

**No Money
No Mission**





WHAT ARE BOARD RESPONSIBILITIES?

Duty of Care

Duty of Loyalty

Duty of Obedience

Function and Structure to Ensure Success

01 Develop Roles & Responsibilities that Make Sense for Your Mission

Positions

Committees

Reporting Structure

Formal Agreements

02 The North Star

Philanthropy

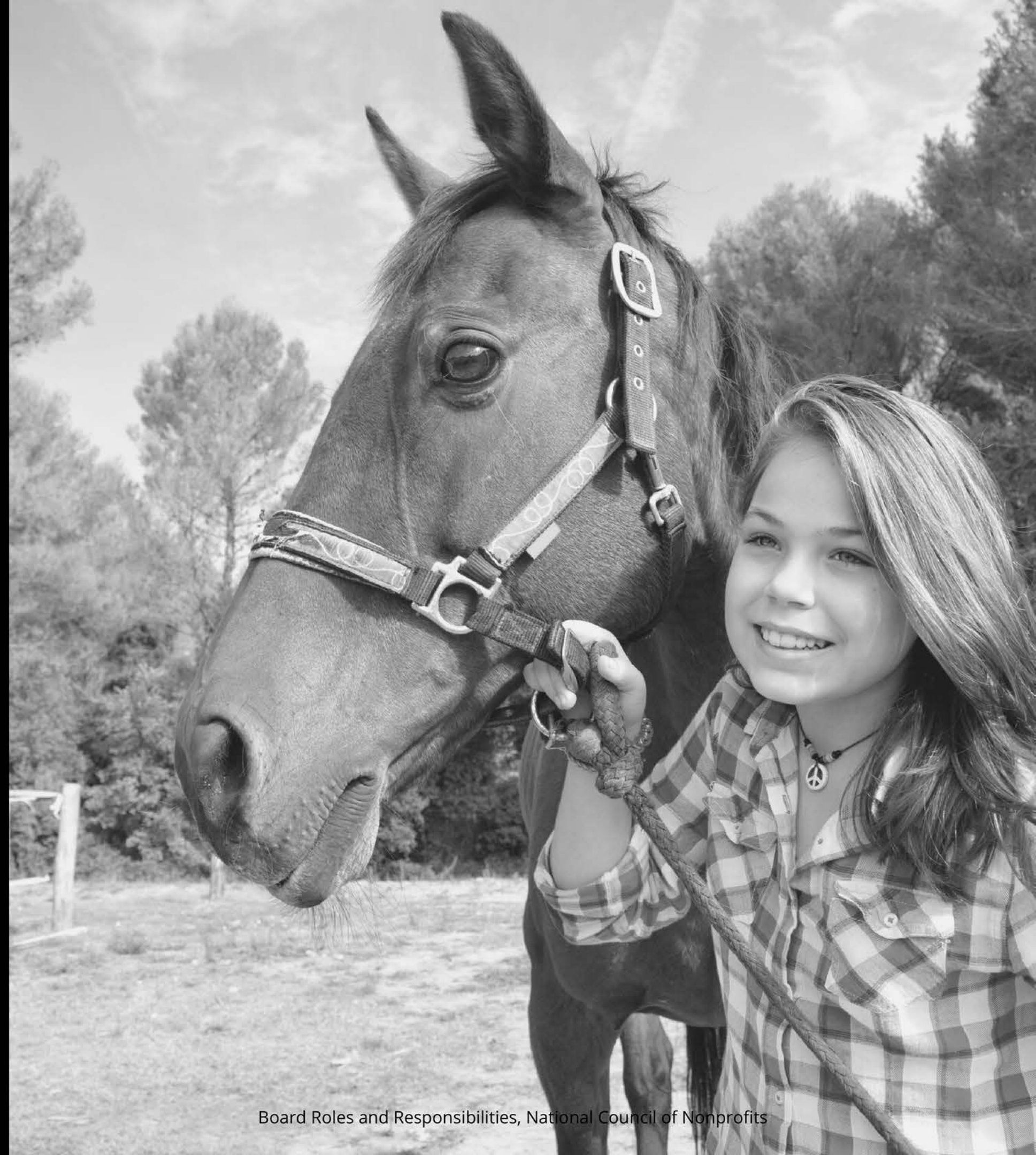
Time

Talent

Treasure

Ties

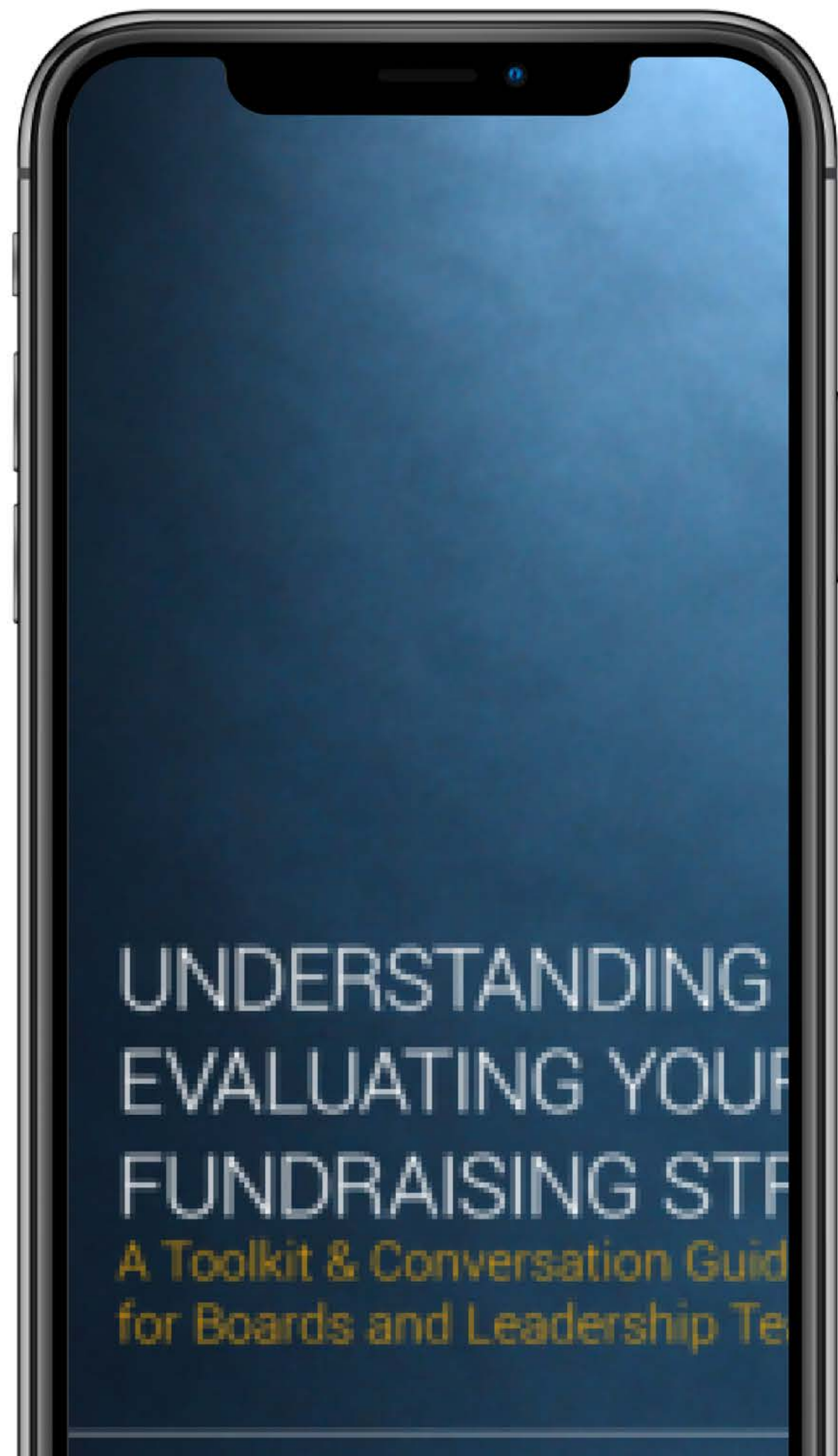
Testimony



Developing Resources

A Balanced Program
Fundraising Strategy
Fundraising Cycle





BoardSource®

RESOURCE

<https://boardsource.org/research-critical-issues/measuring-fundraising-effectiveness/>

BALANCE OF RISK AND REWARD

Understanding and Evaluating
Your Fundraising Strategy: A
Toolkit and Conversation Guide
for Boards and Leadership
Teams



Methods



ANNUAL SUPPORT

Focuses on renew and increasing support from a large group of donors who give in response to a mail, phone, or email campaign.

CtRD: \$0.20

(BoardSource: Understanding and Evaluating Your Fundraising Strategy, 2017)





DIRECT MARKETING

Board outreach to donors or potential donors via mail, phone, email.
Large Volume, Small Gifts

CtRD:

Acquisition \$1.25-\$1.50

Renewal \$0.25



SPECIAL EVENTS

A wide range of event types that bring donors and potential donors together for an event in support of the organization

CtRD: \$0.50



CORPORATE SPONSORS

Support from corporations and others interested in supporting your organization in a way that creates visibility and recognition for them

CtRD: Varies



GRANTS

Support from a foundation, corporation, or public entity to fully or partially underwrite a specific program or the organization as a whole.

CtRD: \$0.20

MAJOR GIFTS

Large scale support from individual donors solicited via personal cultivation and outreach.

CtRD: \$0.05-\$0.10

(BoardSource: Understanding and Evaluating Your Fundraising Strategy, 2017)



PLANNED GIVING

Gifts made to an organization as a part of a donor's estate plan or that require the input of a financial adviser or attorney (as in the case of an annuity or other similar gift)

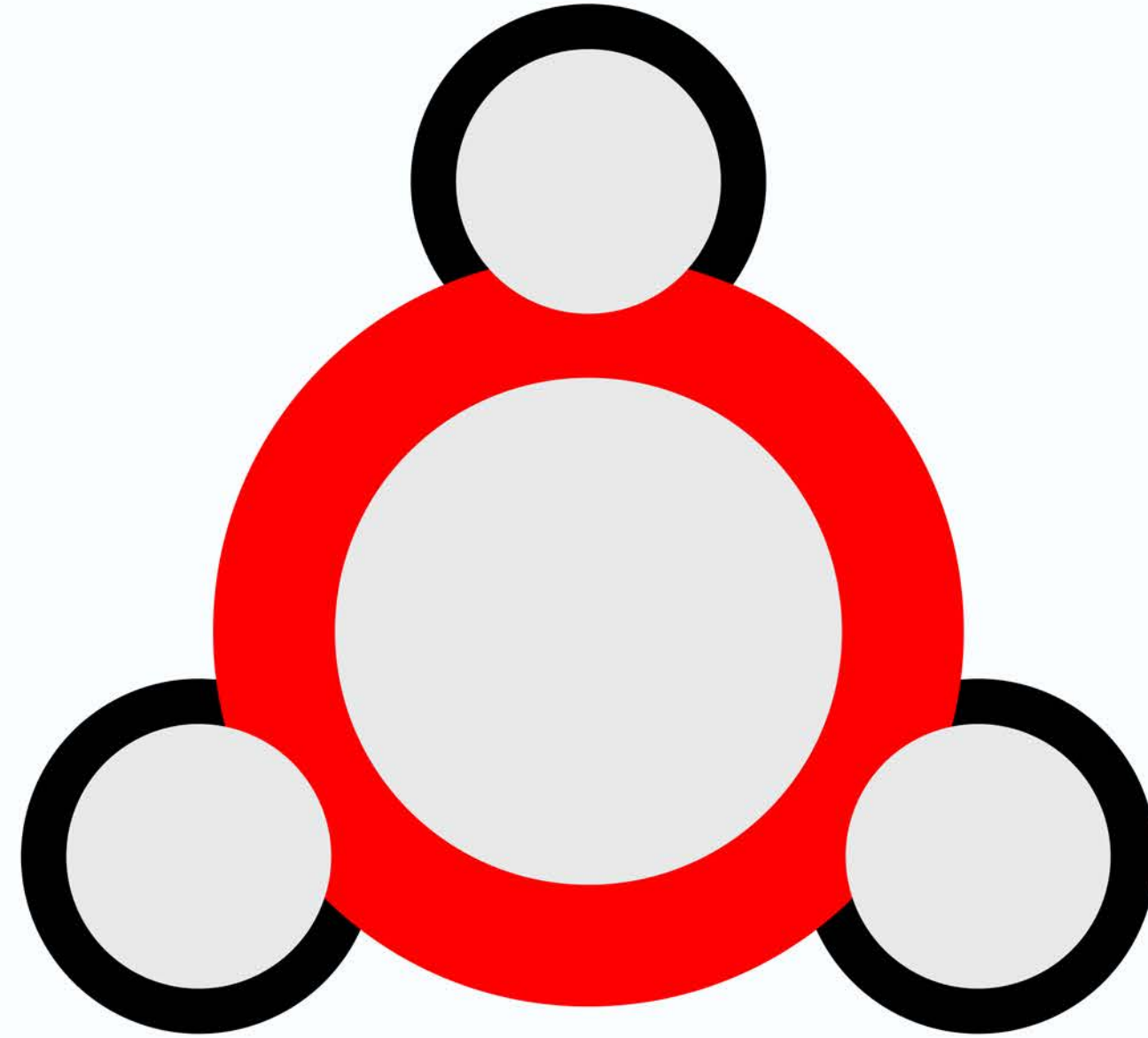
CtRD: \$0.25

(BoardSource: Understanding and Evaluating Your Fundraising Strategy, 2017)



Prospect

Identification, Qualification, Preparation

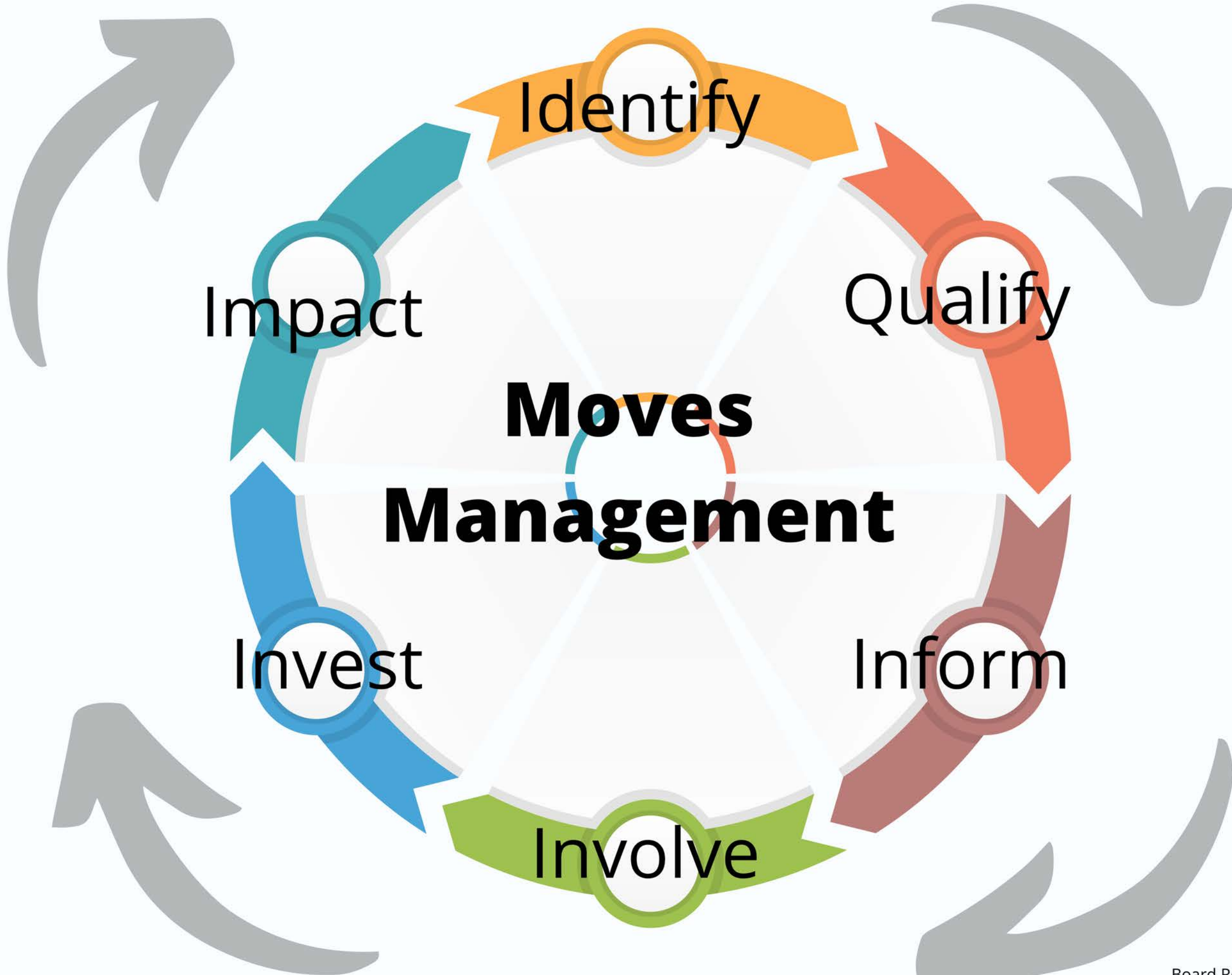


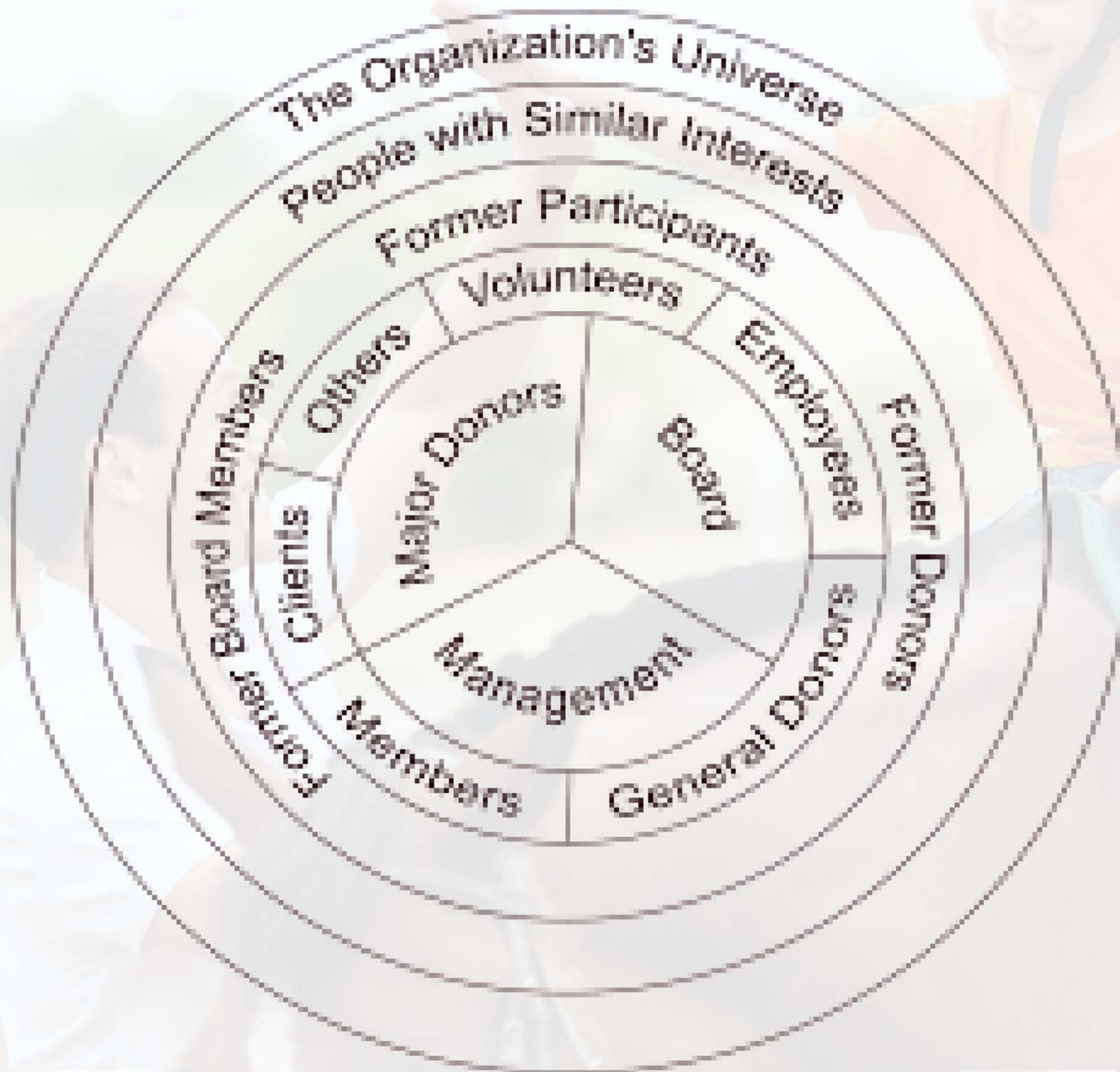
Stewardship

Recognition,
Reporting,
Communication,
Engagement

Cultivate

Relationship Building,
Engagement, The Ask





DONOR QUALIFICATION

Institutional Information
Biographical Information
Community Involvement
Occupation
Assets





STEWARDSHIP

THE RULE OF 7

SUCCESS

The RIGHT person asks the
RIGHT donor for the
RIGHT gift to support the
RIGHT program at the
RIGHT time, and then thanks them
in the
RIGHT way

