

From Board Member to Fundraiser in Five Easy Steps
MNN Conference
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1:45 pm – 3:00 pm
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A Five-Part Training Program for Board Members

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Session One: Laying the Groundwork

- Ensure the board knows the case for giving - why the organization needs to raise money
- How board members tell their own stories – Ask board members why are they on the board of *this* organization? Why are they passionate about it?

Session Two: Transforming Concerns into Advocacy

- Recap of why board members are passionate about the organization
- Discuss why board members give to philanthropic causes.
- Discuss what board members thought of the people who solicited gifts from them for particular causes
- Ask board members their concerns about their fears and concerns about fundraising, and review how to combat them

Session Three: Ambassadorship

- Explaining the difference between “fundraising” and “development”
- Talking about ambassadorship – brainstorm what activities board members can undertake to bring new relationships into the organization and steward outreach to current donors
- What cultivation ideas do board members think have worked for other organizations?

Session Four: Following Up with Potential Donors

- Overview of the past three sessions
- Why lay leaders matter – cachet, networks, influence
- What to say to follow-up on fundraising letters or e-mails in a phone call?
- Look at potential donors – review lists with board members to decide who has connection to whom in order to determine who should receive solicitation materials

Session Five: Face-to-Face Solicitation Training

- Role play with board members –getting the meeting, how to begin, open-ended questions about the subject area of the organization and what matters to them, the ask, dealing with objections
- Give board members their solicitation assignment names and review of additional lists
- Discussion of what the organization will send to the solicitors ahead of the board member’s contact