The Land Trust Board Playbook:
Building Strong Relationships to Further Fundraising Success

Southeast Land Conservation Conference – St. Simons, GA
Thursday, March 15. 2012; 1:30-4:30 p.m.

Workshop Agenda

1:30 p.m.	Welcome, Goals for the Afternoon, Introductions	Bryan, Illene
1:40 p.m.	Never Ask a Stranger for Money: Relationship-Based Fundraising • with institutions • with individuals ○ Pyramid of Giving	Illene
	Board Engagement (and Staff Role) in the Fundraising Cycle • planning • prospecting • cultivating • soliciting • stewarding	Illene/small group discussion
3:10 p.m.	Break	
3:20 p.m.	Fundraising From the Board's Perspective: Panel of Land Trust Board Members	Bryan facilitate
3:50 p.m.	Idea Swap: Successful Fundraising Techniques	Illene facilitate
	LTA Board Services Initiative* • services available • policy coordination	Bryan
4:20 p.m.	Final Discussion, Wrap Up, Evaluation	Illene

*May be unnecessary if largely the same audience as in the a.m.

Presentation provided by:

Illene Roggensack, Third Sector Innovations
www.thirdsectoronline.com thirdsec@earthlink.net 800.406.7274, 970.241.1139

Bryan Martin, Land Trust Alliance
www.lta.org bmartin@lta.org 303.519.2027

Outreach and Relationship Development Opportunities for Board Members

Board members have a unique opportunity to contribute to the success of an organization through formal and informal marketing opportunities. Board members, individually and collectively:

- Give credibility and prestige to an organization
- Inspire confidence in the services offered
- Are the conduit of understanding and interpretation between the organization and community
- Focus on social reform, the agency's part in that and the overall benefit to a community.

Essential questions that must be answered affirmatively for board members to effectively represent and garner resources include:

- Do board members know and understand the mission of the organization?
- Are board members enthusiastic about the work of the organization?
- Do board members have a plan for the future of the organization, and are they familiar with the direction being taken?
- Are board members knowledgeable about the organization's current programs and services?
- Are board members aware of similar service providers in the community, and the unique niche/role of the organization within this continuum of service providers?
- Have board members been trained in the "major selling points" of the organization?
- Do board members have good promotional materials available for distribution to others?

Opportunities to "sell" the organization to others are plentiful, and are easily taken advantage of when a board member is prepared. They often are not done "solo," but may include another board or staff person. Examples of such opportunities include:

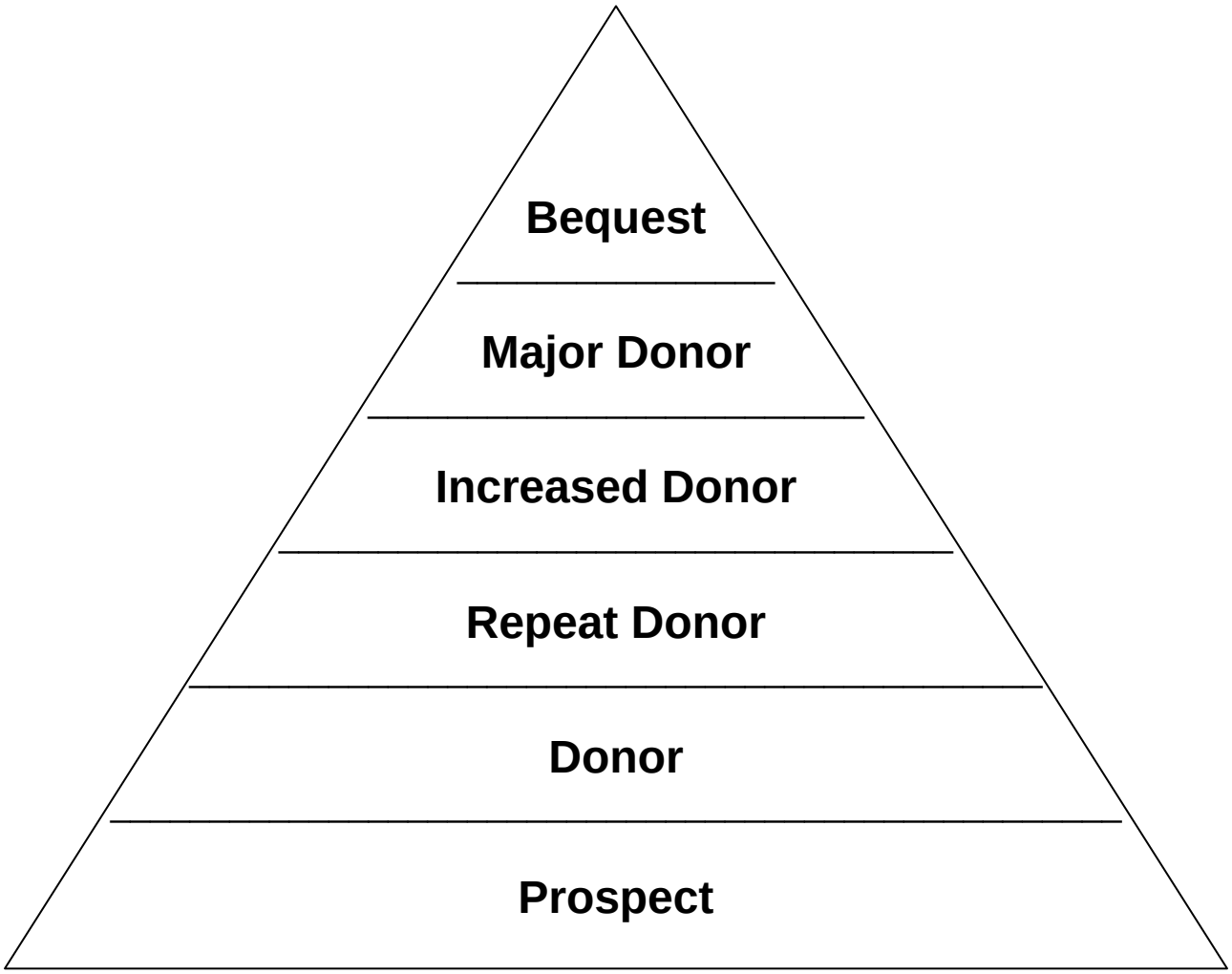
- Representing the organization in presentations to/meetings with potential funders
- Representing the organization at others' special events
- Being part of a speaker's bureau for presentations to service clubs, etc.
- Being cognizant of community or media happenings, etc. that could involve exposure for the organization
- Telling friends and family about the needs of the clients (<u>not</u> of the organization)
- Including information on the organization in other newsletters and publications with which you are affiliated.

The Pyramid of Individual Giving

Individuals provide nearly 83% of all charitable gifts in America. This number includes gifts upon death (bequests in chart below). Individuals are almost exclusively responsible for giving to religious organizations, which continues as the largest dollar category of giving.

Individuals also are unique in that they generally offer:

- long-term funding and growth potential
- quick turn-around time to your receiving funds
- you have the ability to impact funding decisions
- minimal reporting requirements, minimal demands on how money is spent
- additionally may be a good source of volunteers and introduction to other donors



The pyramid demonstrates how donors move up to become more involved in the organization's life. It also typically is illustrative of the lifecycle of the organization – the more mature and institutionalized the organization, the more likely it is to be working at the top of the pyramid.

Each level of giving requires a different strategy to develop and sustain. Each also requires a strategy to move donors to the next level. Most nonprofit organizations "stall out" at various levels.

Donor/Prospect Strategy-Development Information

Use the following questions/similar to profile prospective and major donors. Ideally, this information will be kept in a well-maintained database, but store only information that you are willing and comfortable for the donor/prospect to see.

Name:

Address/Phone:

Referred by:

Community Affiliations/Significant Donations:

“Connections” to Our Organization (people, involvement):

Best Person/Team to Pursue:

Capacity ($):

Donor Type (Behavioral Style):

“Product” We Have to Sell to Donor:

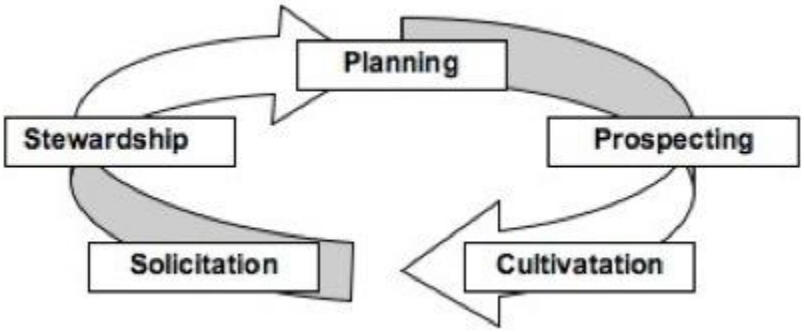
Development Strategy (How):

Development Schedule (When):

Recognition and Follow-Up Strategy:

Other:

The Fundraising Cycle



Evaluation and Planning:

Research and Prospecting:

Cultivation:

Solicitation:

Stewardship:

Fund Development by the Board of Directors

Why do Leaders Serve on Boards of Directors?

- The right person asked
- Pride of association
- Responsible concern for community
- Your organization's cause

Attributes of a Good Fund Raising Board

- Influence
- Affluence
- Credibility
- Respect
- Outreach
- Business Expertise

The Board Role in Fund Raising

- Planning
- Outreach and Advocacy
- Recruitment
- Charitable Giving
- Committee Work
- Solicitation

Practical Ways to Engage the Board in Meaningful Fund Raising

- Treat as You Treat Other Volunteers
- Provide Structure
- Create Environment for Success
- No Unnecessary Meetings
- Have and Clarify Expectations
- Make Sure That Members Know the Product/Benefits
- Provide Effective Training
- Provide Effective Tools

Keep in mind that 88% of people are willing to volunteer for our organizations, yet half turn away because they do not feel welcome, that their work is not meaningful, that there is no structure for their involvement, etc.

Board of Director Members' Fundraising Interests Form

Note: Modify to list the specific areas of fund raising activity with which your organization is involved.

	Like/ Will Do	Don't Like	Don't Know Try Me!	I'll Find Others To Help
Constituency Development				
Brainstorm to bring in names	_____	_____	_____	_____
Bring in list of personal contacts	_____	_____	_____	_____
Brainstorm ways to involve my contacts	_____	_____	_____	_____
Help cultivate these relationships	_____	_____	_____	_____
Write letters to my personal contacts	_____	_____	_____	_____
Call my personal contacts	_____	_____	_____	_____
Call donors and thank them personally	_____	_____	_____	_____
Call donors and ask them questions	_____	_____	_____	_____
Write donor surveys	_____	_____	_____	_____
Host donor reception	_____	_____	_____	_____
Face-to-Face Solicitation				
Organize campaign	_____	_____	_____	_____
Recruit volunteer solicitors	_____	_____	_____	_____
Do team solicitation with someone else	_____	_____	_____	_____
Brainstorm prospect names	_____	_____	_____	_____
Bring in my own list of personal contacts	_____	_____	_____	_____
Solicit my own contacts	_____	_____	_____	_____
Let others talk to my contacts	_____	_____	_____	_____
Help determine gift amount to ask	_____	_____	_____	_____
Go to groups and make presentations	_____	_____	_____	_____
Solicit people I don't yet know	_____	_____	_____	_____
Phone-a-Thon				
Organize phone-a-thon campaign	_____	_____	_____	_____
Write solicitations script	_____	_____	_____	_____
Brainstorm names of prospects	_____	_____	_____	_____
Bring in my own list of contacts	_____	_____	_____	_____
Call my own contacts	_____	_____	_____	_____
Call other prospects	_____	_____	_____	_____
Process pledges at phone-a-thon	_____	_____	_____	_____
Special Events				
Plan event	_____	_____	_____	_____
Serve on organizing committee	_____	_____	_____	_____
Brainstorm guest names	_____	_____	_____	_____
Invite my own contacts	_____	_____	_____	_____
Sell tickets to my own contacts	_____	_____	_____	_____
Work at the event	_____	_____	_____	_____
Serve as host and mingle at event	_____	_____	_____	_____
Direct Mail				
Organize direct mail campaign	_____	_____	_____	_____
Write letters	_____	_____	_____	_____
Brainstorm names of prospects	_____	_____	_____	_____
Bring in my own list of contacts	_____	_____	_____	_____
Sign letters to my own contacts	_____	_____	_____	_____
Have others write letters to my contacts	_____	_____	_____	_____