood Alliance, through whatever avenue you feel most comfortable (such as meetings or phone calls with donors, organizing events, tabling or giving presentations, etc)?

☐ Yes ☐ No

Will you participate in the Annual Seed Project by providing at least ten names of friends, family and colleagues? Dogwood Alliance will provide letters asking people to join for you to personalize by adding a handwritten note and send.

☐ Yes ☐ No

Are you willing to attend monthly meetings by phone all months except in person, weekend meetings in March and November that take place in Asheville and the membership meeting in July? Calls usually last one hour and are generally held in the evening.

What board members provide	What board members can expect in return
1. I will give my best effort to “hit the ground running” when beginning my service with the board.	1. The organization will provide me with a full orientation, including background information on work accomplished to date.
2. I will learn about the organization’s mission and programs, and be able to describe them accurately.	2. The organization will provide me with relevant materials and education.
3. I understand that the board meets ____ times per year, plus one annual full-day retreat. I will do my best to attend each meeting, with the understanding that three consecutive unexcused absences will be considered resignation from the board.	3. I expect that board meetings will be well run and productive, with a focus on decision-making and not merely reporting. I understand that agendas will be distributed at least one week in advance. If I wish to add items to the agenda, I will contact the chair at least two weeks in advance.
4. I accept fiduciary responsibility for the organization and will oversee its financial health and integrity.	4. I expect timely, accurate, and complete financial statements to be distributed at least quarterly, one week in advance of the relevant board meeting. I also expect to be trained to read and interpret these financial statements.
5. I will provide oversight to ensure that our programs run effectively.	5. I expect monthly reports from the executive director, program updates, news media, etc.
6. I accept ethical responsibility and will help to hold fellow board members and the executive director (and, by extension, the full staff) to professional standards.	6. The organization will provide me with relevant training.
7. I will serve as an ambassador to the community to educate others and promote our work.	7. I will need materials and may need training (public speaking, etc.) to do this job effectively.

Give them a
job
description



GIVE

TAKE

How to introduce fundraising expectations

Board members provide...

- Positive fundraising attitude
- Skills, time, effort
- Give generously – 1 of top 3 charitable commitments while on the board

What you can expect in return...

- Training & support to be effective
- Engagement options (fundraising menu)
- Choice in how and when you give (online, monthly installments, events, etc)

Pick the person who has everyone's ear



She has time + passion

CEO – lacks time



Board member motivation is different

Tips on Recruiting Board Members

What do your board members want to get out of volunteering? How often do you ask?

Is it...

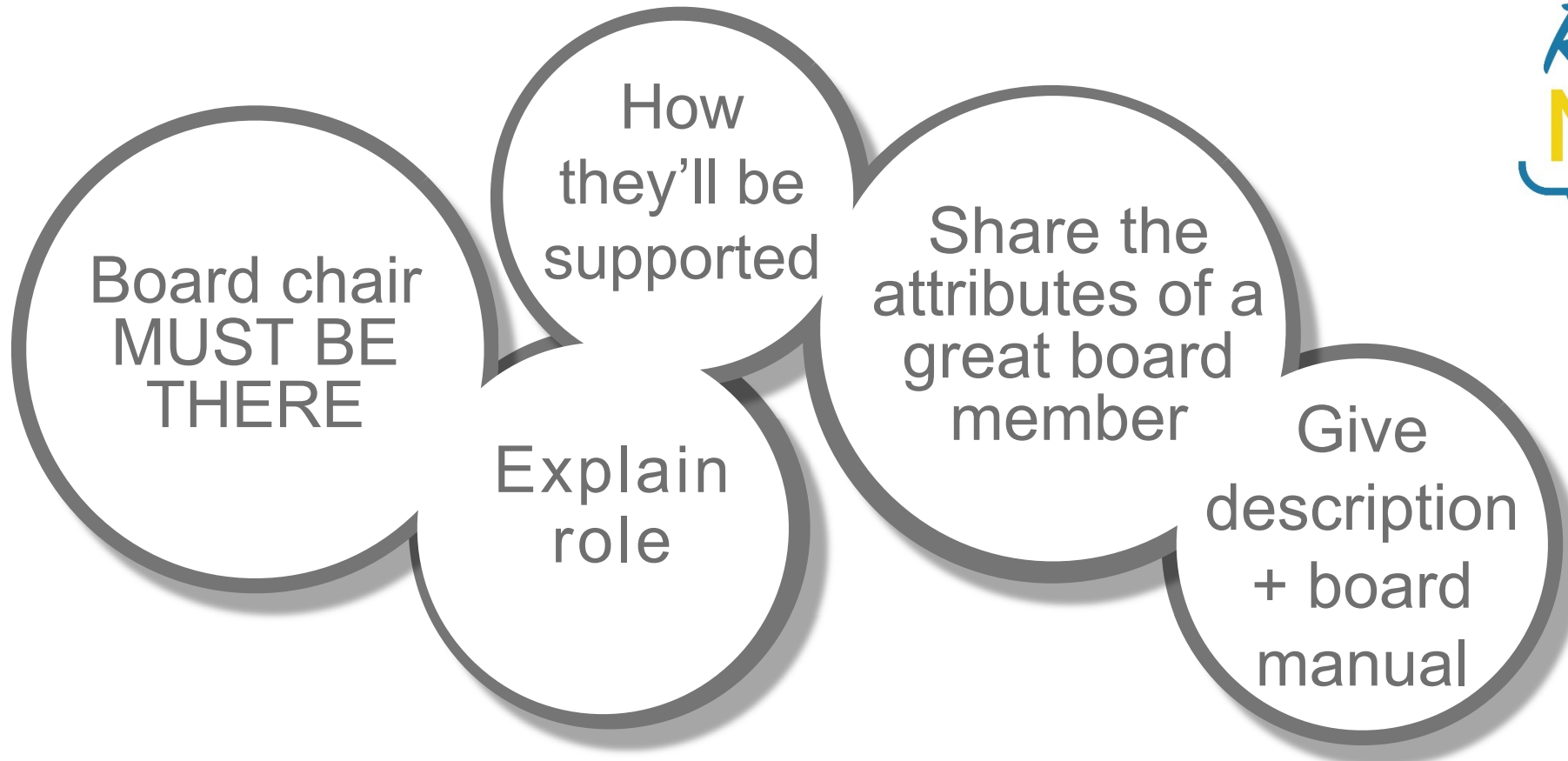
- Sharing an underused skill, talent or passion they have?
- Recognition at work?
- Networking time?
- New skills, knowledge or expertise?
- New circle of friends?



How to onboard new members

- Board orientation
- Board welcome
- Assign a board “buddy”
- 3, 6, 9 month check in
- Check in after 1st term to invite for 2nd or thank and release





Recipe for a board orientation



@rachelmuir



Facebook.com/RachelMuirFundraising



How do you make it fun?

Give a creative toy to celebrate great service like the Energizer Bunny

Create a “Member of the Moment” award for behind the scenes leaders

Give a funny award like a trophy to the board member who asks the best question

Fun ways to motivate board members

Celebrate big events in member’s personal, professional or volunteer lives.

After a long board meeting or retreat, hire a massage therapist to do chair massages

Include hobbies on your board roster. This gives members an opportunity to connect.

Make an “Above and Beyond The Call of Duty” award to give out anytime.

When it's Not Working – Graceful Exits



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**Who
initiates?**

Governance
committee

Board Chair

Graceful exits

Acknowledge failure to properly set expectations


Be sensitive to any health, personal or professional issues

“Are you temporarily a lot busier than usual? Do you have the time?”

Offer a leave of absence

Explore less time-consuming options i.e Ad hoc committee, consult, mentoring




A top-down view of a wooden desk. In the center is a spiral-bound notebook with a white cover and lined pages. A person's hands are visible; the left hand rests on the left side of the notebook, and the right hand holds a pen, poised to write. To the right of the notebook is a white cup of dark coffee on a matching saucer. The background is the natural wood grain of the desk.

How have we contributed
to your growth?

What would you like to
contribute if you served
another term?

How can we support your
development as a board
member?

A young man with dark, curly hair, wearing a blue button-down shirt, is shown in profile on the left. He has his hand near his chin in a thoughtful pose. On the right, a woman with long dark hair, wearing glasses and a white shirt, is looking towards him. Her hands are raised slightly with red-painted fingernails. The background is a blurred outdoor setting with a building.

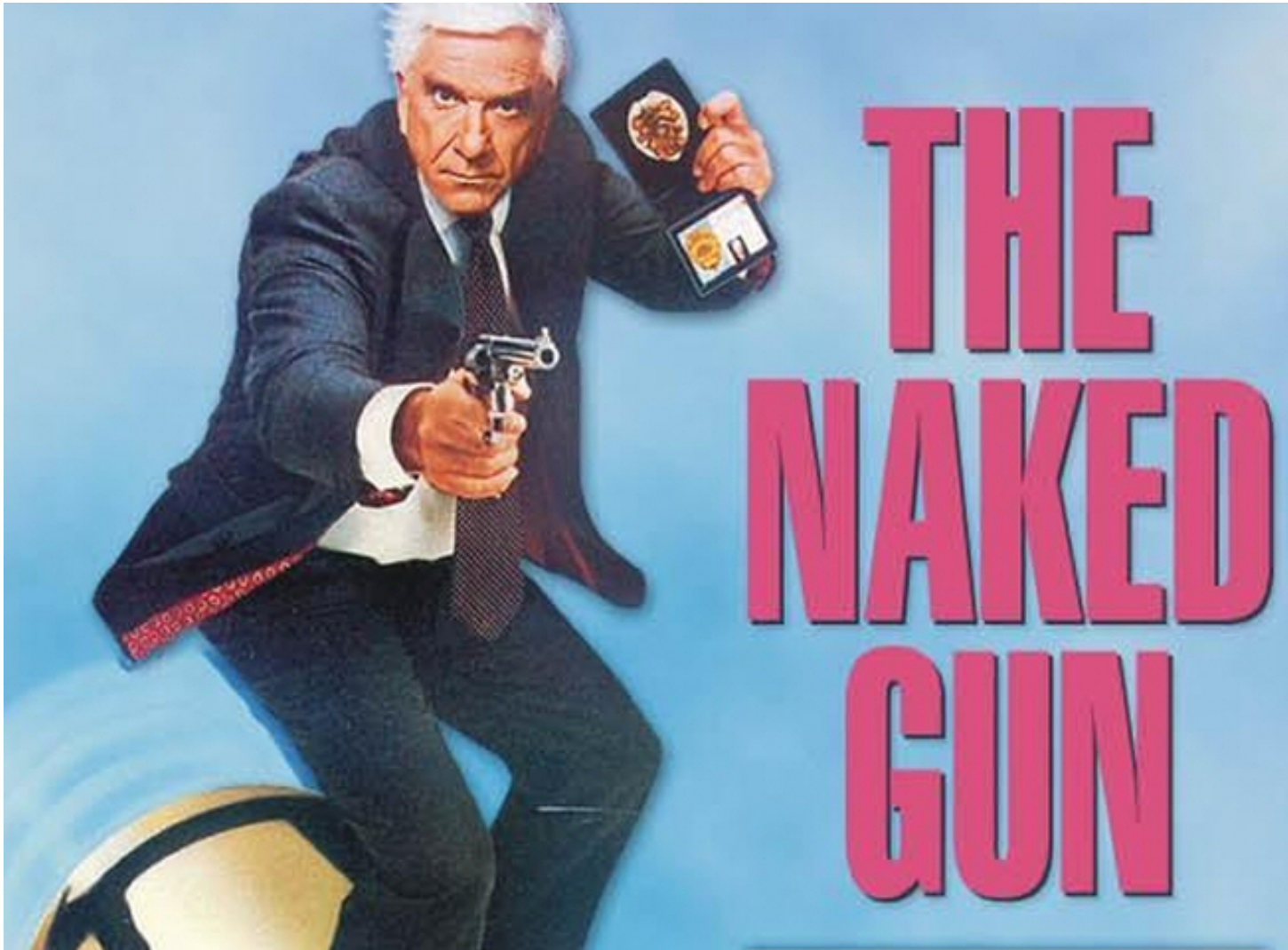
"I want to check in with you, because I'm getting the feeling that these meetings aren't working for you. It just seems like You don't really want to be here."

"I had been feeling so guilty about not being a good board member. Yes, definitely call me.!"

"I'm sorry, but that's true. I've got so much going on at work, I have too many meetings in my life, and I don't feel like I'm making a contribution here."

"Okay, as of now you're no longer a Board member. Relax and let it go. But we still want you to be part of our family. Would it be okay for us to call you with questions from time to time?"

Hired guns: Starting conversations you can't



Don't hire him!



The do's [and
don'ts] of
getting board
members to
fundraise



FUNDRAISING MISTAKES WITH **BOARD MEMBERS**



BEING ASKED TO SIGN THEIR NAMES ON YOUR
PROSPECT LIST

Fundraising is not a one size fits all opportunity

People are different!
Offer choices.





Menu of 2017 Fundraising Opportunities

Board Member: _____ Date: _____

Offer options.

This is an “all you can eat” menu!

We ask you to commit to as many items as you like – but at least one per category.

Appetizers

- ☐ Provide names of donor prospects
- ☐ Personalize letters to current and prospective donors
- ☐ Attend and mingle with donors at a House Party
- ☐ Introduce development staff to members of the business community

Entrees

- ☐ Host a House Party
- ☐ Arrange a site tour for some of your friends, conducted by the Executive Director
- ☐ Accompany the Executive Director or other staff on donor visits
- ☐ Organize a 2-hour volunteer party with friends or colleagues
- ☐ Recruit new board members with fundraising experience and connections
- ☐ Recruit Wintergreens or Farm Party sponsors
- ☐ Volunteer to help at Wintergreens or the Farm Party

Desserts

- ☐ Collect copies of other organizations’ solicitations and annual reports for GCH staff
- ☐ Make thank you calls to donors
- ☐ Promote and attend one of our annual events and mingle with donors

Source: Andy Robinson

Ways You May Help to Tell our Valencia Story and Expand our Mission:

- Schedule a campus tour.
- Invite a colleague to lunch at the college.
- Plan a storytelling event in your home or office.
- Include like-minded friends in Valencia events.
- Meet with Valencia students.
- Share Valencia facts and student successes on social media.
- Investigate internship opportunities at your firm.
- Start a scholarship in honor of a family member.
- Represent Valencia at community events.
- Invite students and staff to speak at your civic organization.
- Devote your birthday or anniversary to raising scholarship funds.
- Forward select info emails to friends, family and colleagues.
- Sponsor Valencia events, such as Taste for Learning.
- Attend Alumni Association events.
- Review the college and foundation websites.
- Invite arts aficionados to a campus performance or opening.
- Donate in-kind contributions to your favorite industry program.
- Understand the foundation's finances, budget and audit.
- Become involved in one of our board committees.

Ways You May Help to Tell our Valencia Story and Expand our Mission:

- Represent the board in the endowed chair review process.
- Share your local Valencia campus stories with neighbors.
- Hire Valencia graduates.
- Ask your firm to sponsor an event or adopt a student.
- Serve on a scholarship selection committee.
- Share our year-end invitation to invest with your network of influence.
- Ask professors to attend your community events.
- Offer to guest lecture in your field of expertise.
- Practice telling your Valencia story.
- Write donor thank you cards at board meetings.
- Call and thank donors in a mini thank-a-thon or if requested.
- Invite university/foundation staff as guest at a community/business event.
- Make a "personal treasure map" identifying 5-10 people to invite to campus tour, Valencia event or breakfast/lunch meeting with University President or Foundation Staff.
- Write personal notes to addressees on fundraising letters.
- Name Valencia in your will or estate.



Board Member Engagement Options

The Do's and Don'ts of Getting Boards to Fundraise

Why your board isn't fundraising and how to fix it

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GIRLS LEAD SAMPLE

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Did we leave anything out? If you've got ideas for other ways you want to engage tell us here!

Thank you for your service!

Signature: _____ Date: _____

Overcoming objections to fundraising



“I don’t want to ask my friends.”

Truth

- They likely share your values
- They want to help
- Our work as volunteers is a source of pride for them

Source: Andy Robinson,
What every board member needs to know, do and avoid



What kind of giving feels best?

“Donors feel happiest if they give to a charity via a friend, relative or social connection rather than an anonymous donation.”

Source: International Journal of Happiness and Development, 2013



“I don't know what to say to a donor”

- Give them 'goosebump' stories
- Have them call to thank donors
- Offer training
- Show them their impact
- Give them scripts
- Practice
- Make it fun



“Sally, I’m on the board of this terrific nonprofit, Boys & Girls Clubs of East Valley. One of my tasks is to raise money. I was hoping you could help with a donation of \$500.

If you have other priorities, I certainly respect that.

But I hope you can help.”



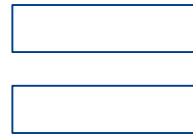
Board thank you call impact on gifts

**Thank you call
from board
member w/in 24
hours**



+39%

**14 months
later**



+42%

70% retention!

Give them a thank you script

Hi Carol,

I'm John Smith, a board member of Boys & Girls Clubs Metro Atlanta.

We're so thankful to receive such a generous first-time gift from you and happy to welcome you to our donor family.

Thanks to you, our club kids will be learning new computer languages after school! It's your kindness and compassion that's making this happen, Carol. I just wanted to say thanks to you personally.

We'll keep you updated on how your gift is making a difference in our monthly emails but please call us here at _____ if we can answer any questions or help you in any way.

Give them discovery questions

Do you have any feedback for us?

Is there any way we can make your experience more positive?

How can we get you more involved?

May I invite you to _____?



Make inviting their network easy



You're Invited!
Come Fly a Drone
@ Girlstart Summer Camp
Thursday, June 23, 2016
9:30am-10:45am
Girlstart STEM Center

RSVP Today

You're invited to a behind the scenes
Girlstart Summer Camp experience!
Come enjoy a light breakfast, network with other
friends of Girlstart, see summer camp in action,
and fly one of our awesome drones!

Flying Drones with Girlstart

by Douglas Ray | Jun 30, 2016 | Blog, SG Community | 0 comments



Have you ever flown a drone? I haven't. I've heard about them. I've seen them. But, I've never held the controls. So when Girlstart invited me out to check out what they've got planned for their next summer camp, I couldn't say no.

Girlstart is a nonprofit who was supported by Modernize at Startup Games: Austin 2016. They focus on encouraging girls in learning about and participating in STEM (Science, Technology, Engineering, and Math) areas. They have year-round education programs, including a series of summer camps that focus on various areas of study.

A small crowd gathered on a Thursday morning at Girlstart HQ (including a contingent from Modernize) where their team introduced us to their squadron of drones and plans for the camp. Their plan: teach the girls about manufacturing and aerospace engineering. How? Harry Potter. Or more accurately Hermione. She's solving the crisis Hogwarts just encountered with their owls all getting sick, and mail now needing new transportation.

The girls will learn about the drone's specs, design a carrier, and then guide the drone safely to its destination. In teams of four, they'll have to work together to save Hogwarts.

The group received an opportunity to test these Hogwarts-saving drones out. We learned to take off, fly, and most importantly land. I can now say that I've flown a drone. And, not to brag, but I'm pretty good. These drones work on a two joystick system that made my time spent playing video games totally validated.

Search

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Flying Drones with Girlstart
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Why We Play

Show them the IMPACT they can have



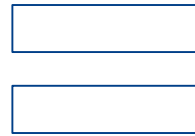
Impact of introductory tour on giving

**Average gift by
someone who
didn't take tour**



\$150

**Average
giving with
tour**



\$3,000

1900% increase!



Chat in:
What's the number one
thing board members
need to know about
fundraising?

The Joy of Giving





Tips to make board members fundraising
superheroes

Share why they
give

Invite 10 guests for
tour of org

Get assigned to
cultivate 2-3 donors

Fundraising Ideas for Board Members

Host cultivation
event in their
home

Share client
stories or
testimonials



Give
personally.

Call
donors
to thank.

Put
org in their
estate plan.



UNSURE IF MEMBERS HAVE NAMED YOU IN THEIR WILL?

Ask your board at next board meeting

Do you have an estate plan? _____ Yes _____ No

Have you named a charity(ies) in it? _____ Yes _____ No

Do you have our org in your will? _____ Yes _____ No

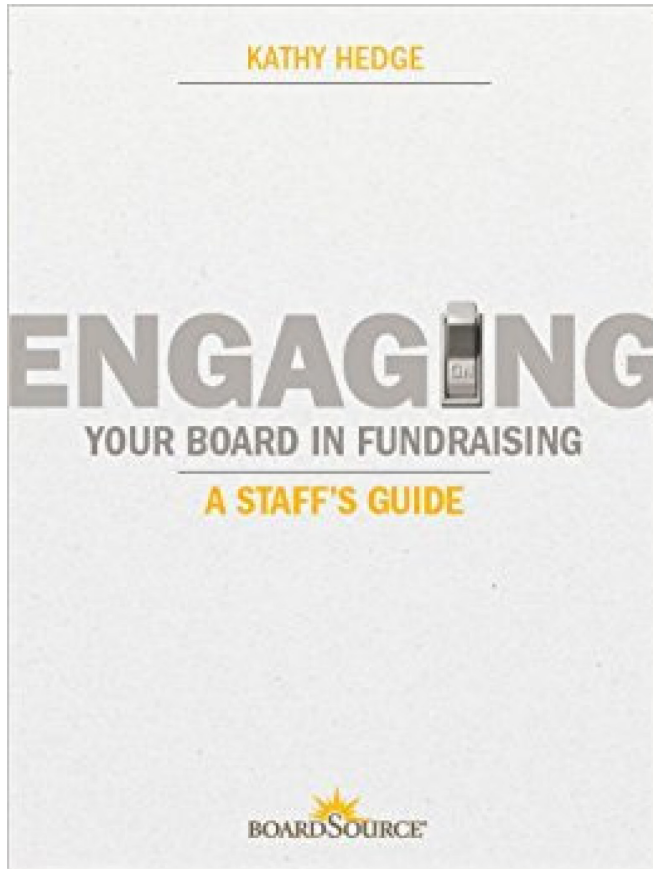
If no, would you consider it? _____ Yes _____ No

Name (optional) _____

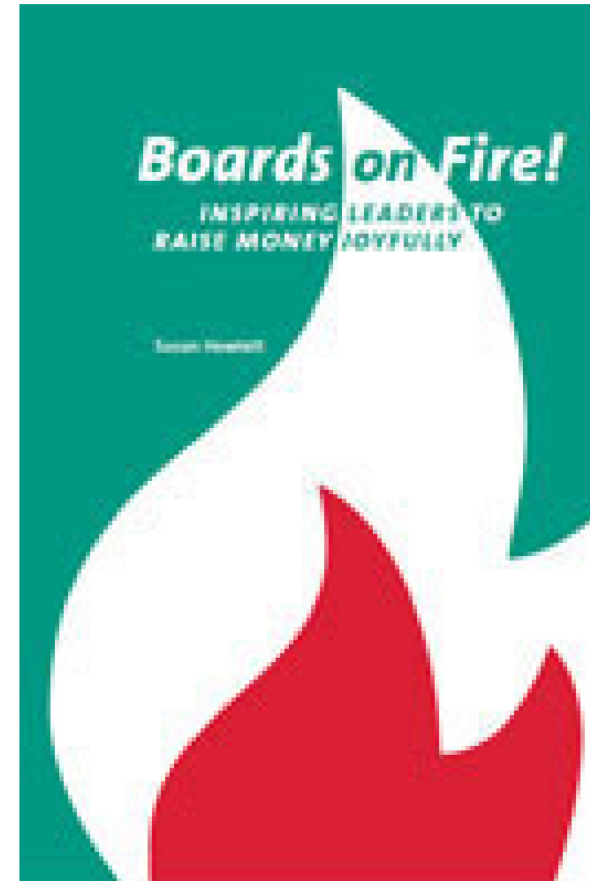


Questions?

Recommended Reading



By Kathy Hedge



Susan Howlett's Boards on Fire



THANK YOU!

Rachel@rachelmuir.com Slides-> www.rachelmuir.com/handouts

Monthly training with Rachel (only \$49)



Learn more at: www.leagueofextraordinaryfundraisers.com

Thank you!



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