
APRIL 2024

DEMYSTIFYING

THE BOARD & VOLUNTEER'S ROLE IN NONPROFIT FUNDRAISING

EDEN+ Fundraising



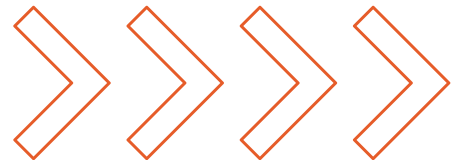
hello!

🔍 NONPROFIT FUNDRAISING ✕

I AM ERIC HEININGER, CFRE
PRESIDENT
EDEN+ FUNDRAISING

You can find me at @ericheininger

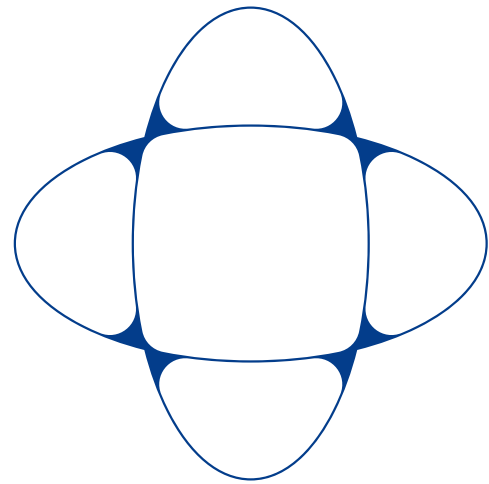




THE ROLE

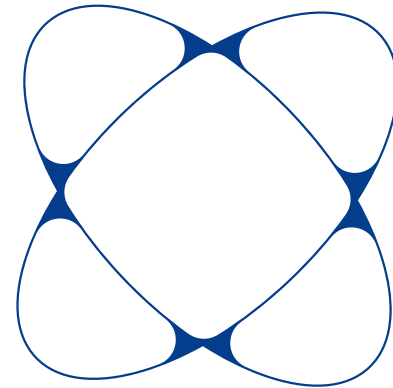
**OF MUSEUM BOARD &
VOLUNTEERS**

legal duties



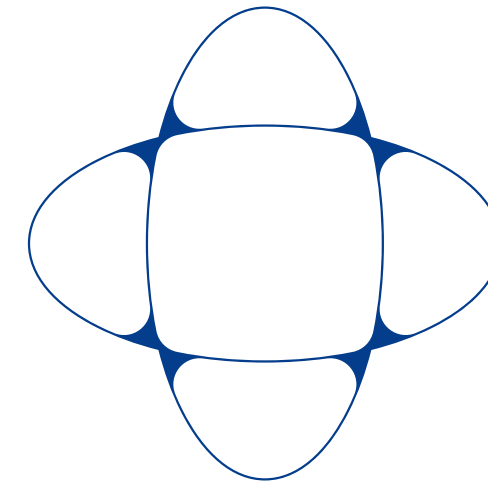
DUTY OF CARE

Actively participate in organizational planning and decision making to make sound and informed judgements



DUTY OF LOYALTY

Put the interest of the organization before any personal or professional concerns to avoid conflicts of interest



DUTY OF OBEDIENCE

Ensure compliance with all applicable federal, state, and local laws and regulations

top 10 rules to basic governance

- 01** Determine mission and purpose
- 02** Select Chief Executive
- 03** Support and evaluate the Chief Executive
- 04** Ensure effective planning
- 05** Monitor and strengthen programs and services
- 06** Ensure adequate financial resources
- 07** Protect assets and provide financial oversight
- 08** Build a competent board and volunteer base
- 09** Ensure legal and ethical integrity
- 10** Enhance the Museum's public standing



costs of ignoring

Q GOVERNANCE



2X

CEO Intention to leave

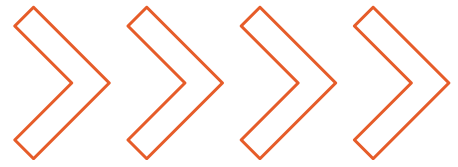
Turnover of key staff/volunteers

Board recruitment timeline

Loss of donor retention

Less growth in program goals

“Fear of failure prevents people from taking action. By removing the fear or the idea of failure the potential is limitless.”



THE TOOLS

FOR SUCCESS

FRAMEWORK for success:

Q POLICIES ×

Policies adopted by the board and implemented by future staff will be the foundation for success.

Q PROCEDURES ×

Managing expectations for activities, tasks, and goals to achieve consistent results.

Q DATA ×

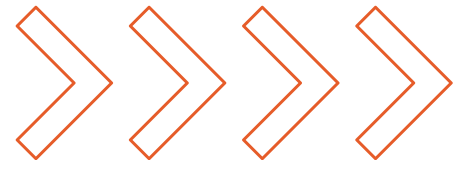
Research, internal records, trends, and forecasts. The board and volunteers should request as much data as they need to do the job well.

Q PLAN ×

An active versus reactive plan as an annual strategy will help all parties understand the need for each step.

Q PRACTICE ×

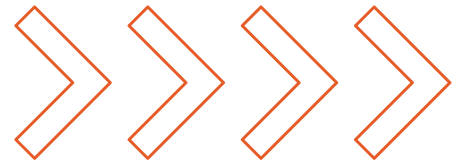
Prepare, practice, and build capacity in your organization.



**BOARD &
VOLUNTEER**

INVOLVEMENT

HOW?



ASK!

THANK YOU CALLS

HOST RECEPTIONS

SOUNDING BOARD

CULTIVATE PROSPECTIVE DONORS

DEVELOPMENT COMMITTEE

SOLICIT PEERS

LEAD FUNDRAISING INITIATIVES

STUFF ENVELOPES

TELL YOUR STORY

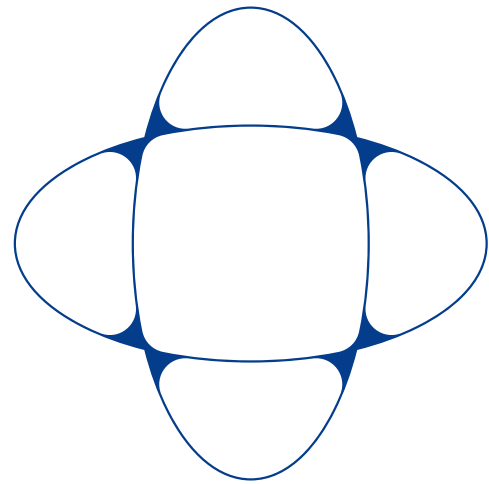
RECRUIT OTHERS

OPEN DOORS TO NETWORK

donation lifecycle

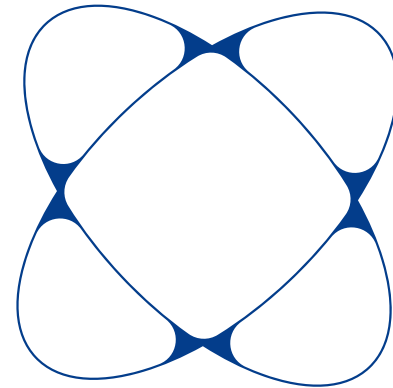


prospecting



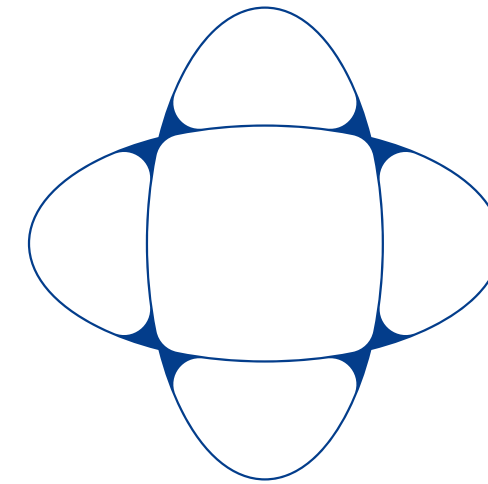
IDENTIFY

Friends, organizations, stakeholders. It all starts somewhere.



RESEARCH

Understanding capacity and potential affinity for the Museum.



EVALUATE

Match data to reality and prioritize.



PAULA GOLD-WILLIAMS

PRESIDENT & CHIEF EXECUTIVE OFFICER AT CPS ENERGY

RELATIONSHIP SCIENCE

RELATIONSHIPS SUMMARY



40% Investment Services & Portfolio Management

22% Power & Utilities

22% General & Rehabilitative Health Care

16% Other

TOP SOURCES

Factory Mutual Insurance Co.

CPS Energy

San Antonio Medical Foundation

Alamo Public Telecommunications Council

PAULA'S RELATIONSHIPS

Arthur Rojas Emerson

President & Chief Executive Officer

Alamo Public Telecommunications Council

Edward B. Kelley

Former President & Chief Executive Officer

USAA Real Estate Co.

Phyllis Browning

Founder

The Phyllis Browning Company

Walter W. McAllister III

Member, Board of Trustees

San Antonio Medical Foundation

Milton B. Lee II

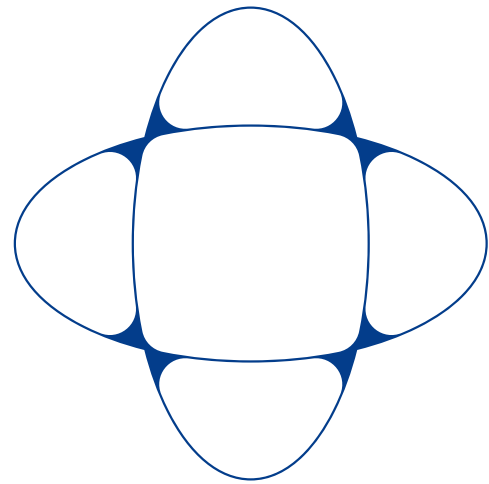
President

Lee Energy Partners LLC

Rebecca Q. Cedillo

President

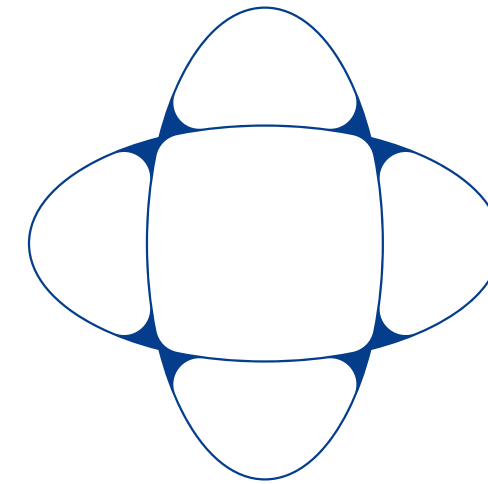
Strategic Initiatives Consulting



DETERMINE

Right person?
Right project?
Right time?
Right amount?

strategy

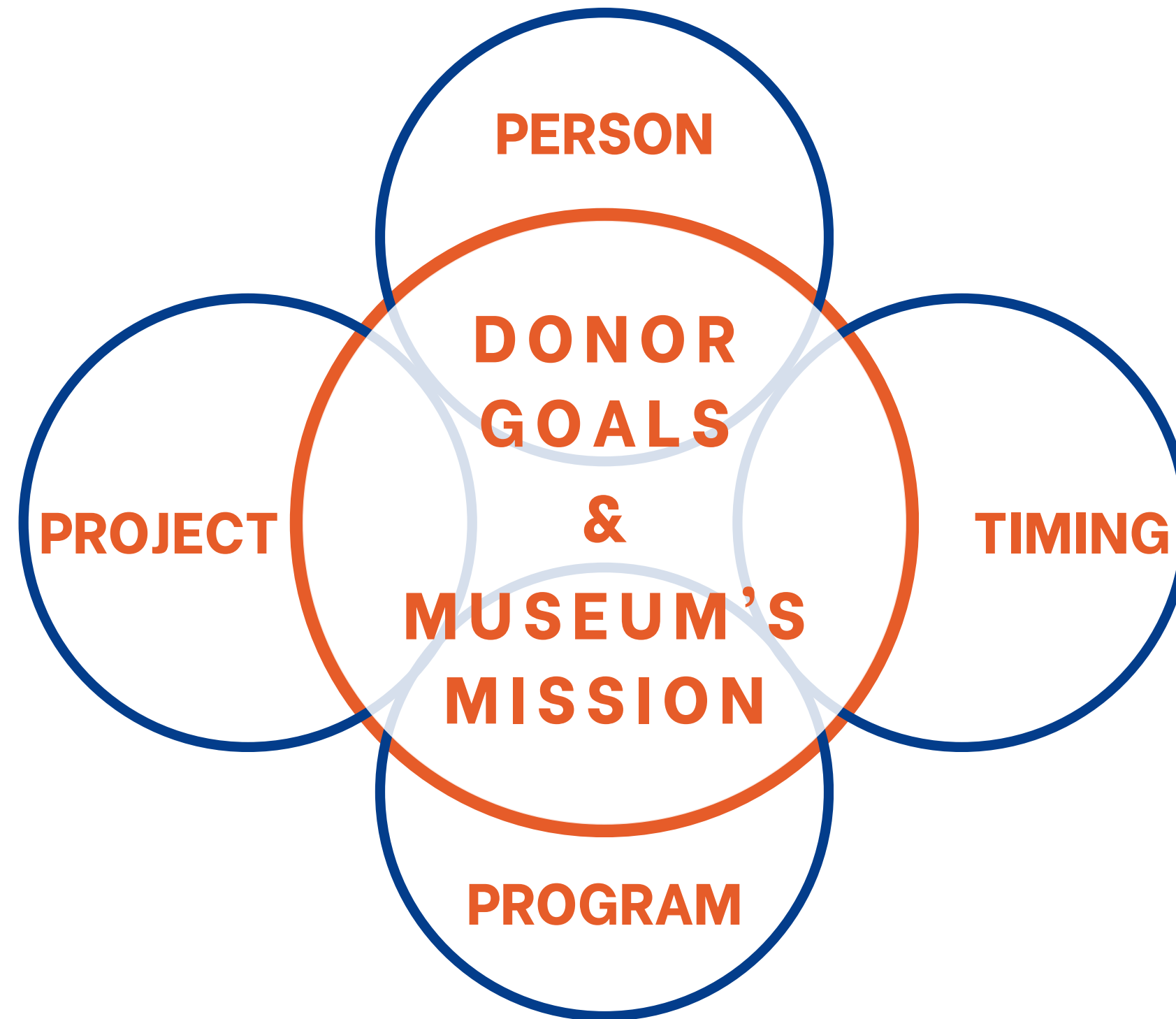


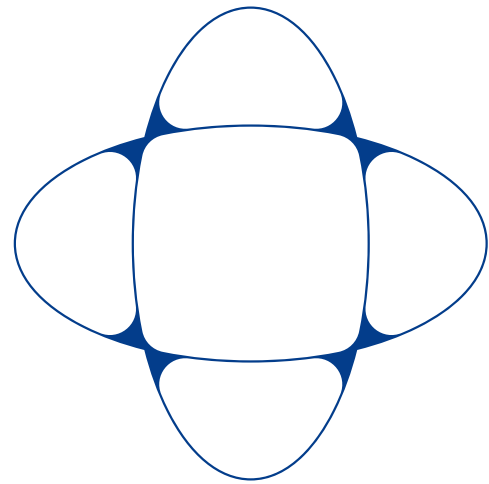
TIMETABLE

Layout a moves
management plan that is
appropriate for each
donor with a set of
responsibilities.



ALIGNMENT

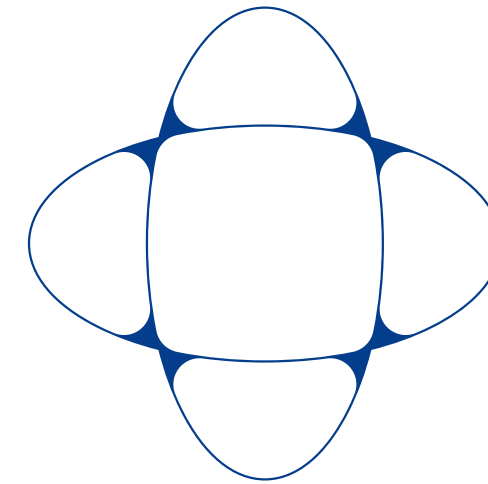




CULTIVATE

Introduce the organization, ask for guidance, explain specific plans.

**building
trust**



REQUEST

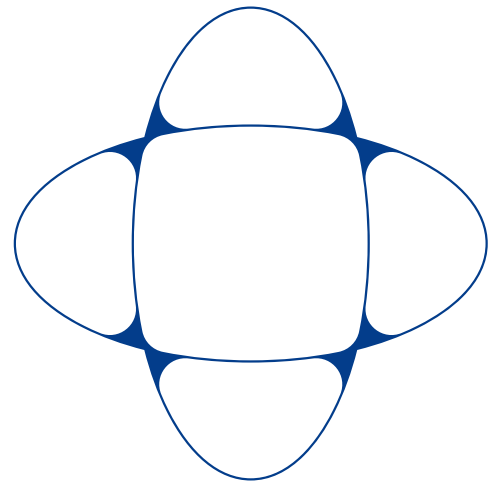
Making the request and inviting a stakeholder to participate in the mission.



CULTIVATION IDEAS

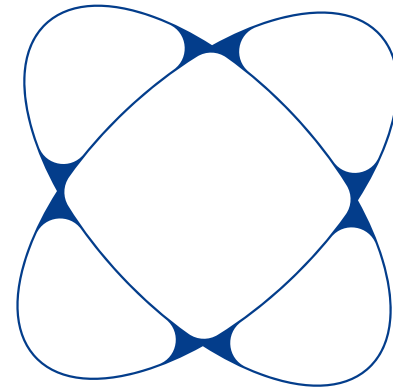
WHAT WORKS IN YOUR
ORGANIZATION?

follow-up



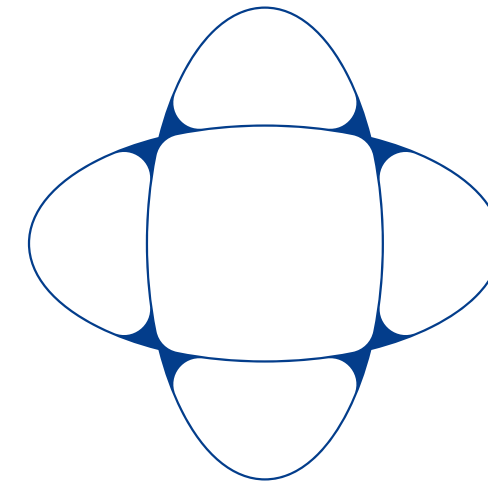
DOCUMENT

Record the important data and secondary details. Ensure accounting requirements.



RECOGNIZE

Gift recognition letters, plaques, press releases, annual reports.



STEWARD

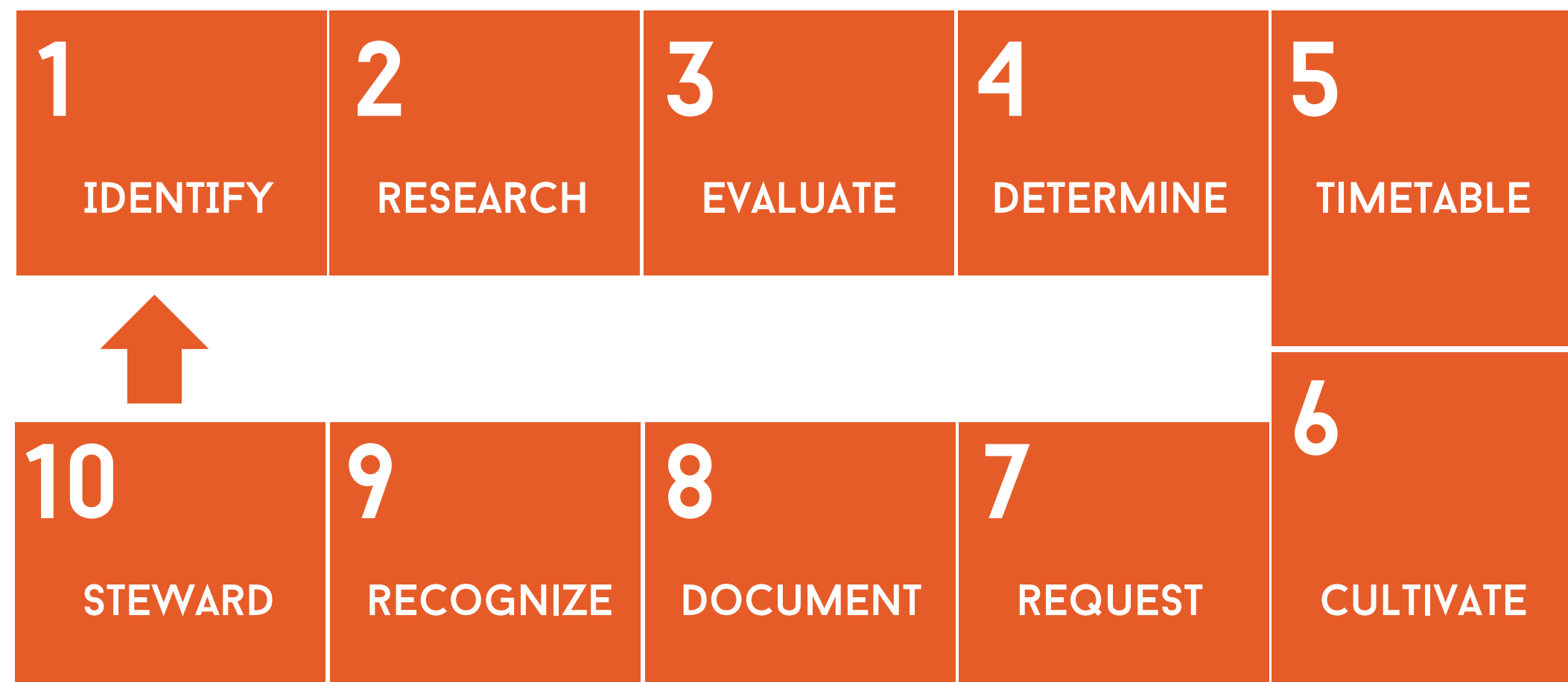
Show the impact of the gift and the gratitude of your organization.

brainstorming activity

How can my board identify more potential donors?

How can my board gather information about potential donors and evaluate them in terms of who to prioritize?

How can my team determine the right person to talk to the potential donor, the right thing to ask for, when to ask, and how much to ask for?
How will the organization keep track of each action step?



How can the Museum thank donors for their gifts and continue building a relationship with them?

How will the Museum document the results of the meeting or ask?

What does the team need to do to prepare to make an ask?

How can the organization engage the potential donor in its work before making an ask?

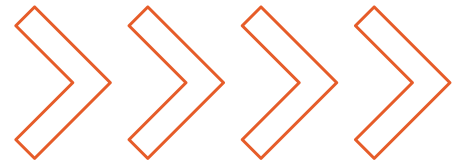


**REQUESTING
A GIFT**

& RESPONSES

a successful request

- 01 Prepare:** Ensure you have the materials, practice, make a gift and understand the needs of the donor.
- 02 Schedule:** Create an intentional setting for discussing important matters.
- 03 Present:** Allow for a dialog and answer questions.
- 04 Ask:** Make a specific request that requires a response.
- 05 Listen and Respond:** Develop a set of next steps for completing a gift.
- 06 Follow up:** Close the loop and show gratitude for their response.
- 07 Report:** Communicate with the organization to provide seamless stewardship.



THE ASK

HELLO [DONOR], THIS IS [YOUR NAME]

TODAY I AM CALLING ON BEHALF OF {THE MUSEUM} TO FOLLOW-UP ON THE LETTER YOU RECEIVED REGARDING OUR CAMPAIGN..

I WOULD LIKE TO SCHEDULE A TIME TO COME TO YOUR HOME TO DISCUSS THE CAMPAIGN WITH YOU (AND YOUR SPOUSE, (IF APPROPRIATE)).

CAN WE MEET ON {DATE} AT {TIME} OR IS {TIME} A BETTER TIME FOR YOU?

prepare and schedule

YES: Great! I look forward to seeing you on (date & time).

NO: I know that the Museum and the entire community would appreciate it if I could just get a few minutes of your time to discuss our plans. I am coming as a representative for them and I told them I would at least start a conversation to understand how people feel about the project.

If yes at this point: Refer to the YES above. If still no, thank them for their time and let them know you hope they can participate later.

If the donor responds by saying, “**I’ll send something in,**” take this opportunity to remind them you would really like the opportunity to sit down with them to talk about the Museum. Do not be afraid to let them know that, as a volunteer, you have agreed to meet personally with each of the families you were assigned.

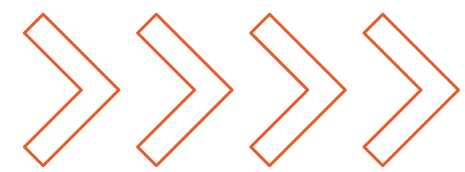
If they still refuse to meet, mention that their participation is critical to the success of the organization.

If the donor responds by saying they are unable to participate, it is very important to open a discussion with them to determine why there is no interest. If they are unable to participate for “financial” reasons, ask them to consider a smaller gift.



before the visit:

Be sure you are familiar with the case/organization, and any relevant information, like past involvement, of the donor.



during the visit:

Introduce yourself and start with small talk.

TIP: CONSIDER YOUR OWN GIFT TO THE ORGANIZATION AND IF IT IS PROPORTIONATE FOR YOUR FAMILY TO THE REQUEST YOU ARE MAKING.

»»»» **during the visit:**

Transition from rapport to case by asking open ended questions:

**"I APPRECIATE YOU TAKING THE TIME TO MEET AND DISCUSS THE MUSEUM TODAY. LET ME ASK YOU, HOW DID YOU FIRST BECOME INVOLVED WITH THE MUSEUM?"
(OR IF THEY ARE NOT INVOLVED/DONOR: "HOW FAMILIAR ARE YOU WITH THE MUSEUM?"**

- The more you can get the donor to express positive feelings about the organization, without persuading them, the better.
- LISTEN! The donor may give strong clues about what they're interested in in the answers to these questions.
- Share your enthusiasm for the organization and how the organization's values overlap with what you've heard from the donor.
- Use your own personality and style. Making a request personal and genuine will be most effective.



THE REQUEST

It is important that you are straightforward and specific. Make the request very personal.

"JOE AND MARY, I AM HOPING THAT YOU WILL HAVE A KEY ROLE IN REALIZING OUR PLAN TO STRENGTHEN OUR ORGANIZATION."

Be sure to ask for the pledge.

"IN ORDER TO MEET ALL THE NEEDS OF THIS PHASE OF THE MUSEUM, WE MUST RECEIVE GENEROUS COMMITMENTS FROM DONORS LIKE YOU."



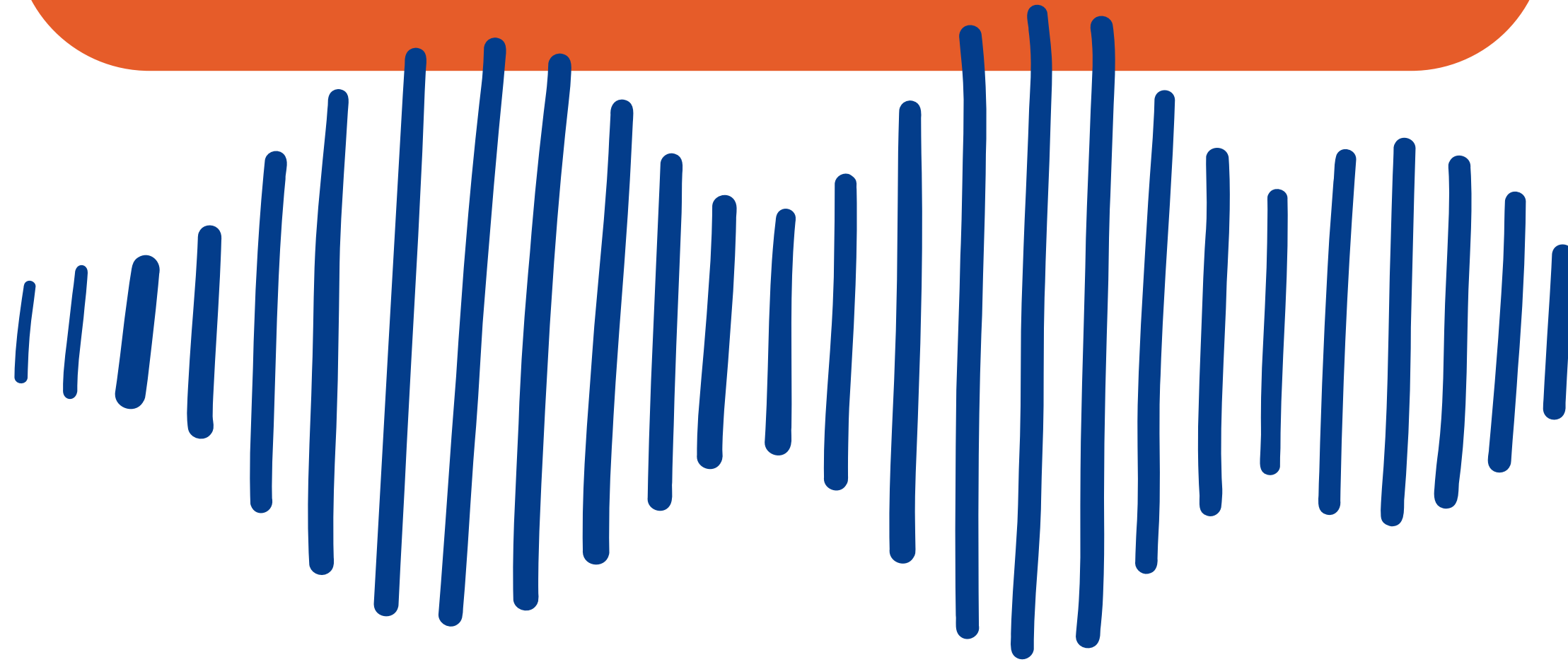
THE REQUEST

JOE AND MARY, WHILE I DO NOT KNOW YOUR OWN FINANCIAL SITUATION, I KNOW THE NEEDS IN OUR ORGANIZATION,

I ASK THAT YOU CONSIDER SUPPORTING MUSEUM WITH A LEADERSHIP GIFT OF \$5,000 THIS YEAR AND A SIMILAR AMOUNT FOR THE NEXT FOUR YEARS FOR A TOTAL GIFT COMMITMENT OF \$25,000.

IS THAT SOMETHING YOU COULD CONSIDER?

LISTEN





WAIT FOR A RESPONSE

ONCE YOU HAVE MADE YOUR REQUEST,
ALLOW THE DONOR THE TIME TO ABSORB
YOUR REQUEST UNINTERRUPTED. YOUR
QUIETNESS WILL SHOW YOUR SERIOUSNESS.

Yes I can do that!

Thank them and immediately ask them to complete their pledge card.

I need time to think about the request.

Immediately suggest a second appointment date for the next week. When you return home, call or email to highlight points discussed and confirm follow-up appointment.

RESPONSES

I will give, but not that much.

You might say “I’m not looking for a decision today. I know you have a great deal to think about. Please spend time considering the request, and let’s meet again in a few days.” Immediately schedule a follow-up visit for the next week.

No, thank you.

Express appreciation for their time. See if anything was misunderstood. Ask that if circumstances change to call you. Leave the door open for future participation.

FOLLOW-UP

🔍 TIMELY

Careful, well-timed follow-up better ensures a gift at the level requested.

🔍 SCHEDULED

The follow-up visit should be scheduled in the next 5-7 days. Make sure to schedule your follow-up visit before leaving the initial visit.

🔍 PLANNED

Have two times & dates in mind that you can offer. This will reflect how serious you are about the success of the campaign and prevent too much time from passing.

🔍 CONFIRM

When you return home from your initial visit, call or email to confirm the follow-up visit and highlight the points discussed during your visit.

thanks!

Any questions?

You can find me at

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EDEN+