



# **Philanthropic Leadership: Engaging Board Members & Volunteers in Fundraising**

Presented By: Elizabeth Abel, Vice President, CCS Fundraising

December 11, 2019



# Our Discussion

- I. Welcome & Opening Remarks

---

- II. Key Trends in Philanthropy

---

- III. Nonprofit Board Roles & Composition

---

- IV. Engaging Board Members & Volunteer Leaders in Fundraising

---

- V. Q&A

---

# Our Goals

**1.**

Understand what makes an effective Board member and volunteer leader

**2.**

Develop strategies to engage, empower, and deploy Board members and volunteer leaders in fundraising activity

**3.**

Discuss effective tools to support your fundraising ambassadors

# Welcome & Opening Remarks

# About CCS

Since 1947, CCS has empowered the world's greatest organizations to solve the most pressing social problems



**OUR  
PEOPLE**

**400+**

expert staff across 12 offices and 3 countries



**OUR  
CLIENTS**

**40%**

of America's Top 100 performing charities

**85%**

repeat and referred business



**OUR  
WORK**

**250+**

campaigns managed every year

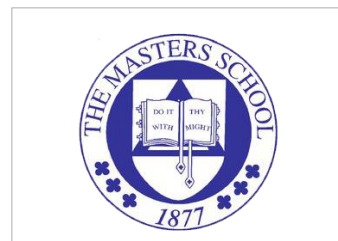
**200+**

Planning Studies and Assessments conducted

**\$11B**

in campaign goals under management

# A Selection of CCS Clients



# Key Trends in Philanthropy



In 2018, Americans Gave

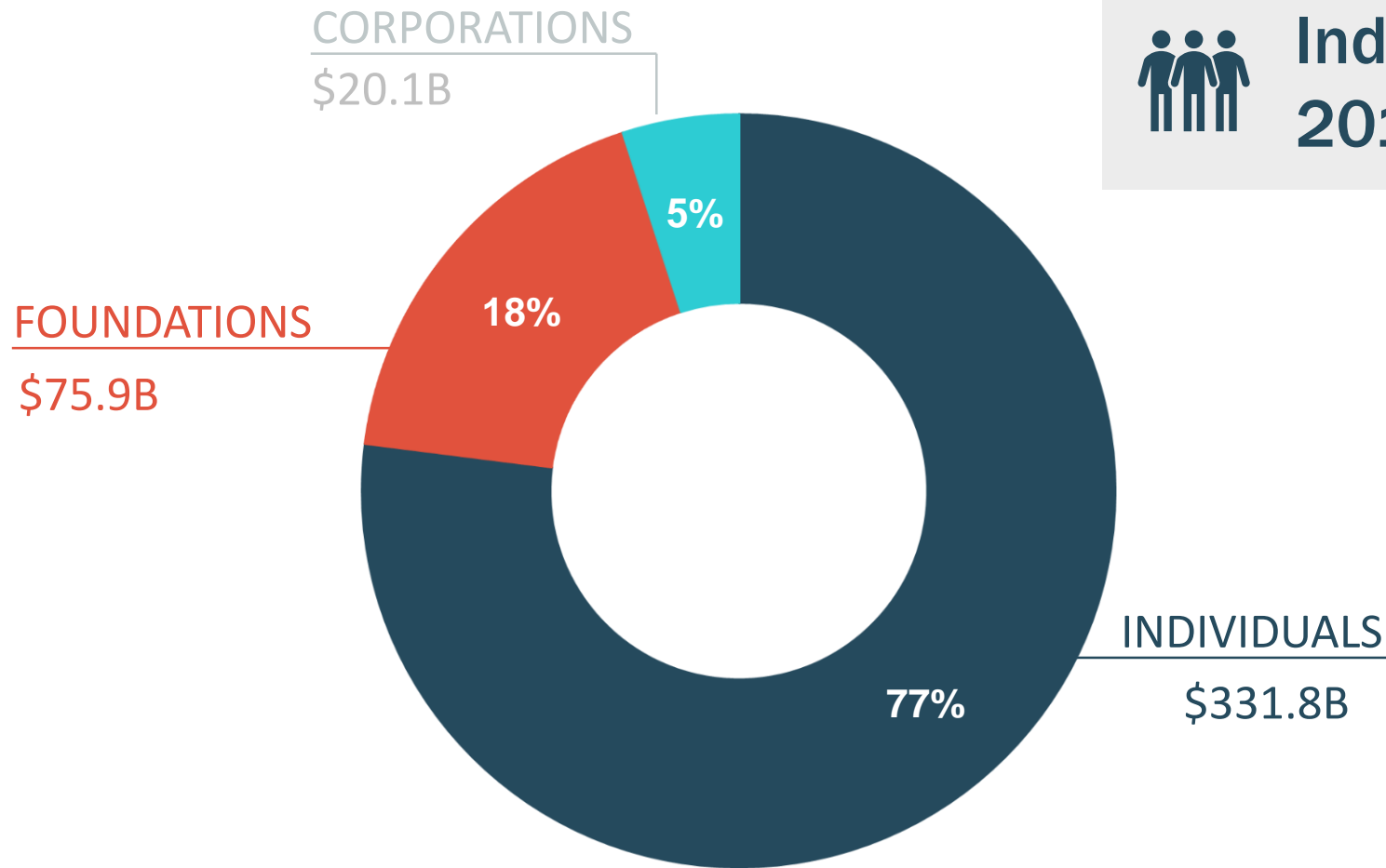
**\$427.71 BILLION**



# Individuals Continue to Make a Difference



**Individuals gave \$331.8B in 2018, or 77% of total giving**



## Americans are Generous

56%

of Americans give  
to charitable  
organizations

\$2,514

average amount  
given annually

83%

plan to give as  
much / more this  
upcoming year

## Strong Culture of Volunteering

30%

of Americans  
volunteered

80%

of volunteers also  
donated

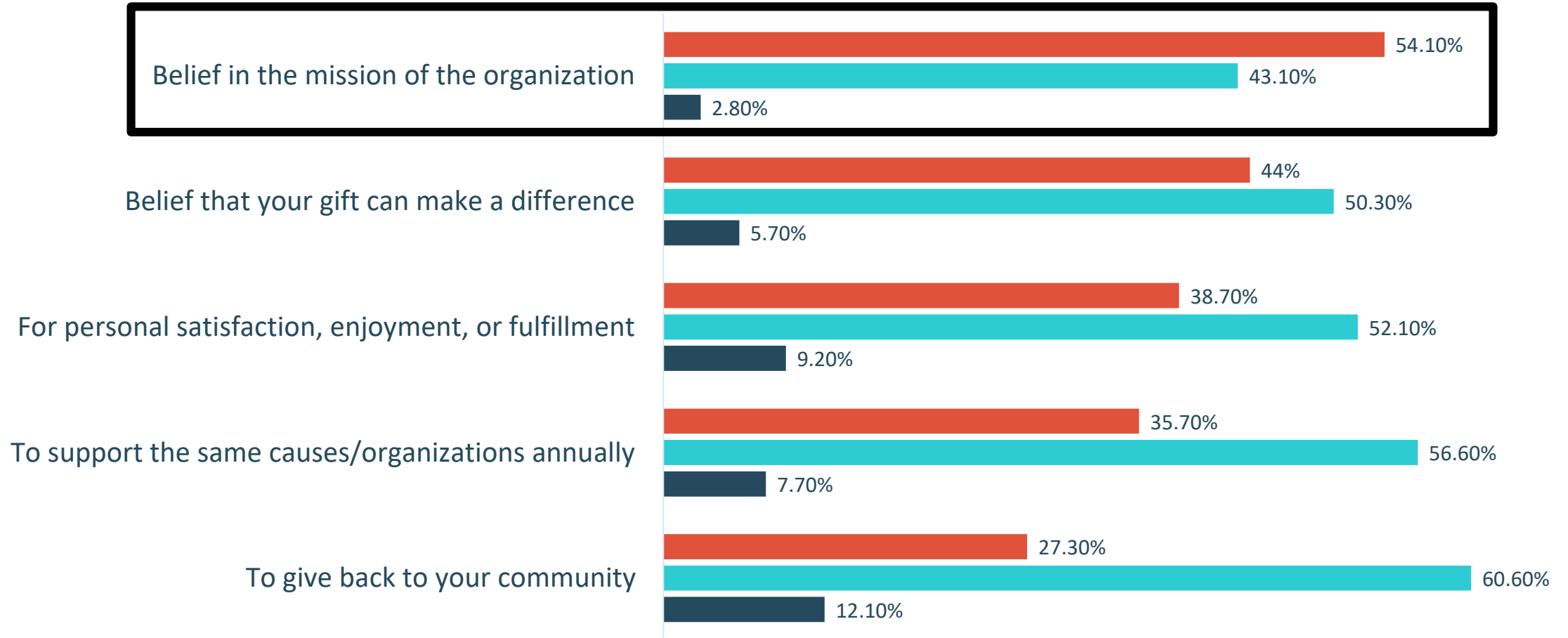
50%

of volunteers  
donated *more*  
after volunteering

# Donor Motivations

## MISSION MATTERS MOST

Always Sometimes Never



Source: The 2016 U.S. Trust Study of High Net Worth Philanthropy *Bank Of America* 2016



People  
give to  
**PEOPLE**

# Nonprofit Board Roles & Composition

# Role of a Nonprofit Board

## STRATEGY

To give the organization direction and establish its vision, mission, and values

## OVERSIGHT

To provide oversight, especially in financial matters, to ensure accountability

## PARTICIPATION

To ensure the organization has the resources it needs to do its work

# Setting Fundraising Expectations

When fundraising expectations are clearly articulated during Board recruitment:

**52%** of CEOs report their boards are actively engaged in the organization's **fundraising efforts.**

When fundraising expectations are not clearly articulated during Board recruitment:

**Only 12%** of CEOs report their boards are actively engaged in the organization's **fundraising efforts.**

Source: BoardSource; "Leading with Intent, 2017 National Index of Nonprofit Board Practices

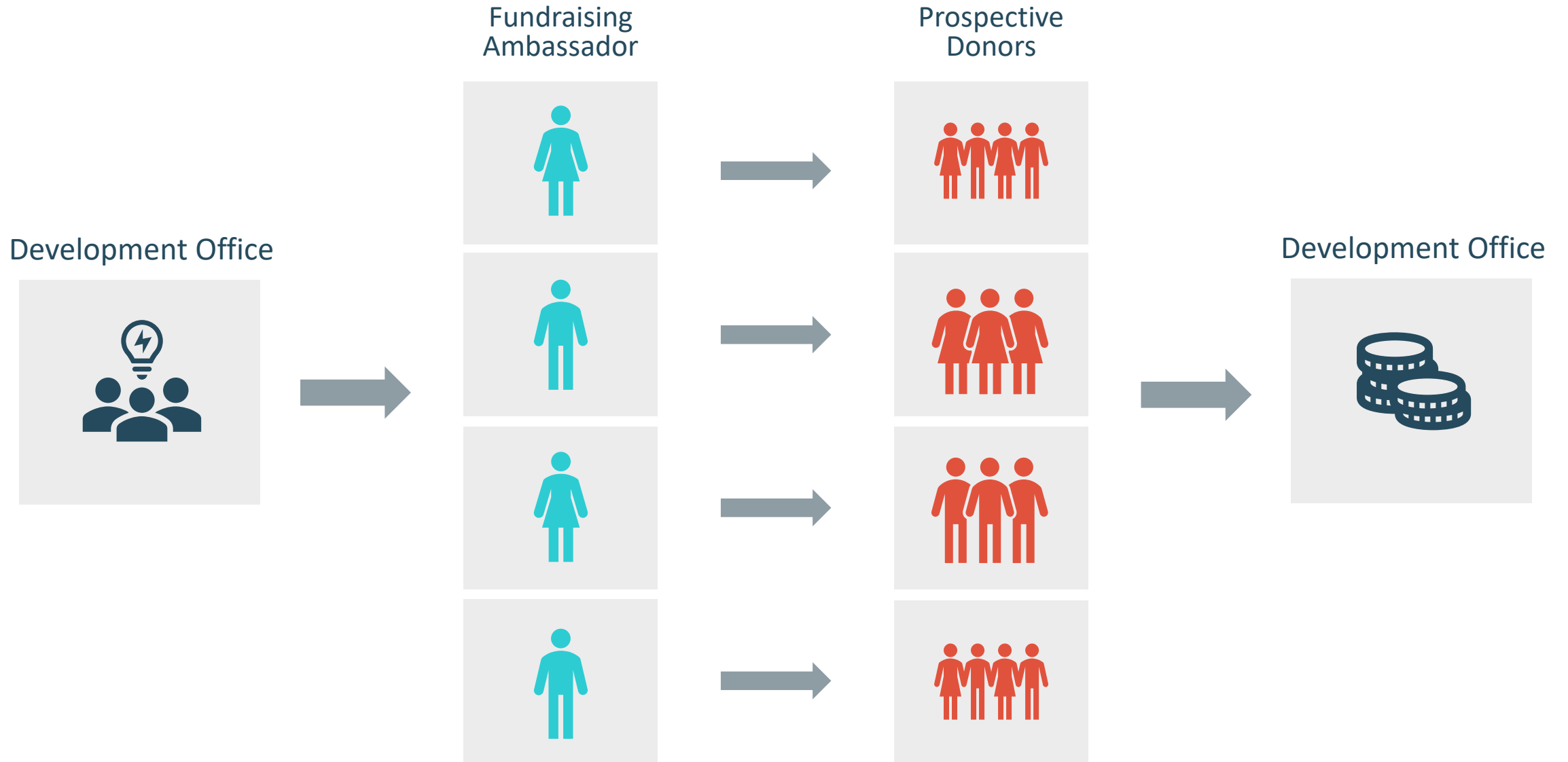


# What Donors Want to Know About Your Board

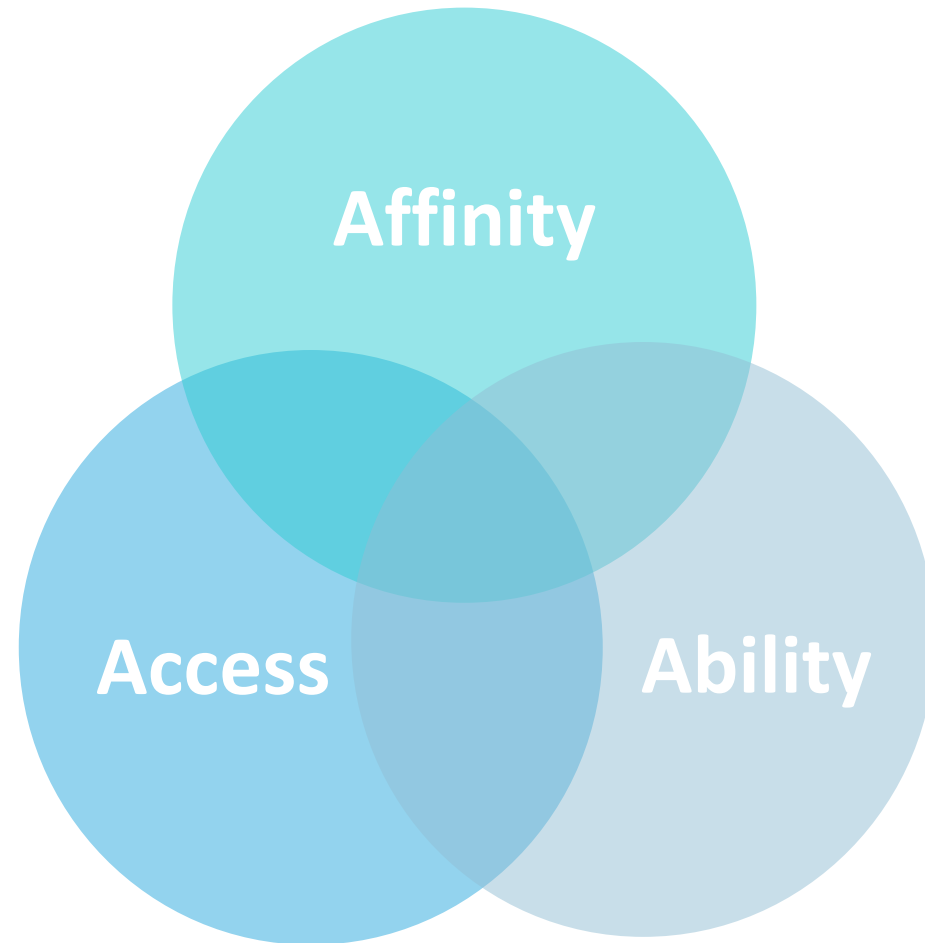
1. Support mission
2. Personal involvement
3. Diversity and inclusiveness
4. Financial support at 100% participation
5. Solid partnership between Board and administration

# Engaging Board Members & Volunteer Leaders in Fundraising

# Multipliers

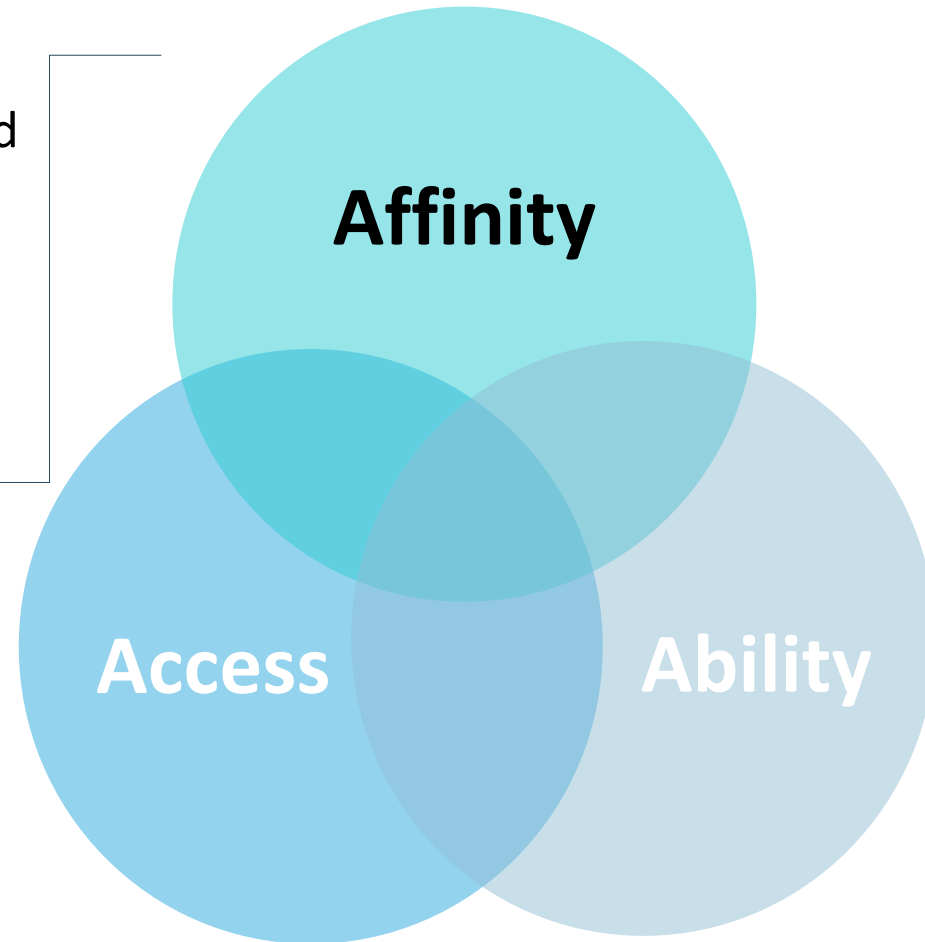


# Identifying Prospective Fundraising Ambassadors

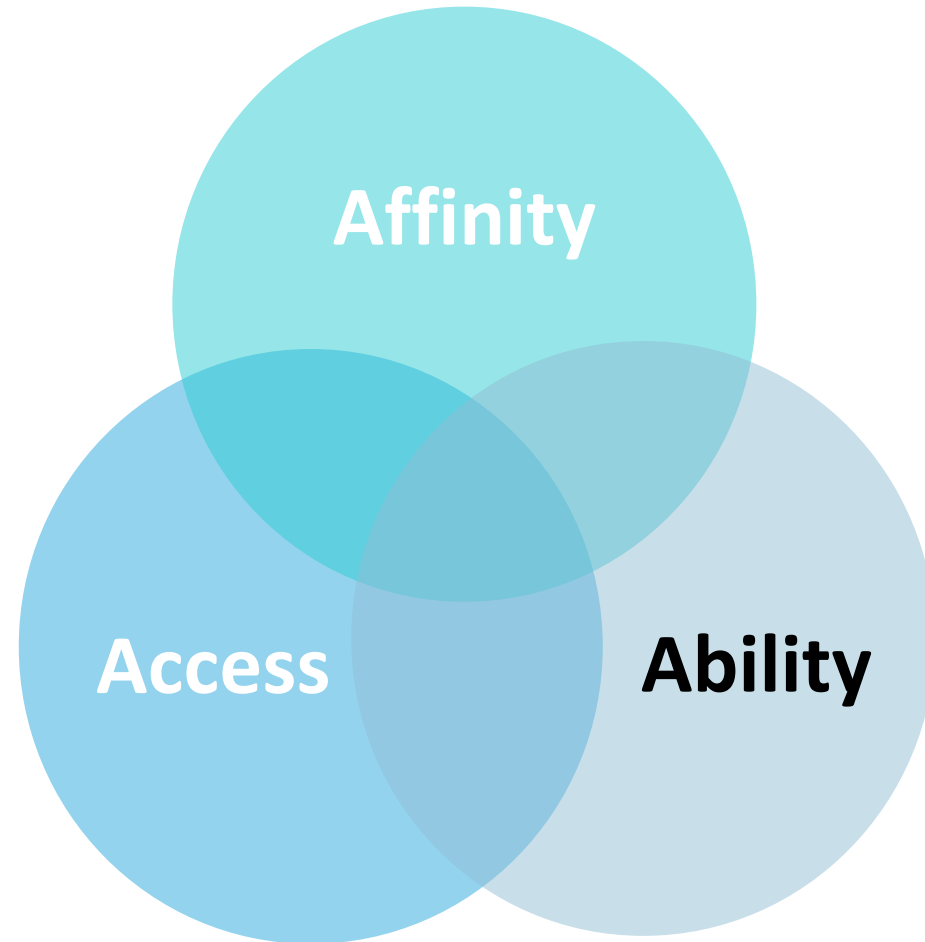


# Identifying Prospective Fundraising Ambassadors

- Is the ambassador aligned with the mission of your organization?
- Is your organization a top philanthropic priority?

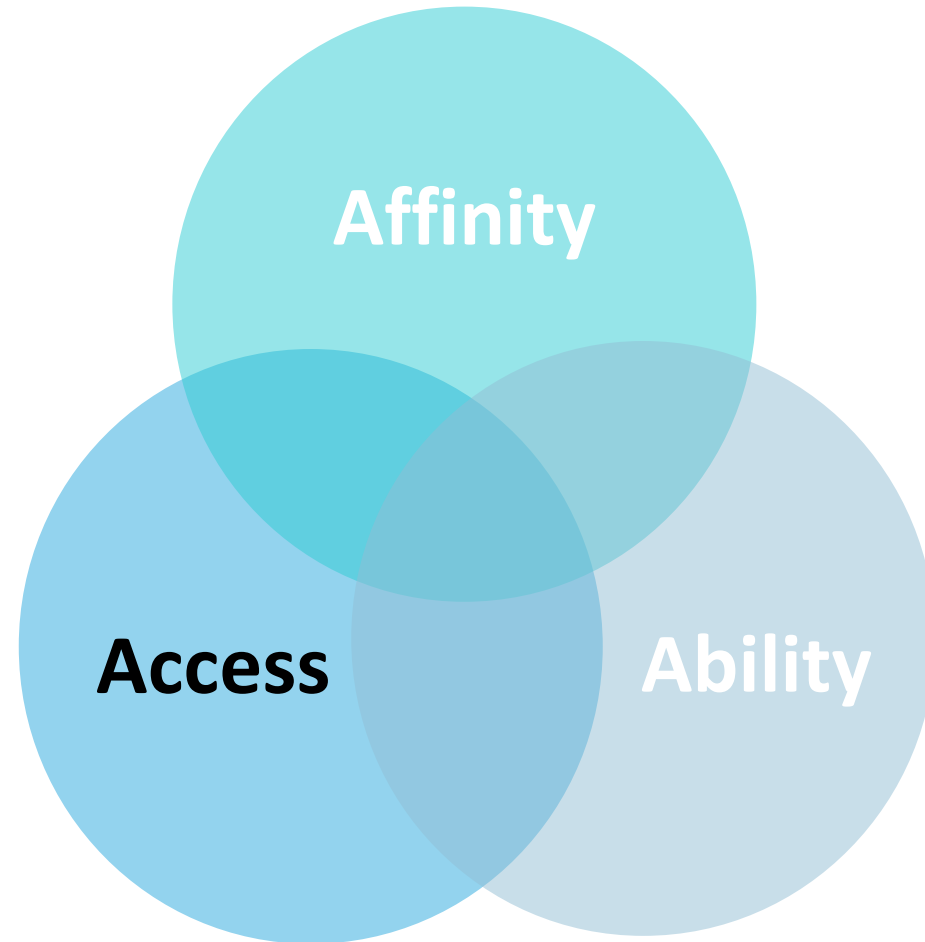


# Identifying Prospective Fundraising Ambassadors



- Does the ambassador have the financial ability to make a meaningful investment in your organization?
- Has he/she served in a leadership role or demonstrated leadership level giving before?

# Identifying Prospective Fundraising Ambassadors



- Does the ambassador have a strong network or relationships with prospective supporters?

# What Makes an Excellent Fundraising Ambassador?



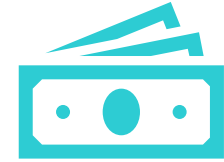
Passionate about  
the mission



Respected  
community leader



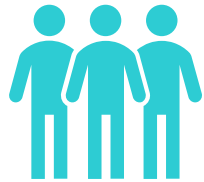
Access to potential  
support



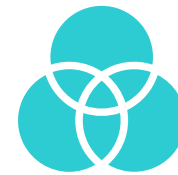
Personally  
philanthropic



Time to commit



Willing to make  
introductions



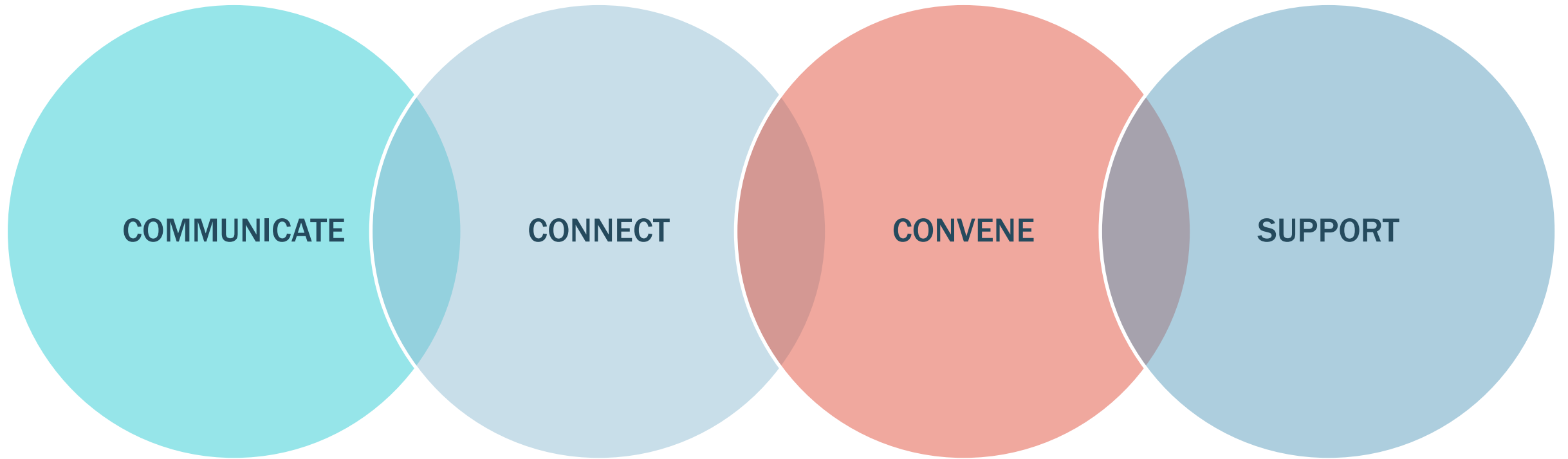
Represent a key  
constituency



Inspiring personal  
story



# Opportunities to Engage with Fundraising





# COMMUNICATE

- Generate enthusiasm and momentum around the **case for support** – *talk about the organization*
- Speak on behalf of the organization – formally, at events, and informally, with friends
- Share **personal story**; share why they give
- Allow use of name associated with your organization



# CONNECT

- Identify and qualify prospective donors; assist in identifying donors' interests (**“prospecting sessions”**)
- Facilitate **personal introductions** to professional leadership; help with follow up
- Participate in select donor meetings
- Engage with social media (post, tweet, follow)



# CONVENE

- Invite prospective donors to **meet** to learn more about the organization
- Host a **parlor meeting** in home or business
- Attend **events** (gala, annual programming); invite friends and prospects to an event



# SUPPORT

- Make a **meaningful gift** to the organization
- Offer guidance on the right gift strategies or materials to present to a donor
- Reinforce gift requests (“**join me**”)
- Support **stewardship activity** (thank you calls/emails)

# CASE STUDY: Parlor Meeting (Advocacy Organization)

## PURPOSE

- To engage high-capacity prospects in fundraising efforts
- To expand donor audience

## STRUCTURE

- Leader hosts a small group of prospects
- Exclusive opportunity to hear from CEO (vision, capital project)
- Leader shares why he/she supports organization
- Clear call to action

## OUTCOME

- Engage new cohort of leaders and supporters through one-on-one meetings and strategic follow up (build momentum)

## CASE STUDY: Parlor Meeting



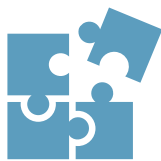
Board member hosted  
parlor meeting



Invited friends and  
colleagues



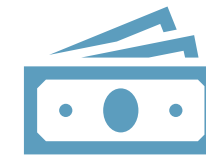
CEO spoke about vision



CEO discussed impact  
of financial investments



Attendee was inspired



Made a meaningful gift  
the next day

# **CASE STUDY: Peer-to-Peer Solicitation (Independent School)**

## **PURPOSE**

- To secure new and increased gifts to the Annual Fund
- To build a strong culture of philanthropy

## **STRUCTURE**

- Established Advancement Committee comprised of major donors to Annual Fund
- Assigned each member a list of families to solicit and solicitation toolkit
- One-on-one meetings with current parents to solicit for Annual Fund

## **OUTCOME**

- Multiply solicitation activity and increase Annual Fund revenue



## CASE STUDY: Peer-to-Peer Solicitation



Recruited and convened  
Advancement Committee



Assigned prospect list  
to Committee members



Provided solicitation  
training and toolkit



Committee members  
invited families to meet



Committee members  
solicited families



Families supported the  
Annual Fund

*(with support from Advancement)*

# Empowering Your Fundraising Ambassadors



Clear  
Expectations



Fundraising  
Toolkit



Education  
Opportunities

# CLEAR EXPECTATIONS

- Written position description
- Expected financial investment and/or time commitment

# FUNDRAISING TOOLKIT

- Talking points (elevator pitch)
- Marketing materials (one-pagers, brochure)
- Case Statement
- Giving societies and benefits
- Event calendar
- Prospect list assignments and action steps

# EDUCATION OPPORTUNITIES

- Fundraising training workshops
- Role playing
- Leadership retreats
- Storytelling workshops



**Say  
Thanks!**

Questions?

# Thank You!

Elizabeth Abel  
Vice President  
CCS Fundraising  
[eabel@ccsfundraising.com](mailto:eabel@ccsfundraising.com)  
(914) 471-2779

[www.ccsfundraising.com](http://www.ccsfundraising.com)