



**MAIN STREET  
AMERICA™**

*Coordinating Program*

**WYOMING MAIN STREET**

# SECRETS TO SUCCESSFUL BOARD ENGAGEMENT

March 25, 2021

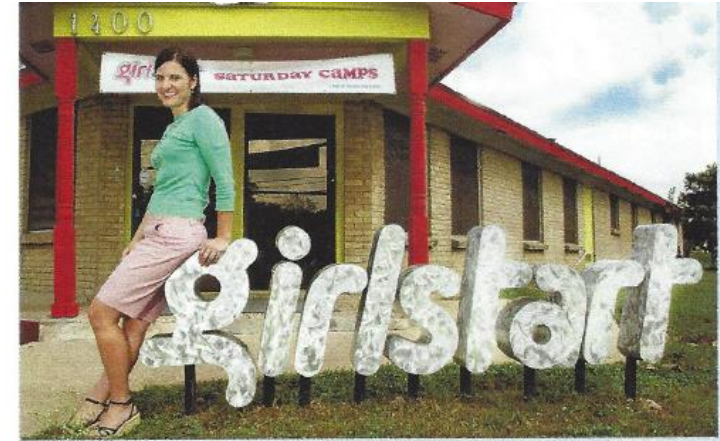


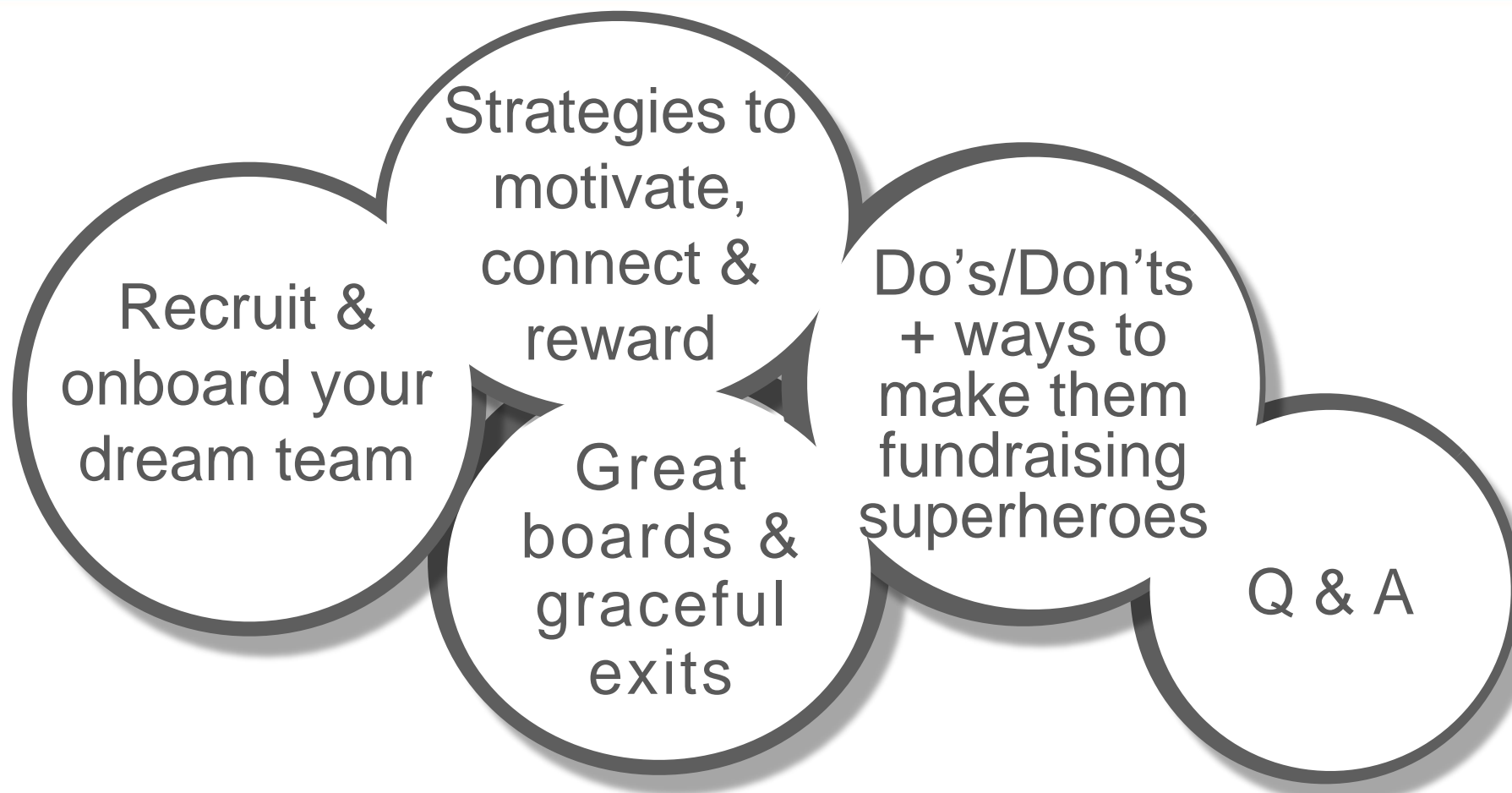
# Rachel Muir, CFRE

- 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](http://www.rachelmuir.com)





# Secrets to Successful Board Engagement

I brought party favors!



Download at [www.rachelmuir.com/board](http://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](http://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.
- Organize a group of friends and/or colleagues for a girl event, or volunteer workday
- Introduce my company's leadership to the Executive Director or Development Director.
- Join staff on a discovery visit to get to know prospective donors and their interests.
- 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.
- Recruit committee members for Inspire a Girl.
- Bring interested friends and acquaintances for a tour of our facility.
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- Write (or record) my own personal story about why I serve and give to Girls Lead.

### ASKER

- 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!

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Thank you for your service!

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

# 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](http://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.



# How often do you offer board training?

1. Yes! At least once a year.
2. Every other year.
3. Once every few years.
4. Aack! We know we should...



"Staff raises money. We suggest who to ask."

"I wasn't told I'd have to fundraise!"

"I'm allergic to fundraising."

"We do all the work and the board just approves it. They feel irrelevant."



"I'm giving you my time. That's worth a lot of money!"

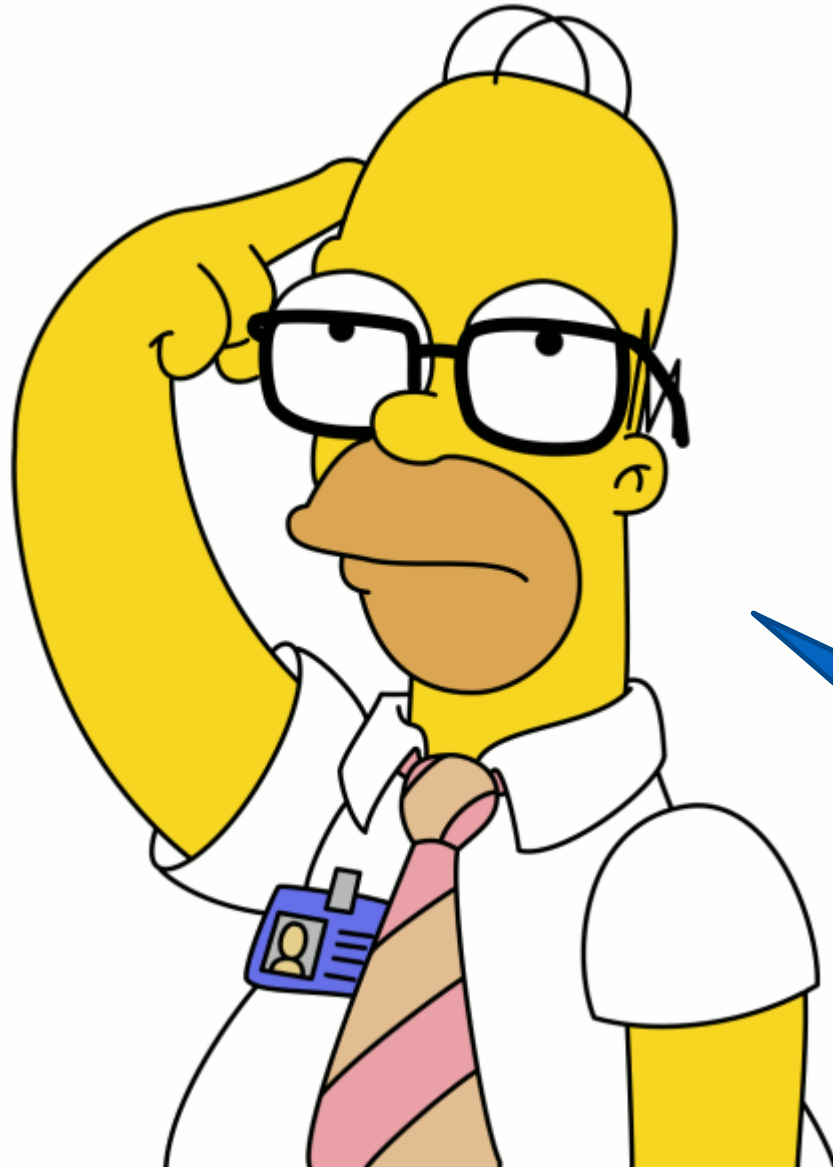
"This board demands too much time and too many resources!"



Who you thought you were getting



# Who you got



Where'd it all go wrong?





Unclear expectations are a path  
**to failure**



“

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



@rachelmuir



Facebook.com/RachelMuirFundraising

# Three 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







WHY RECRUITMENT, ONBOARDING & CULTIVATION

IS TOP PRIORITY





# 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?







**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)



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...

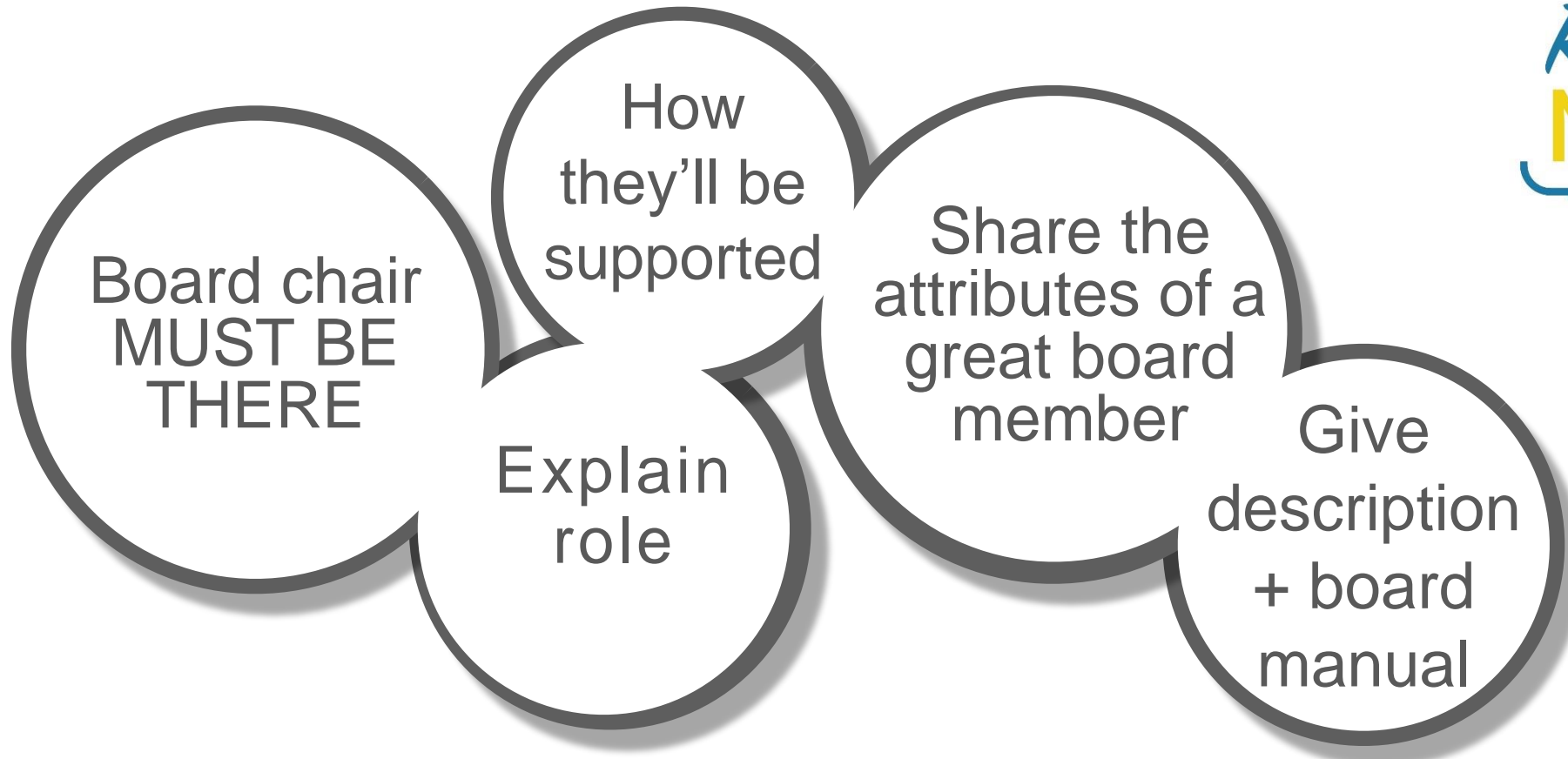
- Sharing an underused skill, talent or passion they have?
- Recognition at work?
- Networking time?
- New skills, knowledge or expertise?
- New circle of friends?



# How to onboard new members

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





## Recipe for a board orientation



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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

# Strategies to connect & motivate boards

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

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 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 young woman with long dark hair, wearing glasses and a white shirt, is looking towards him. Her hands are raised in front of her, palms facing each other, as if she is explaining something or gesturing during a conversation. 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?"





Split into small groups to brainstorm/present

Have client, staff or board give story or testimonial

Start with fun ice breaker or thank-a-thon

Summarize key points in advance

Serve food have guest speakers

Tips for better board meetings from great boards



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





# Board Member Giving Plan

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Thank you for your dedication to LOHF and our mission to improve children's behavioral health and to strengthen the capacity of healthcare professionals in Lancaster County!

This year, we are asking each Director to **Give, Get, and Engage!** You have the unique opportunity to make a profound impact on the success of LOHF. Directors who embrace and actively participate in our fundraising efforts by making gifts and help to secure donations from others, set the fundraising pace for the organization.

Your active participation makes us much more likely to succeed in the long run. Please complete this form, which will serve as your 2017 giving plan, by confirming your personal gift and selecting the donor development and organizational support activities to which you will commit during the year.

## Give! Board Support

I pledge to give an amount this year that is personally significant to me.

- ☐ I am committed to making LOHF one of my top three charities and will make a gift of: \$ \_\_\_\_\_
- ☐ My company/organization will match this amount for 2017 \$ \_\_\_\_\_

### Gift Options

- ☐ Full donation is being made at this time.
- ☐ I pledge to make my full donation by June 30, 2017.
- ☐ I pledge to make my donation(s) through the United Way of Lancaster County's campaign.
- ☐ I pledge to make an additional donation during the annual ExtraOrdinary Give in November.
- ☐ I pledge to make my donation by December 31, 2017, knowing that I may choose to support specific fundraising events during the year.

### Payment Method

- ☐ Check payable to LOHF
- ☐ I will/have set up a regular monthly donation to LOHF with my bank in the amount of \$ \_\_\_\_\_ /month.
- ☐ Credit Card ☐ VISA ☐ MasterCard ☐ Am Express ☐ Discover
- Number: \_\_\_\_\_ Expiration Date: \_\_\_\_\_ SCC Code: \_\_\_\_\_
- Please charge the credit card above per my payment schedule: \_\_\_\_\_
- ☐ Gift of Appreciated Securities. Please contact me.

### Donor Recognition

- ☐ Please recognize this gift as from: \_\_\_\_\_
- ☐ Please recognize this gift as anonymous.

### Planned Giving

- ☐ I have made the arrangements for a Planned Gift to LOHF.
- ☐ I'm interested in talking about a Planned Gift to LOHF.

## Get! Donor Appreciation

I will support LOHF using my network of connections:

- ☐ Join our Executive Director on a donor visit to solicit a major gift.
- ☐ Assist in cultivation and/or solicitation of major gift prospects.
- ☐ Contact 10 past donors in order to reconnect them to LOHF.
- ☐ Make thank you calls to donors as requested by staff during special events, campaigns, or major gift donations. (This activity involves calling donors just to say "thanks". You will be given information and assistance to make these calls.)
- ☐ Write notes to major donors on event invitations, annual solicitation letters, etc.
- ☐ Bring someone in my network for a tour of LOHF & meeting with our Executive Director.
- ☐ Connect the Executive Director with my company/organization for the purpose of contributing through a tax credit program/grant.
- ☐ Host a Network Night or an organizational awareness event in my home, or hold another function to benefit LOHF and build awareness. (By hosting a house party, you underwrite the cost of food and drink, and open your home to friends, family, business contacts or LOHF-provided prospects.) Months which are best for me: \_\_\_\_\_.

## Engage! My Commitment

To further support of LOHF, I will:

- ☐ Devote time to serving on and attending meetings for at least one standing committee.
- ☐ Attend LOHF program events as a participant and/or volunteer (Nurse Scholarship Reception, Continuing Medical Education lecture series, Grants Info Session, Community Listening Meetings).
- ☐ Take the Executive Director to a community event as my guest.
- ☐ Attend the Holiday Party in December.

# 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

Your handouts

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

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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





“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.”



# 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

### Recent Posts

Flying Drones with Girlstart  
A New Champion in the 2nd  
Annual Startup Games: Level  
Up  
Startup Games: Level Up 2016  
Fierce Competition at Startup  
Games: Austin 2016  
Startup Games 2016

### Archives


June 2016  
April 2016  
March 2016  
January 2016  
November 2015  
October 2015  
August 2015  
July 2015  
June 2015  
May 2015  
April 2015  
March 2015  
January 2015  
December 2014  
November 2014

### Categories

Blog  
SG Community  
Why We Play



# Show them the IMPACT they can have

A photograph of three people in an office environment. On the left, a woman with long dark hair is smiling. In the center, a man with a beard and mustache is looking towards the right. On the right, a woman with glasses and a black turtleneck is pointing her right index finger towards the right. They appear to be engaged in a discussion or presentation.

Board members are asked to invite prospects for an introductory tour. When thanking them, staff show the average gift by a person who took the tour is \$3,000 (compared to a person who hasn't taken which is \$150).



“

How can we set up the conditions in which board members will motivate themselves?

Kathy Hedge,  
Engaging Your Board in Fundraising



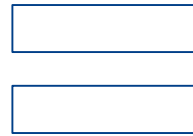
# Impact of introductory tour on giving

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



**\$150**

**Average  
giving with  
tour**



**\$3,000**

**1900% increase!**

# 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

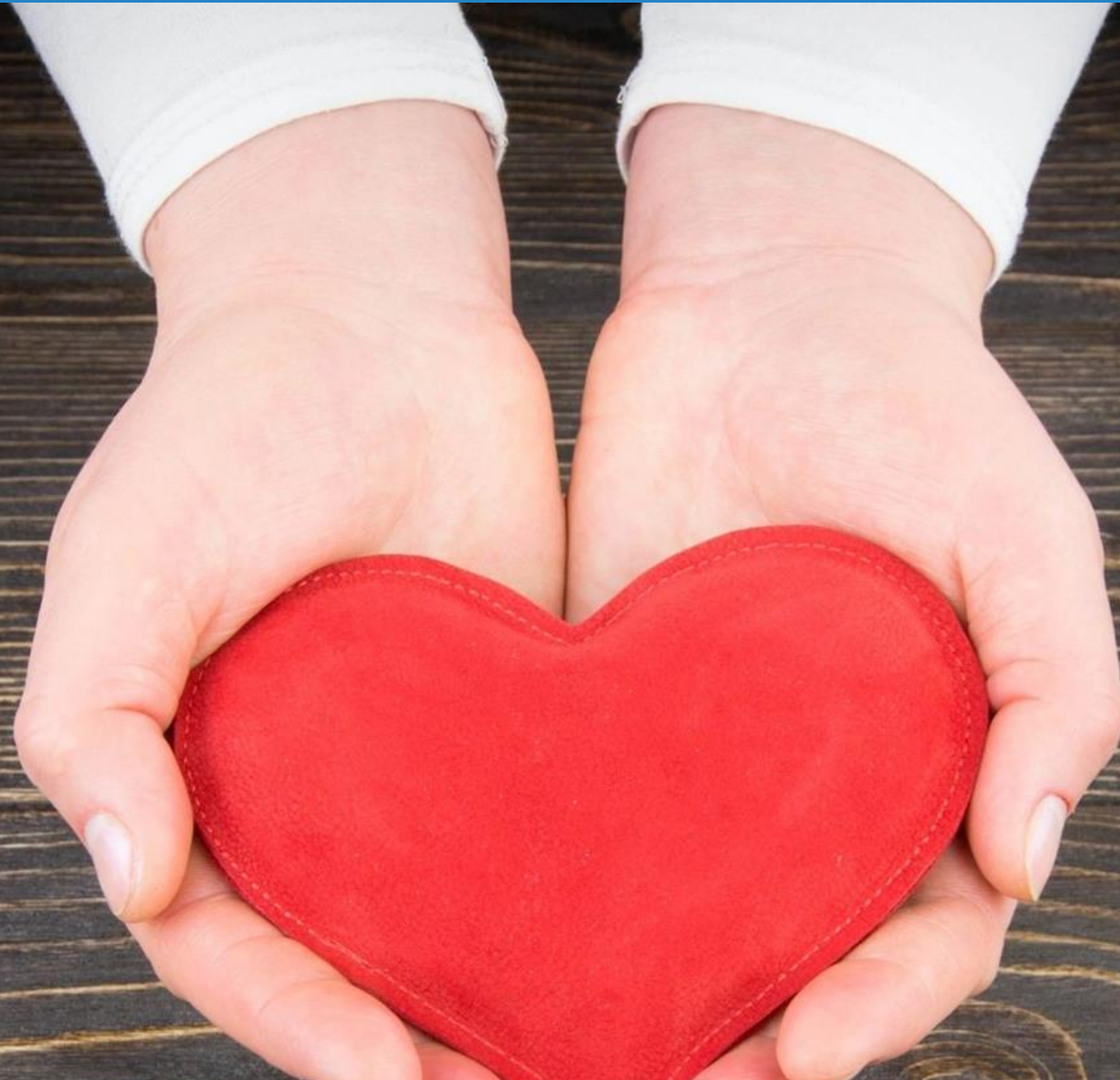




What's the number one thing board members need to know about fundraising?



# The Joy of Giving







Focus on the rewards of how

**GOOD GIVING FEELS**



That warm and  
glowing feeling  
that comes over  
you when  
you give to a  
cause you love.





How proud you are  
of your friends who  
work so hard for  
the causes they  
love...





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 club stories  
or testimonials



Give  
personally.

Call  
donors  
to thank.

Put  
org in their  
estate plan.



“You haven’t made  
your own gift but  
you’re asking  
me to give?”





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

# Got board questions?

Join me tomorrow

Friday March 26 11 am MT

Board therapy Q&A

[bit.ly/WyomingMainStreet](https://bit.ly/WyomingMainStreet)







THANK YOU!

GOOD  
VIBES

Rachel@rachelmuir.com Slides-> [www.rachelmuir.com/handouts](http://www.rachelmuir.com/handouts)