



How to Get Participation – Not Just Ideas from Your Board

Presented By: Mary Sumners, Kennari Consulting

Thursday, September 9, 2021 | 11:00 a.m. – 12:00 p.m. EDT



A little housekeeping...



We're recording this webinar!

All registrants will receive an email containing a link to the recorded webinar AND a ton of other resources!



Feel free to ask questions!

Use the Questions chat box to ask your questions. We will have a Q&A session at the end of the presentation.



We will be live-tweeting!

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**Smart and Strategic
Approaches to Philanthropy**

Today's Speaker



Mary Sumners | Vice President, Kennari Consulting

Mary's areas of expertise include annual giving strategies, capital campaign management, and board and volunteer committee support. Mary has tremendous knowledge on managing the day-to-day challenges of fundraising and enjoys facilitating the decision-making process with clients. She is especially passionate about helping boards become more inclusive and intentional in representing the communities they serve. She is also BoardSource certified, which has given her greater insight into how nonprofit boards can best support their organizations.

Overview

- + Fundraising engagement starts with **overall board engagement**
- + A **board expectation policy** provides a clear description of needs and roles
- + There are **four roles** that all volunteers, including board members can play in fundraising
- + Board members need **support from staff** to be successful in fundraising



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Keys to Good Board Engagement



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Keys to Good Board Engagement

- Agendas that include meaningful discussion opportunities that help them meet their board responsibilities(©BoardSource):
 - Establishing Identity and Strategic Direction
 - Ensuring Resources
 - Providing Oversight
- Effective Committee Structure Including:
 - Limited Executive Committee Role
 - Outcomes-based Fundraising Committees



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Board Expectation Policy

- + Crafted and approved by the Board
- + Used in the recruitment process
- + Revisited/revised every two or three years
- + Referred to as part of the term renewal or annual review process



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Sample Board Expectation Policy

1. Board members will not receive compensation for their service on the Board.
2. Each board member shall become familiar with the agency's Bylaws and Policies.
3. Board members are asked to monitor (not manage) the activities of the agency including program outcomes, financial performance and human resources.
4. Board members should serve on at least one committee and serve on work groups as assigned by the Board Chair.
5. Board members may not use or distribute confidential agency lists or information for their private purposes.
6. Board members will make an annual contribution commensurate with their ability to give.
7. Board members will participate in annual fundraising activities including attending special events and assisting in the identification, evaluation and solicitation of donor prospects.
8. Board members will participate in the recruitment of new board members.
9. Members shall attend regular Board meetings and those called by the Chair.



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Four Roles of Fundraising

- Providing Intel
- Inviting Prospects to Participate
- Asking for the Gift
- Thanking Donors



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Providing Intel

- Information helps staff determine the right cultivation pathway for each donor prospect
- Volunteers and Board Members often have more information than we can glean from wealth data or what donors tell us
- Information can range from understanding what part of your mission they might like most, to engagement with other nonprofits, to a potential ask range
- Specific information about why they might be compelled to your organization is particularly helpful



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Inviting

- Board members can invite others to events, tours, open houses, or simply to like your social media or visit your website
- A personal invitation from someone they know can compel a prospective donor to attend when they might not otherwise
- In addition to events, board members can invite donor prospects to serve on committees or join the board

Asking

- Sometimes donors would prefer to be asked by their peer or friend, whether that person is present in the meeting, or they are asking directly.
- A personalized note on a direct mail piece greatly increases the likelihood that a gift will be made.
- Board members who are comfortable asking can be utilized in many ways, including following up on sponsorship requests and making connections with major donors.



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Thanking

- A thank you from a board member should always be in addition to formal recognition by the organization.
- Thank you calls and “thank-a-thons” are great ways for board members to learn more about your donors.
- Those that were asked by a board member should be thanked by that same board member.

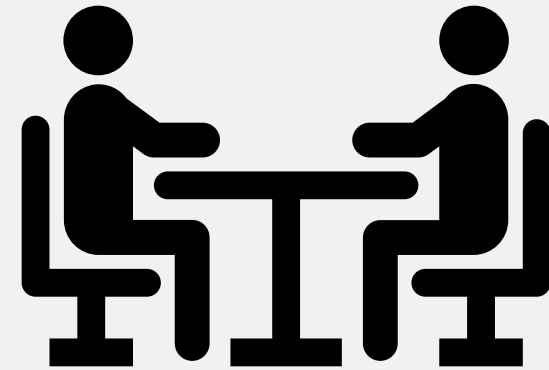


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Time to Implement!

- Set a regular annual time to sit down with each board member.
- Be prepared with some ideas to get the conversation going.
- Use a planning tool or other type of documentation to be sure you can help them set and meet their goals.
- Touch base often.
- Share positive examples at board meetings or in other board communication.





Learn More Board Engagement Strategies!

To schedule a free 30-minute consultation with Kennari Consulting contact:

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www.kennariconsulting.com

More Resources Available!

Use coupon code "Qgivboard" for a free series at getfundkit.com



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Questions?



This webinar program qualifies for 1 point of continuing education toward maintaining the Certified Fundraising Executive Management (CFRE) credential.



Thank you for joining!

For more information on Qgiv's fundraising platform, contact:

contactus@qgiv.com | 888-855-9595

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