



# GETTING THE MOST OUT OF YOUR BOARD AND VOLUNTEERS

7 July 2021



# TODAY'S AGENDA

- I. Introductions
- II. Today's philanthropic landscape
- III. Getting the most out of your Board and volunteers
- IV. Next steps and discussion

# INTRODUCTIONS

# OUR CONVERSATION PARTNERS



**Sarah Krasin**

Senior Vice President  
CCS Fundraising



**Tyler Mark**

Senior Director  
CCS Fundraising



**Charlie Michaud**

Principal & Managing  
Director  
CCS Fundraising

# ABOUT CCS

CCS is an international fundraising consulting firm that partners with nonprofits for transformational change.

Our areas of expertise include strategic counsel, capital and endowment campaigns, leadership giving, development assessments, and data analytics.



Innovator in the field of fundraising for **7 decades**



Partners with **500+ nonprofits** annually worldwide



Largest professional staff with **300+ full-time employees**



# OUR SERVICES



CAMPAIGN  
MANAGEMENT



FEASIBILITY &  
PLANNING



INTERIM  
MANAGEMENT



ASSESSMENTS &  
AUDITS



STRATEGIC  
PLANNING



CRISIS  
RESPONSE



RESEARCH &  
DATA ANALYTICS



LEARNING &  
TRAINING

# A SELECTION OF CLIENTS



Lions Clubs International  
**FOUNDATION**



**ELIMINATE**

Kiwanis eliminating maternal/neonatal tetanus



 **EMORY**  
**WINSHIP**  
**CANCER**  
**INSTITUTE**  
National Cancer Institute-Designated  
Comprehensive Cancer Center



 **The Global Fund**  
To Fight AIDS, Tuberculosis and Malaria

 **DukeHealth**

**AFRICA CDC**  
Centres for Disease Control and Prevention  
Safeguarding Africa's Health 

**AMNESTY**  
INTERNATIONAL



 **UNITED NATIONS**  
**FOUNDATION**  
Connecting you with the United Nations

 **CDC Foundation**  
Together our impact is greater

 **ACTION**  
**AGAINST**  
**HUNGER**

**BILL &**  
**MELINDA**  
**GATES**  
*foundation*

 **OXFAM**

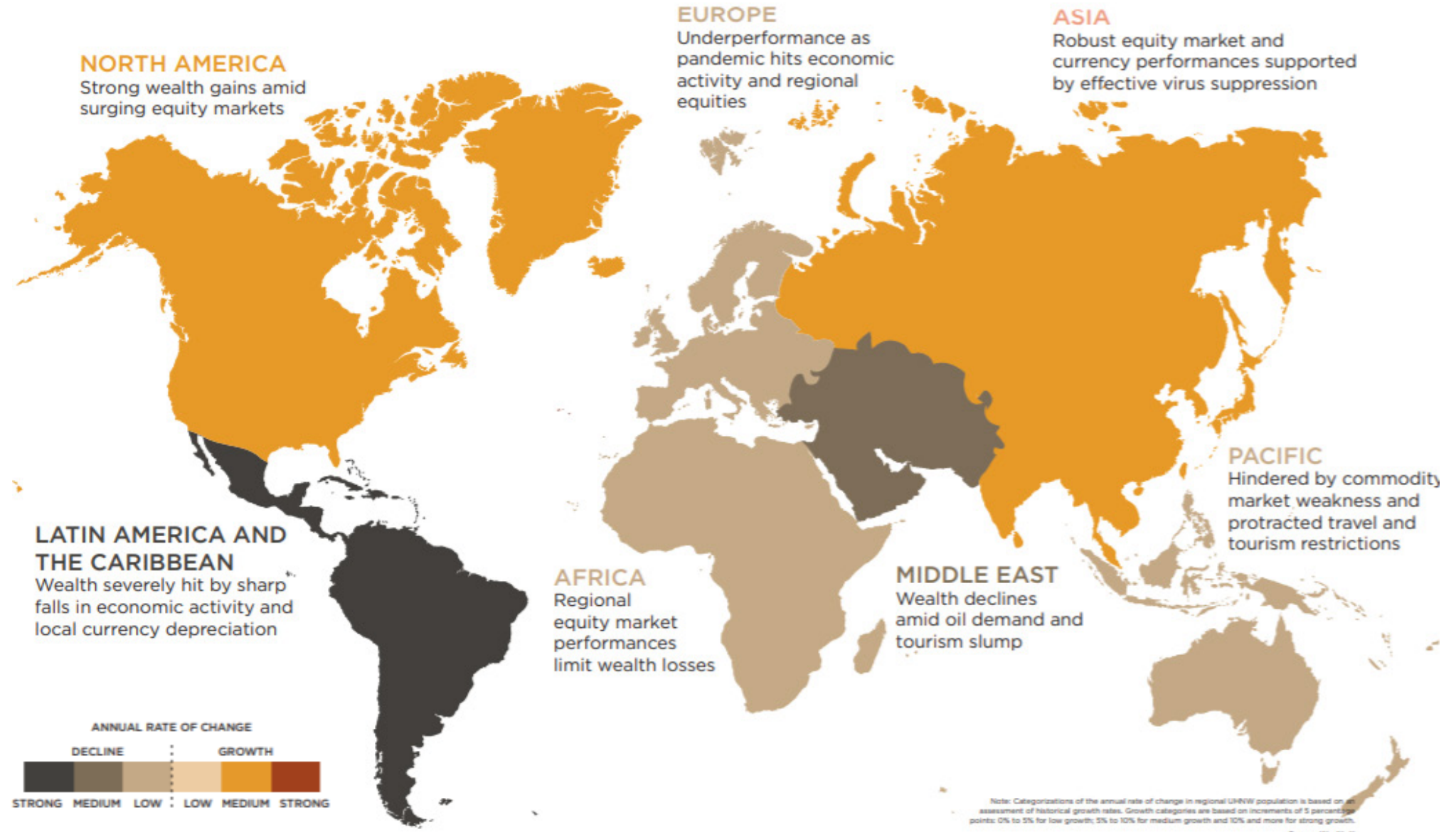
 **Habitat**  
for Humanity®

**Rotary** 

# TODAY'S PHILANTHROPIC LANDSCAPE



# INTERNATIONAL TRENDS IN WEALTH

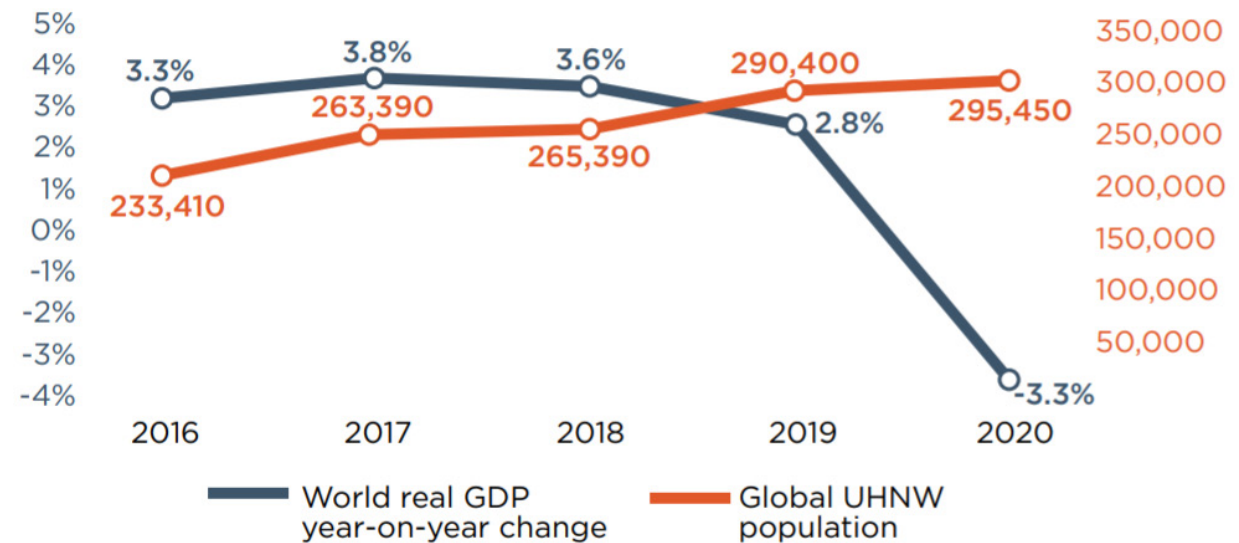


Source: *Wealth-X World Ultra Wealth Report 2021*

# INTERNATIONAL TRENDS IN WEALTH

- The global UHNW population grew 1.7% in 2020 to 295,450 individuals
- Combined net worth for this population increased by 2% to \$35.5 trillion
- Best-performing regions: North America and Asia
- With a third of UHNW population over 70, many are spending a larger proportion of their time on philanthropic initiatives
- Philanthropy is by far the most popular interest among UHNW women

GROWTH OF THE WORLD'S ULTRA WEALTHY POPULATION



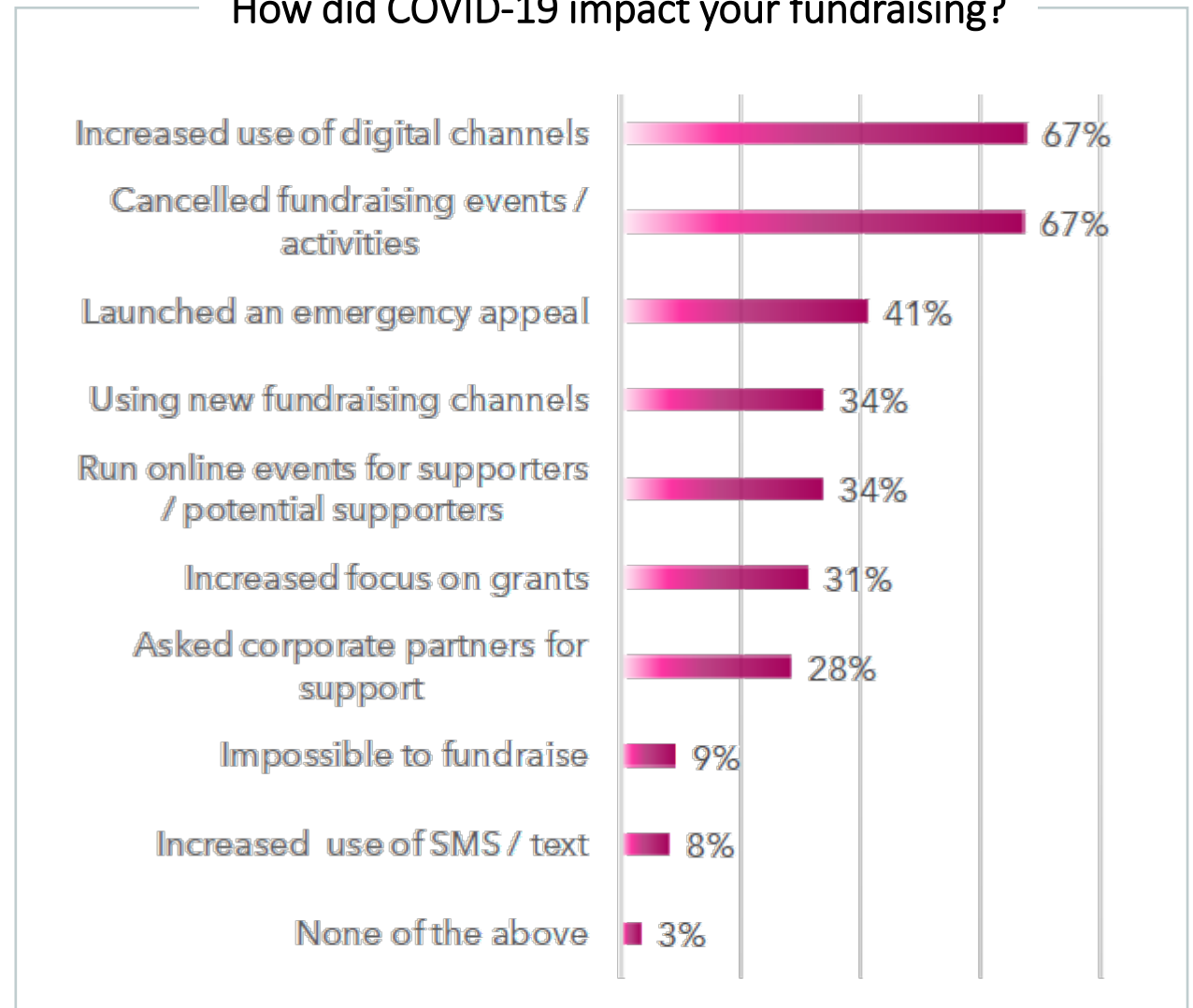
# IMPACT OF COVID-19 IN EUROPE

- Since the pandemic struck, **nonprofits have ramped up their use of digital** to raise funds, engage with supporters and deliver services.
- **65%** of organisations have found **new ways to deliver services**, with an increase in those being offered online.
- 47% of organisations reported **an increase in money donated online**.

## TOP 3 CHALLENGES CITED:



## How did COVID-19 impact your fundraising?



# UNPRECEDENTED FUNDRAISING STRATEGIES



Nonprofits innovated to provide virtual services and fundraising programs



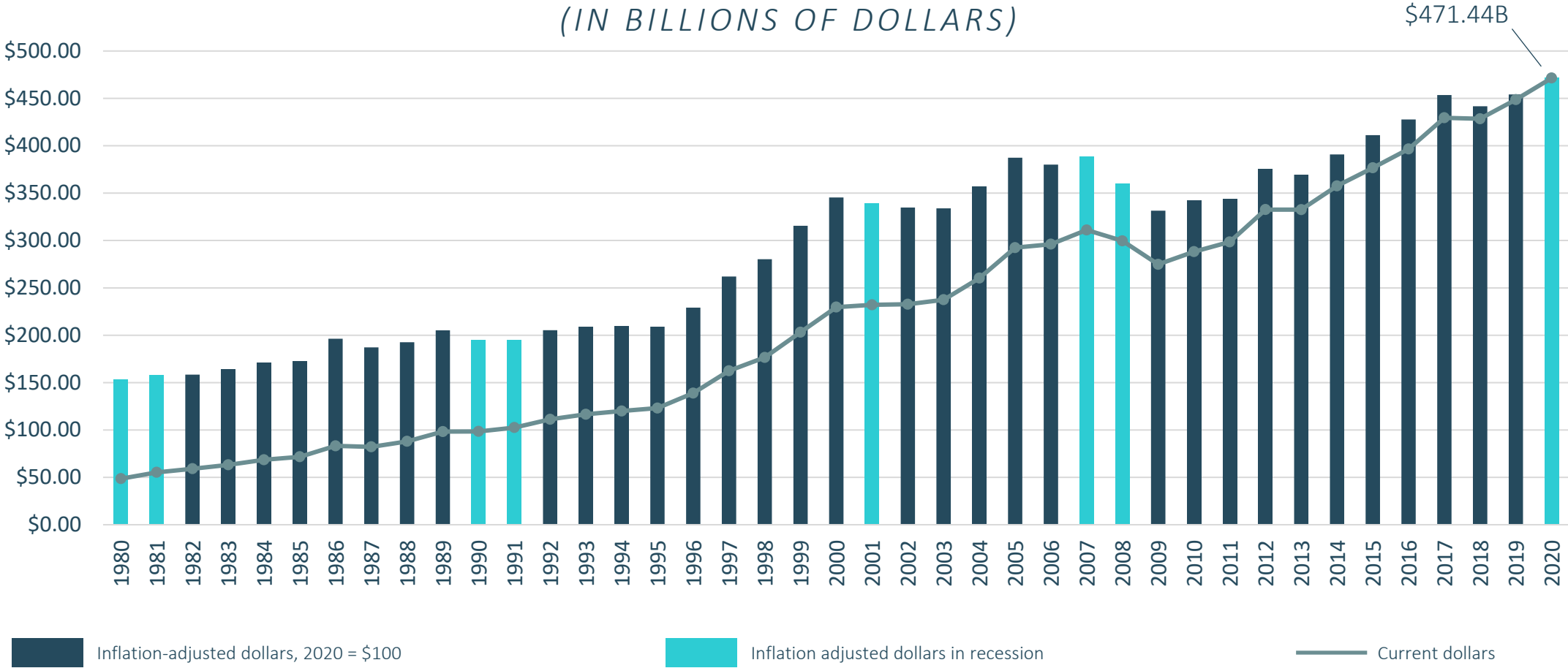
Online giving reached its highest share of total giving on record



Nonprofits experienced an influx of new donors

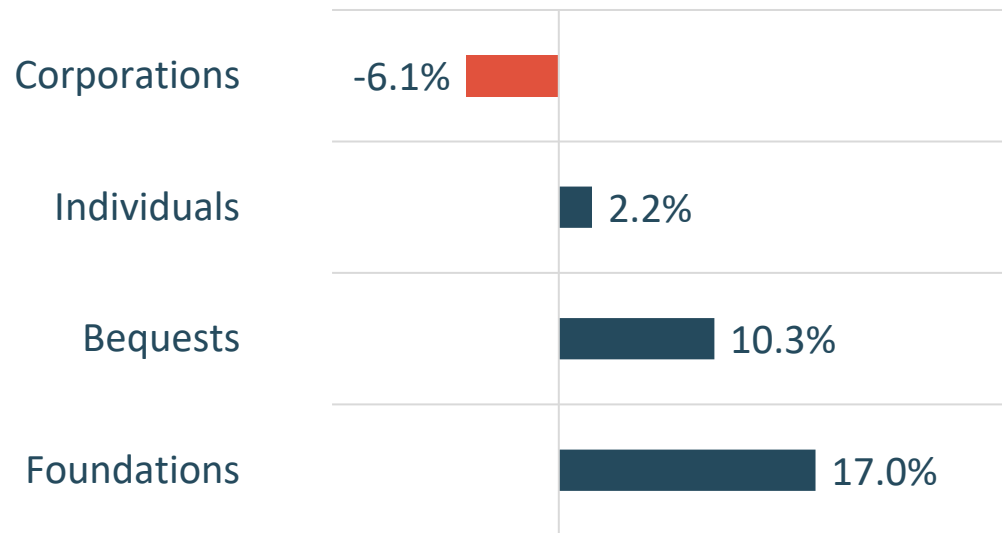
# GIVING IN U.S. REACHED A RECORD \$471.44 BILLION IN 2020

TOTAL GIVING 1980-2020  
(IN BILLIONS OF DOLLARS)

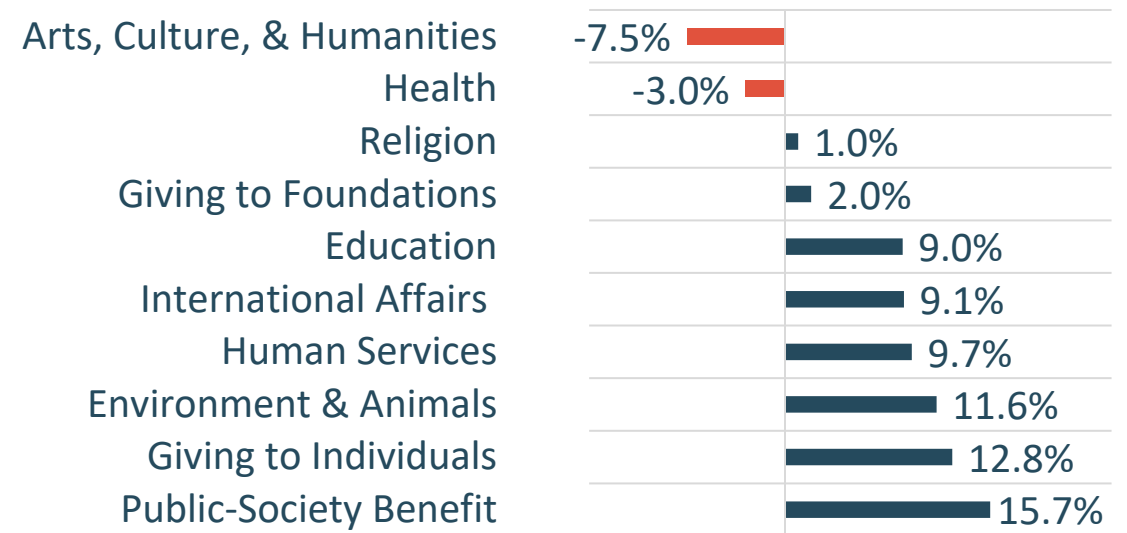


# YEAR OVER YEAR CHANGES: SOURCE AND RECIPIENT TYPES

## YOY CHANGE, BY SOURCE



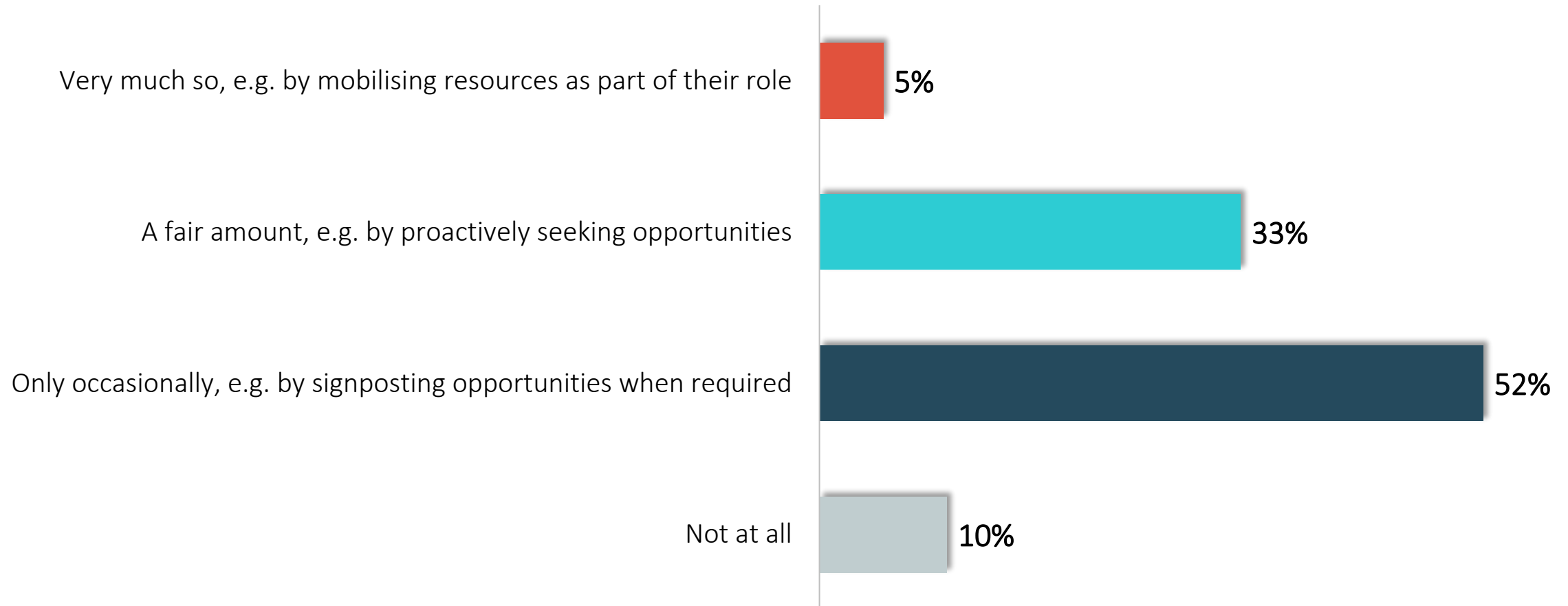
## YOY CHANGE, BY RECIPIENT



# GETTING THE MOST OUT OF YOUR BOARD AND VOLUNTEERS

# BOARD INVOLVEMENT – UICC’S MEMBERS

## HOW HEAVILY IS THE BOARD INVOLVED IN FUNDRAISING?





HOW HAVE YOU SUCCESSFULLY ENGAGED  
BOARD MEMBERS AND VOLUNTEERS IN YOUR  
FUNDRAISING PROGRAM? WHAT HAVE BEEN  
THE MAIN CHALLENGES?

# LEVERAGING VARIOUS VOLUNTEER STRUCTURES

## Board of Trustees

Provides counsel and leadership, often with an expectation of giving;  
*Advancement Committee* supports day-to-day fundraising

## Planning Committee

Provides early vision and support for new strategic efforts; focus on laying campaign groundwork

## Campaign Committee

Supports campaign fundraising efforts; focus on reaching campaign goal and attracting new donors

*...and many others*

# Case Study: Generation Unlimited (UNICEF)

## LEADERSHIP GIVING FROM A BOARD MEMBER

### CCS ENGAGEMENT

- Overall fundraising counsel (2018-2020)
  - Prospect strategy
  - Case development
  - Board engagement



### TAKEAWAYS

- Identifying a 'champion' can help change the culture of a Board
- Asking Board members to support the overall mission can be effective

# Case Study: Texas Children's Hospital

## THE POWER OF A PLANNING COMMITTEE

### CCS ENGAGEMENT

- Feasibility study (2018)
- Campaign management (since 2019)
- Goal: \$100M
- Raised-to-date: \$47M



### TAKEAWAYS

- Establishing advisory councils can keep top prospects engaged and inspired
- Consistently seek the input of volunteers and celebrate the impact of their counsel

# CAMPAIGN COMMITTEES OPEN DOORS

## CCS ENGAGEMENT

- Campaign management for the Business School (2014-2019)
- Goal: €30M
- Raised: €34M



## TAKEAWAYS

- Developing sub-committees aligned with campaign priorities, each staffed with a volunteer leader
- Establishing clear guidelines (and even fundraising goals!) for committee members

# RULES OF (BOARD AND VOLUNTEER) ENGAGEMENT

## Do's

1. Position the Board/volunteers as the heroes in your story
2. Express a clear and exciting vision that they can rally behind
3. Clearly define roles and responsibilities
4. Communicate regularly and individually
5. Provide the tools for them to effectively carry out their roles

## Don'ts

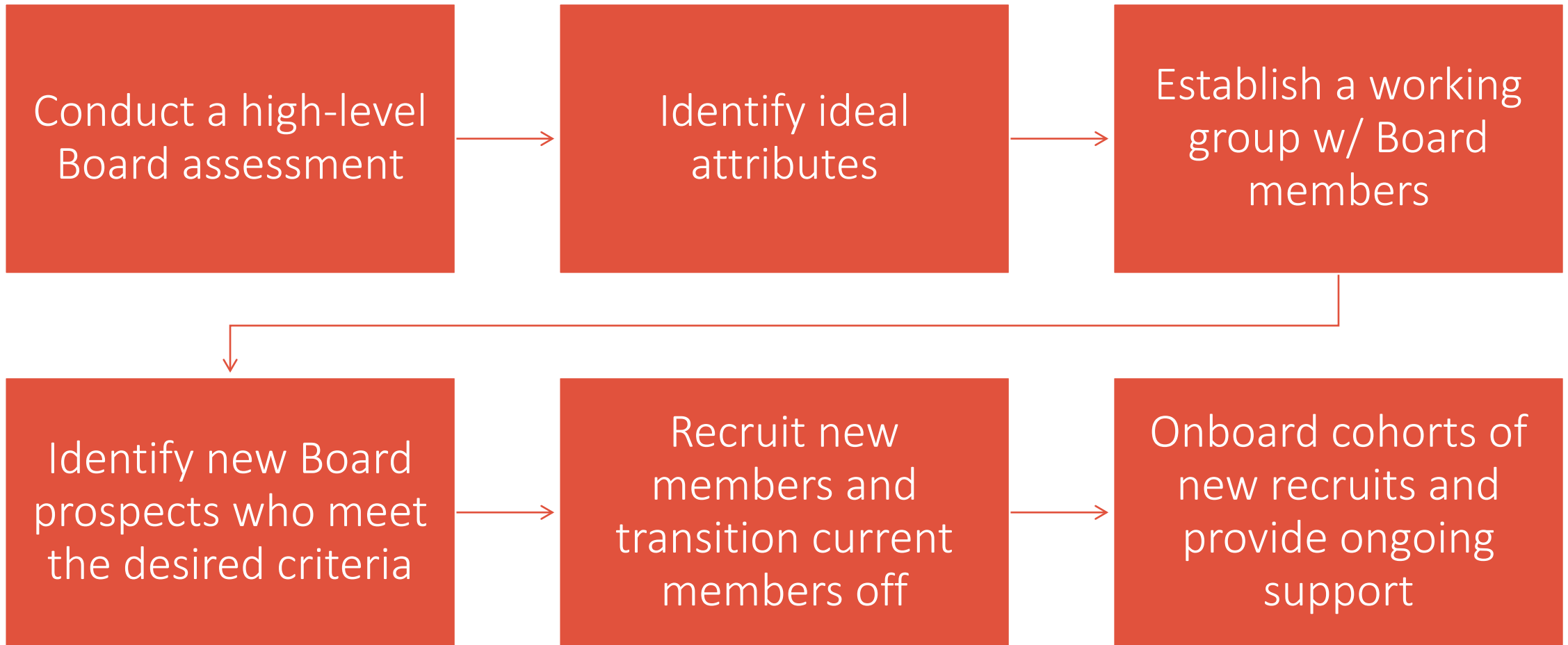
1. Set fundraising goals too high and asks too low
2. Assume the Board and volunteers will work without being asked and supported
3. Keep ineffective members on the Board/committee
4. Rely just on the Board for fundraising support
5. Take them for granted!!!

# ROLE OF A BOARD/COMMITTEE IN FUNDRAISING:

*It's not just about asking for money*

	(1) IDENTIFY	(2) CULTIVATE	(3) ASK	(4) STEWARD
Board/ Volunteers	<ul style="list-style-type: none"><li>▪ Review names</li><li>▪ Suggest new names</li></ul>	<ul style="list-style-type: none"><li>▪ Place call / take meeting / host event</li></ul>	<ul style="list-style-type: none"><li>▪ Reinforce case for support</li><li>▪ Accompany the solicitor</li></ul>	<ul style="list-style-type: none"><li>▪ Send 'thank you'</li><li>▪ Stay engaged</li></ul>
Staff and outside expertise	<ul style="list-style-type: none"><li>▪ Research</li><li>▪ Develop targeted lists to circulate</li><li>▪ Track and manage information</li></ul>	<ul style="list-style-type: none"><li>▪ Develop strategy</li><li>▪ Provide research and speaking points</li><li>▪ Execute follow up</li></ul>	<ul style="list-style-type: none"><li>▪ Coordinate the ask</li><li>▪ Prepare proposal / materials</li><li>▪ Execute follow up</li></ul>	<ul style="list-style-type: none"><li>▪ Send mailings and updates</li><li>▪ Keep all informed</li><li>▪ Consider next ask</li></ul>

# BUILDING THE BEST BOARD





# PRACTICAL TOOLS FOR BOARD & VOLUNTEER MANAGEMENT

## Board assessment (initial survey)

# FIERCE —FOR— LSUA

**Menu of Involvement Opportunities**  
Prepared for the LSUA Foundation Board

**Name:** \_\_\_\_\_

**I am willing to:** *(Please choose all that apply)*

- Host a reception for the campaign (goal: 30-35 attendees)
- Attend campus tours with potential donors
- Make introductions to potential donors
- Lead solicitation conversations with potential donors
- Participate in solicitation meetings with another volunteer
- Other: \_\_\_\_\_

**A potential donor(s) for the campaign, who I can help you with, is/are:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**We would like to engage the following individuals as potential donors. Do you know any of them or know who is a good connection?**

DONOR NAME      I know him personally  
                            A good connection: \_\_\_\_\_

DONOR NAME      I know him personally  
                            A good connection: \_\_\_\_\_

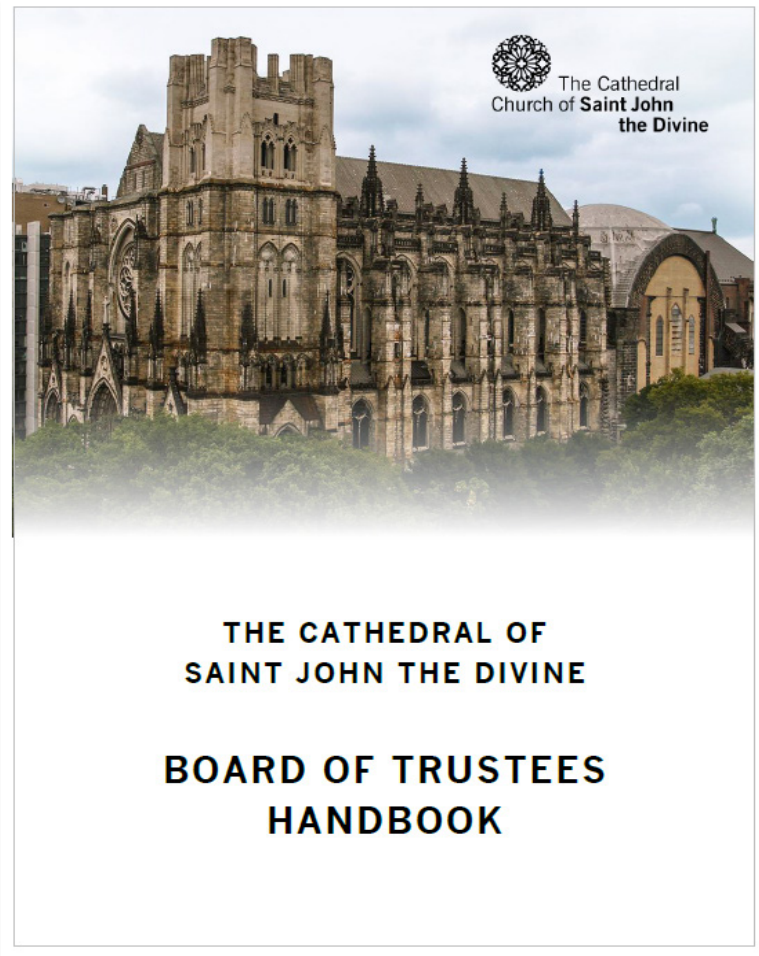
DONOR NAME      I know him personally  
                            A good connection: \_\_\_\_\_

## Identify ideal attributes (sampling of criteria for matrix)

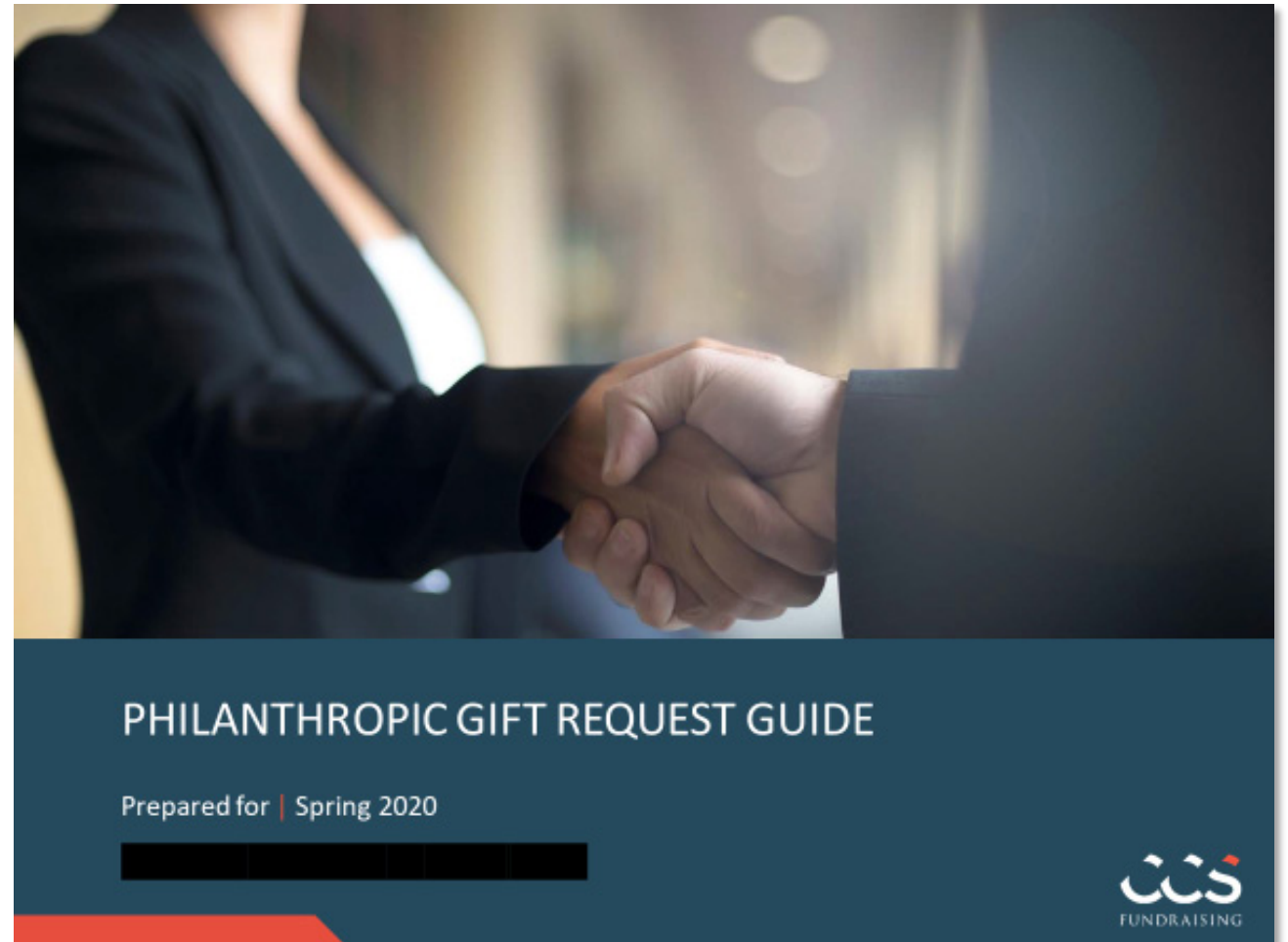
Gender		Ethnicity					Generation				
Female	Male	African-American	Latino	Asian	Caucasian	Other	Generation Z	Millennials	Generation X	Baby Boomers	Silent
	1		1							1	

# PRACTICAL TOOLS FOR BOARD & VOLUNTEER MANAGEMENT

## Onboarding tool (Board handbook)



## Ongoing support/trainings



DISCUSSION AND NEXT STEPS

OF THE STRATEGIES AND APPROACHES WE  
SPOKE ABOUT TODAY, WHAT RESONATES  
THE MOST? WHAT ROADBLOCKS MIGHT  
YOU ENCOUNTER?

# NEXT STEPS



Conduct a back-of-the-envelope assessment of your current Board/volunteers



Build a list of prospective new Board members who would add value



Keep working on your case for support, which will be a critical tool for recruiting