

# **Literacy Boot Camp: Board and Fund Development**

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## Board Development – Planning

- **Identify Needs**
  - Define who/what skill sets/profiles are needed
    - Skills sets: lawyer, accountant
    - Who: Corporate (VP or above) representatives. Representatives from organizations/agencies with which you would like to work
    - Profiles: Political connections? Diversity?
- **Define Requirements of a Board Member**
  - Length of Term
  - Service on Committees
  - Financial Responsibility
- **Have a plan with targets**
  - Overall Board goals
  - Assignments for Board Members and Key Staff



## Board Development – Preparation

- **Board Recruitment: Materials**
  - Professional –looking recruitment packets/materials
  - Board Member Handbook
  - Board Member business cards
  - Board Member “want ads”
- **Train All Board Members, Key Staff and Stakeholders**
  - Talking points (organization level)
  - Elevator Speech (Board member/personal level)
  - Board/Staff “Tag Teams”
    - Board Member – “why this is important to me”
    - Staff Member – “what we do”



## Board Development – Process

- Board Recruitment is a constant process
  - Develop/maintain a list of prospects
  - “work the prospect list” – have recruitment plans for key prospects
- Create a pipeline of future board members
- Set up a “Speakers’ Bureau” to cover community meetings, organizations, events
- Use Board Committees, individual service opportunities and events as part of the recruitment process
  - Allows the organization and the potential Board Member to determine if there is a “fit”
  - Invite the prospect to an event → Ask the prospect to be part of the planning group for the next event → Ask the prospect to join a Committee → Ask the prospect to join the Board

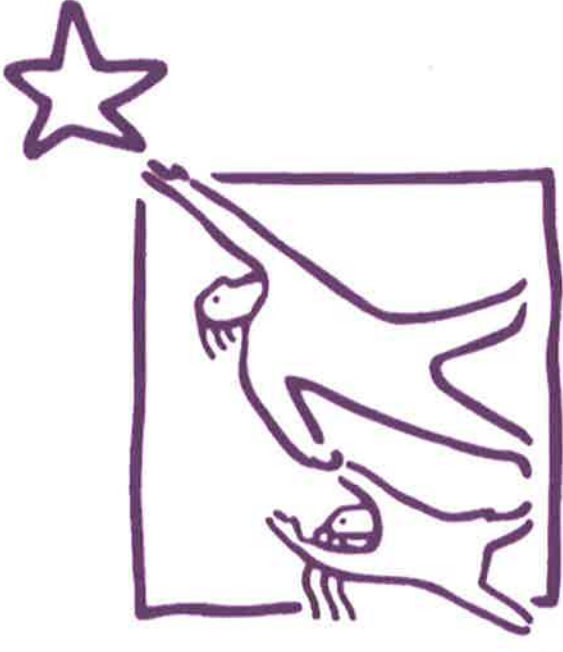
## Board Development – Sources of Board Members

- **Contacts of existing Board Members**
  - Compare your “wish list” to who you know
  - Six degrees of separation (or Kevin Bacon)
- **Advertise**
  - Volunteer Match
  - Leadership Programs (independent; college-based)
  - Social Media
  - Newspapers, online, programs, etc.
  - Chambers of Commerce, Service organizations
- **Corporate Programs**



## *What works for Board Development works for Fund Development*

- **Identify your needs: Set financial goals**
- **Have a strategic and a tactical plan**
  - Short and long term goals
  - Specific targets with dates and assignments
  - Explore opportunities and ideas
  - Diversify sources of funding/methods of fund
- **Measure progress against your plan**
  - What is working? What is not working?
  - Revise, recalibrate your plan



## Fund Development Strategies

- **With and without a 501 (c) 3 – Satellite organization**
- **Individual Donors**
  - General campaigns
  - Large donors
- **Corporate Donors**
- **Grants**
- **Events**
- **Entrepreneurial Activities**
  - Fee for Service
  - Selling items
  - (Gallery U Boutique)





## Fund Development – Donor Identification

- Donor Identifier
  - Review all past donations, stakeholders, friends
  - Who has attended past events?
  - Past, present and prospective board members
  - Clients (book clubs, tutors/students)
  - Who do you know? Who can you meet?
- Tracking mechanism and standard processes
  - All key information in one place. Can be simple (spreadsheet) or more elaborate (specialized software)
  - Standard thank-you mechanism; 48 hour target
- Develop prospect list
  - Those who have donated in the past (target to upgrade)
  - Those who have not yet donated, but have high potential





## Fund Development – Donor Cultivation

### *Long-term strategy with some short term tactics*

- Mailings
  - 2 types:
    - Informational, engagement - newsletters, updates
    - Ask – annual appeal
  - Create a schedule with the right amount of “touch”
    - Hard copy – snail mail
    - Electronic (email, “Constant Contact”)
    - Posted via social media
- “Donate” mechanism on your website
- Donor cultivation events
  - Identify a particular constituency (e.g. gathering of local book clubs)
  - Hold an event (meet & greet of multiple book clubs)
  - Gather names, interests, etc. but do not necessarily make an “ask”



## Fund Development – Strategic Donor Cultivation

- Review list of existing and prospective donors
  - Know your constituents, for example...
    - Where do your students work?
    - Are there some key employers in common?
  - Identify those that are transactional/smaller \$
  - Identify those with longer term potential for higher \$
    - Corporate matching plans
- Create a generic plan for the transactional donors
- Create a strategic plan for donors/prospects with greater giving potential

## Fund Development – Donor Cultivation/Stewardship *Cultivation and Stewardship Go Hand in Hand*

- **Board President/Fund Development Chair:**
  - Annual Personal Ask to each Board Member, Board Committee Person and other Key Stakeholders
  - Personal Call/Thank you for each donation over “\$X”
  - Periodic contacts with key donors & prospects – personal invites to events/activities; special “acknowledgment” events
- **Board Members/Fund Development Committee Members:**
  - Assigned lists of prospects to solicit or thank (donors between “\$ x and X)
  - Personal call; personalized letters
  - Not every Board Member may be comfortable
- **Tutors/Students:**
  - Engage their support in stewardship – thanking people with a personal story

