

Let's Break It Down: Engaging Your Board in Philanthropy

Presented by Cindi Phallen
For NAYDO on January 18, 2022

JUST ONE THING

What Will You Do Differently?

Today

But first...

**Update or
Stagnate**

**Relate or
Separate**

**Evaluate
and
Celebrate!**

**Your One
thing**

Share this info with your Board

But First...

Sorry...



But First...Check Your Mindset



- Is it just too hard?
- Do you apologize?
- Do you undersell?
- Are you selling them short?

Imagine if we focused on what's possible!!

Impact Triangle

Mindset

Tools

People

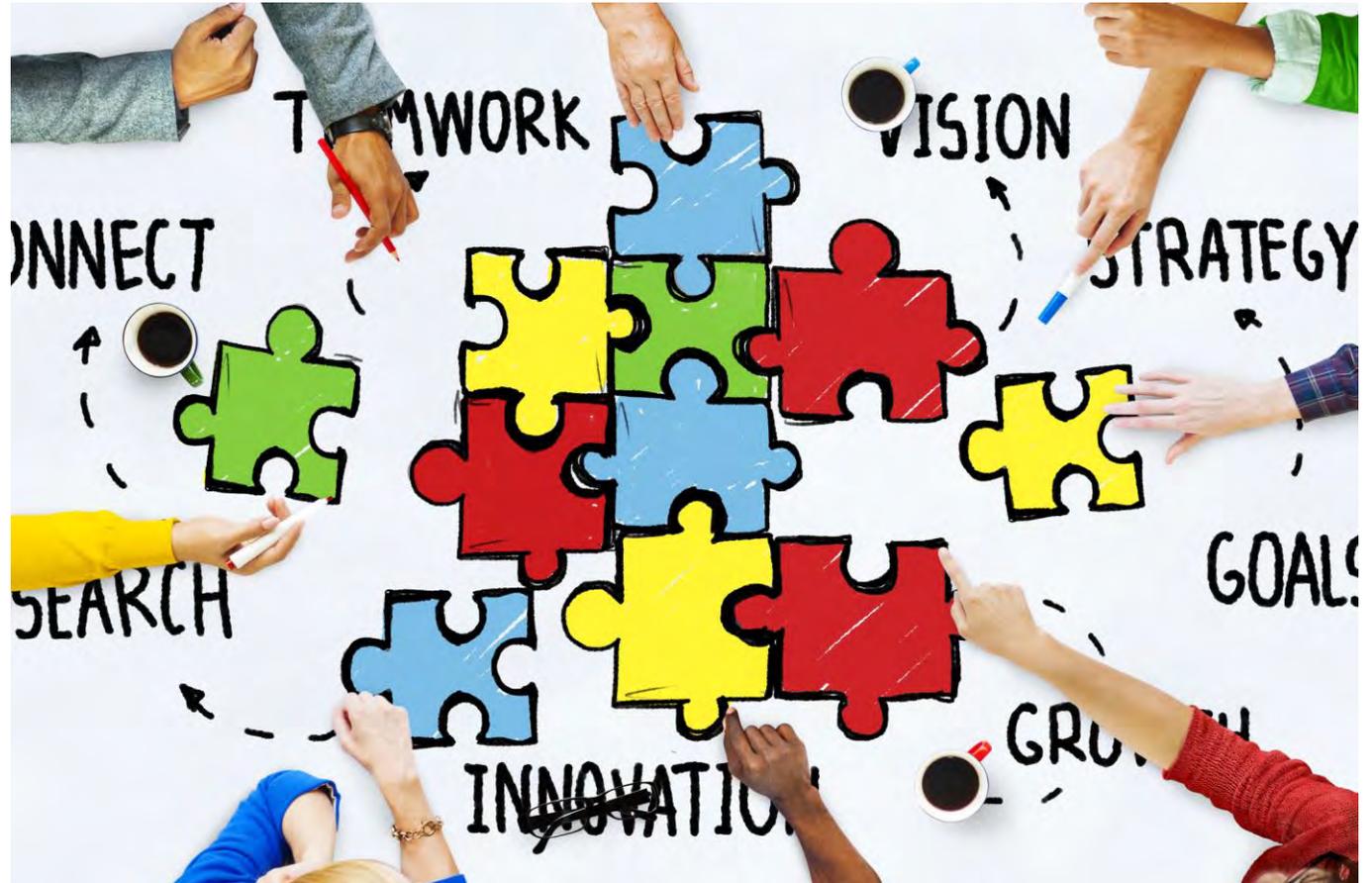


But First...

Recruit Well

Focus on selecting enough of the right people focused on the right things – match them with a committed veteran

(and be clear about expectations)



Understand Why Board Members Hesitate

Common Obstacles:

- No expectations
- Don't understand "why"
- No experience
- Not polite to ask for \$\$
- Fear of rejection

EDUCATE EDUCATE EDUCATE

Philanthropy is a Team Sport



Poll Question 1

Overall, how engaged are your board members in your philanthropic activities?

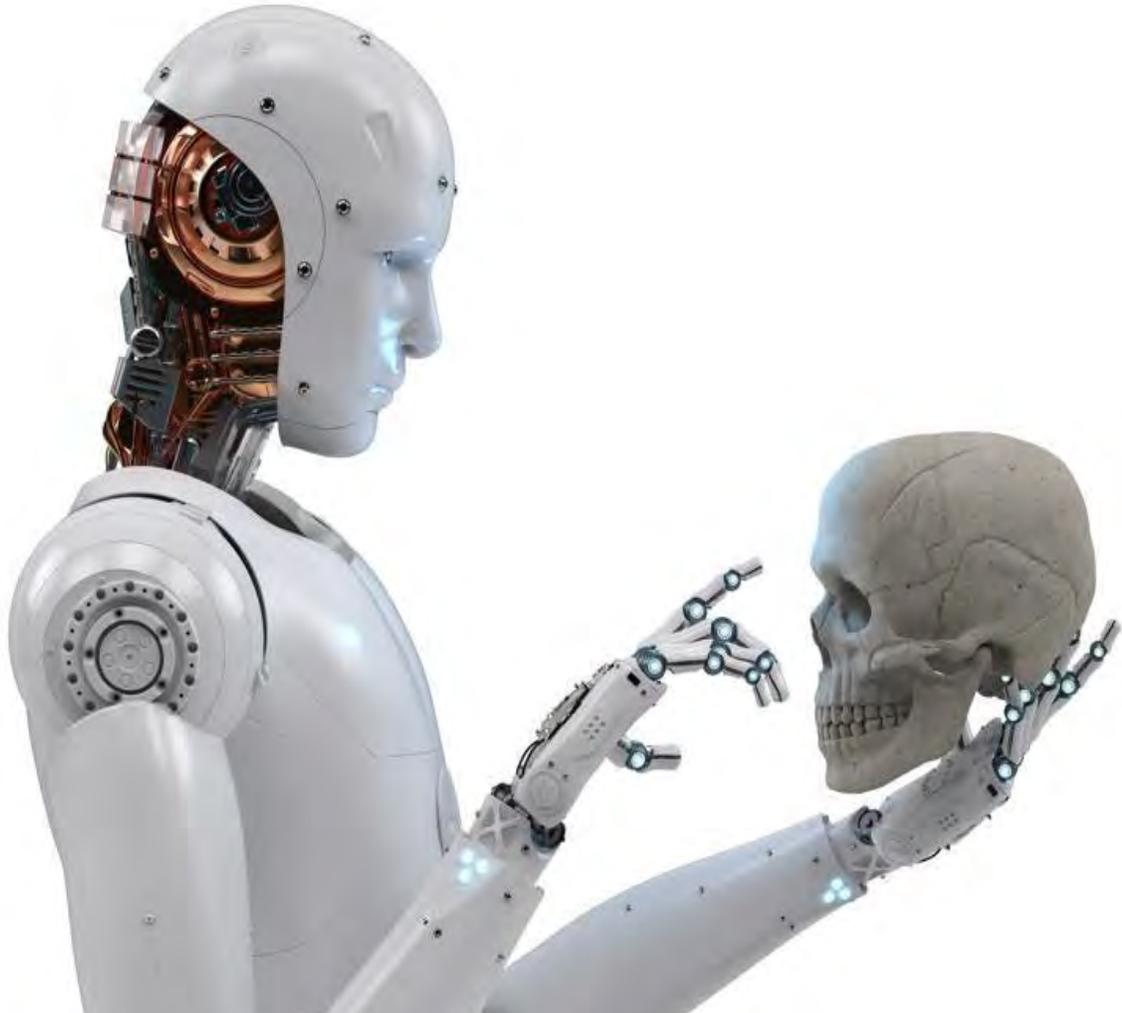
- All in! We're hitting it out of the park!
- Many are involved in some way
- Less than half are doing something
- I don't want to talk about it

Update or Stagnate

1. Technology
2. Language
3. DEI



Technology – Board Needs to Allocate Resources



- Social
- Site
- Auction platforms
- Meetings
- Cyber security

Language

Stop Asking For Money!!

“Invite them to Invest”

Instead of Development or Fundraising,

“Philanthropy”

Resource: “Beyond Fundraising” Haas Jr. Foundation



Poll Question 2

Have you addressed equity and inclusion in philanthropy?

- Yes! Feeling good about all the DEI work we've done at our Y!
- We've done some general DEI work but not specifically focused on philanthropy
- We've not really made progress here yet

Comments in chat

Diversity, Equity and Inclusion

Reflect and Act:

Are staff trained on DEI topics?

How diverse is your board?

Are you making assumptions about donor profiles?

Do donors come from areas you serve?

Where are there disparities due to privilege?

Are donors at the table?

CCF: CommunityCentricFundraising.org



Relate or Separate



Why do Strong Donors Relationships Matter?

When you really know your donors...

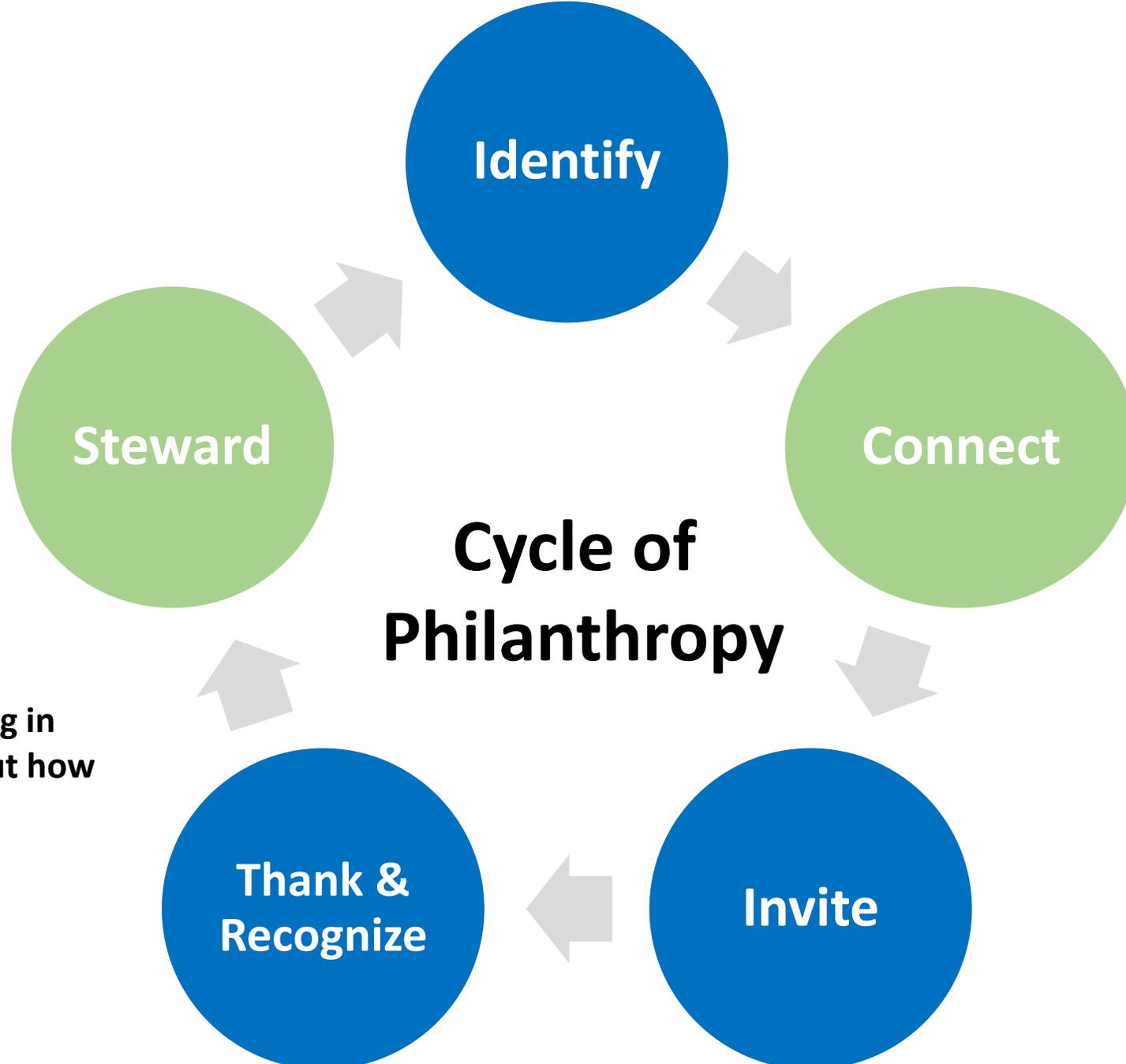
- Board members feel more connected
- Informs planning
- The more donors know, the happier they are
- Retention increases
- Monthly and Multi-year pledges grow
- More volunteers
- Easier community engagement

Put others in chat...





How Can Your Board Help With Donor Relations?



**Cycle of
Philanthropy**

Every board member can plug in
somewhere; be specific about how

Poll Question3

How comfortable are you holding board members accountable for philanthropy expectations?

- Very! We communicate very well
- Pretty comfortable, although we can't expect too much – they're volunteers
- I avoid it when I can and fill in the gaps myself
- Not comfortable at all

Evaluate and Celebrate!!!

1. Share Data – pick top 5 from your annual plan to track
2. Be crystal clear about what you need and why (cause driven)
3. ***Equip them for success***
4. Monitor progress
5. Party like crazy!!!
6. Adjust where needed

Speak in terms of mission, not money





Who?
Weekly emails?
Quarterly dashboard reports?
Annual review?



Keep your focus on the people goal, less about money!



What's Your One Thing?
(post in chat)



**Cindi Phallen, CEO
Create Possibility**

Questions?



cindi@possibility-cp.com



www.linkedin.com_cindiphallen
www.possibility-cp.com/blog



1-858-735-4762



@CindiPhallen