



**Every Board Member is a Fundraiser**

2013 NDOA Winter Conference Presentation  
Supplemental Resources

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# EXAMPLE BOARD SKILLS MATRIX

## Self Assessment - Board Member Skills, Expertise, Knowledge, Experience

Politics/Advocacy				
Experience on Board				
Volunteer				
Community Needs Assessment/Planning				
Process Management				
Marketing				
Project Management				
Governance				
Public Relations/Communications				
Program Development & Evaluation				
Fundraising/Development				
Human Resources				
Computers - Web Creation/Maintenance				
Computers - Database/Content Management				
Technology				
Business				
Community Connections				
Education				
Leadership				
Finance & Investment				
Personnel Administration				
Legal				
Social Service Delivery				
Facilities				
Foundation/Grantor				
(NAMES)				



**WestSide Baby**  
*basics for children in need*

## **Join the WestSide Baby Board of Directors and help provide basics to local children in need.**

### **Vision and Values**

The long-term vision of WestSide Baby is to ensure that all babies and young children in our community have their most basic needs met: enough diapers, adequate clothing and shoes, developmentally appropriate toys and books, and safe equipment for their care.

### **What does WestSide Baby do?**

WestSide Baby purchases, collects, and distributes new and used essential items such as diapers, clothing, books, toys, and baby equipment to families in need free of charge. Items are distributed through social service agencies.

### **What is the Board's role at WestSide Baby?**

The WestSide Baby Board is a governing board, providing policy and leadership to the organization. It makes sure the best interests of the community are represented and funds are stewarded in support of the mission. It keeps the organization accountable to the community within the context of its mission and vision. Board members support fundraising efforts through personally significant gifts of their own, connecting to other giving opportunities and supporting events and outreach.

### **What will be expected of me as a Board Member?**

During the three-year term, each Board Member is expected to;

- Attend and participate in monthly board meetings (11 per year)
- Serve on a board sub-committee &/or hold an officer position
- Attend the one-day planning session/retreat each year
- Attend the Annual Benefit Tea in February each year
- Make a personally significant annual financial contribution to the organization

### **What is the process for joining the board?**

Governing our organization is one of the most critical roles someone can play at WestSide Baby. That's why we intend to recruit a pool of qualified board candidates for every seat on the board. The WestSide Baby Board Governance Committee leads the board recruitment process and members are chosen by current Board Members. The process is two phase. First you can fill out a Board and Committee Interest Form. The Board Governance Committee will review your inquiry, assess it against our current needs and contact you. After an initial contact you will either receive a full application to complete or we will suggest different timing based on WestSide Baby's needs. The second phase includes current Board analysis of your full application, a meeting with the ED and/or a Board member to include a tour of WestSide Baby. If the fit of skills and timing are appropriate, the Board will extend an Invitation to Serve. If you are chosen to be on the board, you will be notified by the Board Chair.



# EXAMPLE BOARD INTEREST FORM



**WestSide Baby**  
*basics for children in need*

## Board of Directors & Committee Interest Form:

Date: \_\_\_\_\_

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

Email Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Business Experience: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Non-Profit Experience: \_\_\_\_\_

*(Include WestSide Baby history if applicable.)*

Non-Profit Experience: \_\_\_\_\_

*(Include WestSide Baby history if applicable.)*

\_\_\_\_\_

\_\_\_\_\_

Board Experience: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Skills:** *(Check all the apply)*

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> Medical                  | <input type="checkbox"/> Computers - Database            | <input type="checkbox"/> Process Management         |
| <input type="checkbox"/> Facilities               | <input type="checkbox"/> Computers - Web/Maintenance     | <input type="checkbox"/> Community Needs Assessment |
| <input type="checkbox"/> Social Service Delivery  | <input type="checkbox"/> Human Resources                 | <input type="checkbox"/> Multicultural Expert       |
| <input type="checkbox"/> Legal                    | <input type="checkbox"/> Fundraising/Development         | <input type="checkbox"/> Youth Networking           |
| <input type="checkbox"/> Personnel Administration | <input type="checkbox"/> Sales                           | <input type="checkbox"/> Senior Networking          |
| <input type="checkbox"/> Financial & Investment   | <input type="checkbox"/> Program & Development           | <input type="checkbox"/> Other: _____               |
| <input type="checkbox"/> Real Estate Development  | <input type="checkbox"/> Public Relations/Communications | _____   |
| <input type="checkbox"/> Education                | <input type="checkbox"/> Governance                      | _____   |
| <input type="checkbox"/> Business                 | <input type="checkbox"/> Project Management              | _____   |
| <input type="checkbox"/> Technology               | <input type="checkbox"/> Marketing                       | _____   |

**Availability To Start:** *If invited to join the Board of Directors or a Board Committee, when would you be available to start?*

\_\_\_\_\_

Email form to [board@westsidebaby.org](mailto:board@westsidebaby.org) or mail to WestSide Baby C/O Board of Directors, 10032 15th Avenue SW, Seattle, WA 98146

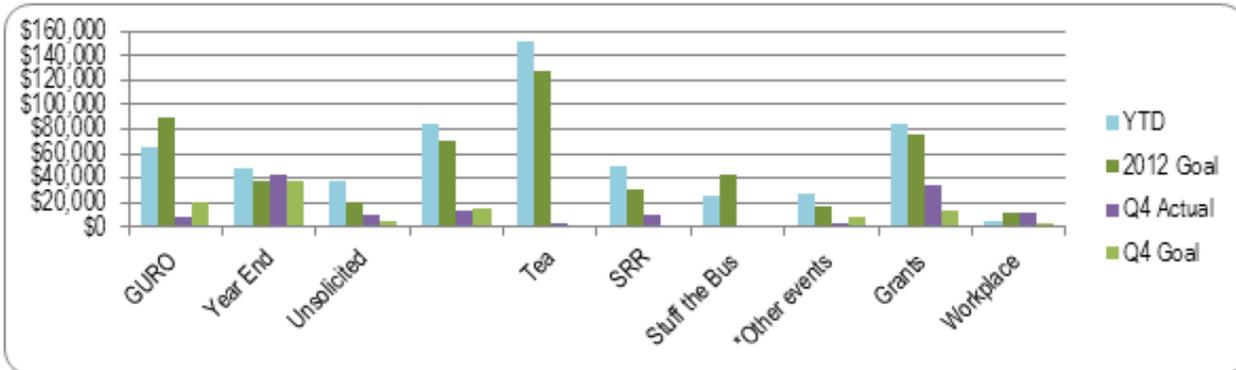
[www.westsidebaby.org](http://www.westsidebaby.org)



# WestSide Baby Monthly Development Dashboard

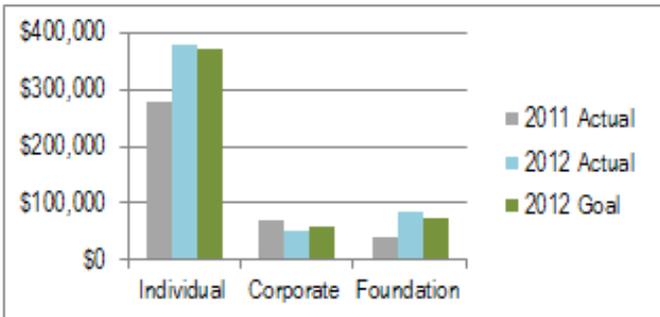
Summary Reports - Updated 1.14.13

## #1 YTD Strategies - Actual vs. Goal



\*Includes cash donations from individuals, corporations, and foundations.

## #2 Revenue Streams - Actual vs. Goal



	Individual	Corporate	Foundation	Totals
2011 Actual	\$279,665	\$69,392	\$40,274	\$389,331
2012 Goal	\$369,000	\$59,000	\$75,000	\$503,000
2012 Actual	\$380,774	\$52,471	\$84,150	\$517,395

## #3 Metrics for Success

	2011 Actual	2012 YTD	2012 Goal
Giving Circle - new members	18	15	18
Giving Circle - renewed members	13	9	13
Donor Acquisition - # new donors	323	470	323
Donor Retention - % returning donors	46%	49%	46%

# WestSide Baby Monthly Development Dashboard

Progress Reports - Updated 1.14.13

## #5 MG Cultivation Meetings (\$1,000+)

(data not available)

## # 6 Stewardship Calls

	July-Nov	2012 Goal
Total # of gifts by individuals	319	na
Total stewardship calls	71 +	360
# of Stewardship Calls - ED*	na	120
# of Stewardship Calls - DOD*	na	120
# of Stewardship Calls - Board	71	120

(data not available)

(data not available)

(data not available)

## # 7 Grant Funding Requested

	2011 # Actual	2012 # Goal	YTD	2011 \$ Actual	2012 \$ Goal	Amount Requested	Amount Awarded
Submitted*	4	20	22	\$44,500	\$100,000	\$124,500	\$49,000
Grants Awarded/Received	2	15	15	\$25,000	\$75,000	\$73,500	\$49,000
Grants Pending	na	na	9	na	na	\$16,000	na
Grants Declined	2	na	2	\$19,500	na	\$35,000	\$0

\*Total awarded/pending/declined may be larger than # submitted due to grants awarded which were not submitted



# WestSide Baby Monthly Development Dashboard

Strategic Reports - Updated 1.14.13

## #8 Donor Gift Pyramid\*

Giving levels	FY10		FY11		FY12		
	Revenue Total	# of donors	Revenue Total	# of donors	Revenue To Date	# of donors	% change from 2011
10000+	\$46,563	4	\$48,985	2	\$75,721	5	150.00%
5,000 - 9999	\$22,598	3	\$34,742	5	\$41,319	6	20.00%
1000--4999	\$54,418	29	\$71,999	42	\$112,972	65	54.76%
500--999	\$34,242	59	\$48,054	79	\$52,826	90	13.92%
100--499	\$51,084	266	\$60,139	300	\$81,799	390	30.00%
1--99	\$13,123	333	\$11,079	289	\$14,329	359	24.22%
<b>Totals:</b>	<b>\$222,028</b>	<b>694</b>	<b>\$274,998</b>	<b>717</b>	<b>\$378,965</b>	<b>915</b>	<b>27.62%</b>

\*includes sale of tickets, alcohol, babycakes and raffle tickets (doesn't include donations from anonymous/general donations)



## **Major Gift Strategy 2012 Board Engagement/Portfolio Management Overview**

### **Board Engagement/Portfolio Management Plan:**

Each board member will be assigned (2-3) donors to cultivate on an on-going basis. Each board meeting will allow for 30 minutes allocated to training board members how to cultivate their donors. Each board meeting will feature a different topic/step of managing a donor portfolio. After the board meeting, board members will be tasked with implementing what they learned with their assigned donors. At the following board meeting, progress will be reported on how each board member did with their own donors and then a new topic will be introduced.

### **Calendar of Topics:**

- August – Prospect Research
- September – Donors Cultivation/Engagement
- October – Personal Visits
- November – Making the Ask
- December – Stewardship
- January – Moving Forward

### **General Training Format:**

- Review of previous topic – 5 minutes
- New Topic Introduction - 10 minutes
- Group Discussion – 10 minutes
- Application/practice – 5 minutes

## **Board Engagement/Portfolio Management Overview**

August 2012 - Prospect Research

### **Review of Previous Training Topic – Thank You Calls (5 minutes):**

- How did thank you calls go? Questions, concerns, what worked well?

### **New Topic – Prospect Research (10 minutes):**

- What is a donor portfolio
- How were the included donors chosen
- What is the importance of research/preparation
- Resources for additional research:
  - referenceusa.com- can use to search for business owners, need library card
  - Puget Sound Business Journal – (<http://www.bizjournals.com/seattle/>), shows business listings
  - Homes.com – find property values
  - Zoominfo.com –professional bios
  - Opensecrets.org – history of political gifts
  - Google – can be used to see if they donate to other organizations, search “(name) charitable donations” or similar phrases
  - LinkedIn.com – for professional relationships
  - Facebook.com – for personal interests & relationships, although many are blocked

### **Group Discussion (10 minutes)**

- What types of information would be valuable to know about donors?
- What types of questions/concerns do you have about research?
- Tactics for prospect research to share?
- Ways to familiarize yourself with your prospects before you meet with them?

### **Application (5 minutes)**

- NA

### **Handouts**

- Example Donor Profile

## EXAMPLE DONOR PROFILE SHEET

### Donor Name

Relationship Manager: (you)

Address:

Address:

Email:

Phone:

### Donor Status/Level:

### Giving Circle Info:

### Giving History

Lifetime amount received:

YTD amount received:

Last Transaction Date/Amount:

1<sup>st</sup> Transaction Date/Amount:

1 Year Ago amount received:

2 Years Ago amount received:

3 Years Ago amount received:

Largest Transaction Date/Amount/Campaign/Approach:

# of Years Given (since 2006):

### GURO Prospect Goal:

### Additional Information

Interests:

Family: Spouse/Children

Employment Info:

WSB Relationship:

Notes:

Birthday:

**Board Engagement/Portfolio Management Overview**  
September 2012 – Donor Cultivation/Engagement

**Review of Previous Training Topic – Prospect Research (5 minutes):**

- What was easy? What was difficult? What did you learn from the process? Questions?

**New Topic – Donor Cultivation/Engagement (10 minutes):**

- Why is cultivation and engagement important
- Who does it? How often?
- Importance of tracking activities and what you learn
- How your research informs your cultivation strategies
- Cultivation and engagement ideas
  - Personal thank you call/note
  - Personal letter with an update
  - Asking for the donors opinion
  - Tour of facility
  - Invite them to volunteer to sort clothes
  - Meet with Executive Director and/or Board members to ask questions, hear about what's new at the organization
  - Invite them to an event, sit with them at the event
  - Personal visit
  - Asking why they give

**Group Discussion (10 minutes)**

- Other ideas of how to cultivate our donors?
- How have you been cultivated by other organizations? What do you like and dislike?

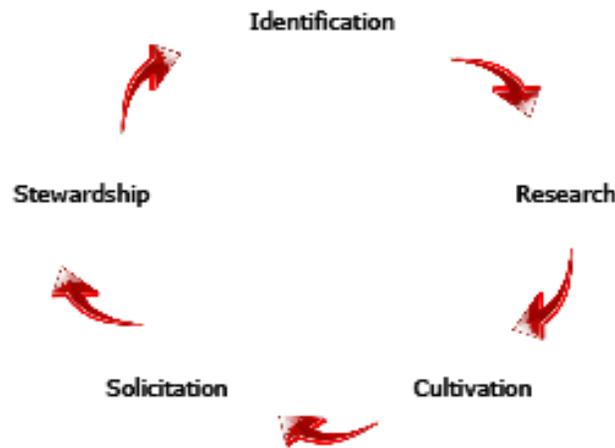
**Application (5 minutes)**

- Make a plan of one activity you will do for each of your donors this month

**Handouts**

- Engagement continuum

## Continuum of Donor Relationship Cycle of Major Gifts



**Identification:** Identifying potential donors who might give to WestSide Baby or current donors who may be able to increase their yearly giving.

**Questions to ask:** Who is passionate about the mission of WestSide Baby?  
Who would be interested in learning more about WestSide Baby?

**Research:** Learn what other organizations the donor supports, their philanthropic philosophy, their interests, capacity to give / assets, other personal information

**Research tools:** Personal meeting, survey, online research, donor prospect tools

**Cultivation:** Informing the donor about WestSide Baby's mission, providing opportunities for them to be involved, building a relationship with the donor, sharing new information

**Cultivation ideas:** personal meeting, mailings, updates, insider information, asking for their opinion

**Solicitation:** Asking the donor to support and invest in the mission of WestSide Baby

**Solicitations:** Personal asks, direct mail appeals, events

**Stewardship:** Continuing to keep the donor engaged with WestSide Baby, learn more about them to find other ways they can be involved with WestSide Baby

**Stewardship ideas:** Report on how their money was used/the difference it made, personal meeting, mailings, insider information, asking for their opinion

## Board Engagement/Portfolio Management Overview

October 2012 – Personal Visits

### **Review of Previous Training Topic – Donor Cultivation/Engagement (5 minutes):**

- What was your plan after last meeting? Were you able to follow-through? How did it go?

### **New Topic – Personal Visit (15 minutes):**

- Value of personal engagement - why can't we just send an email? ☺
- What constitutes a "personal visit"?
- Ideas for personal visits:
  - Tips for creating an engaging and effective visit
    - Ask open-ended questions
      - Tell me a little bit more about why you support WestSide Baby?
      - How did you get connected to WestSide Baby?
      - What's the most important thing WestSide Baby does?
    - Engage them in the organization's work - invite their feedback on our strategic direction:
      - What is local to them?
      - What is the most important services that we provide?
      - What other services would they expect us to provide?
      - What has more impact, serving more kids or serving kids to a greater level?
    - **Listen!**
      - Silence is ok ☺
    - Ask what the donor is interested in or would like more information about
      - Can I provide you with any further information about WestSide Baby?
      - Would you like to visit the facility to see how it all works?
      - Are there any specific areas that you'd like to learn more about or get involved in?
    - End with a "next step"
      - A date to follow up with any info requested
      - A plan to "check in" (6-12 months?)
      - An invitation to contact you or WSB at any time

### **Application (5 minutes)**

- Make a plan of one activity you will do for each of your donors this month as it relates to planning or conducting a **personal visit**. Write it down!

## **Board Engagement/Portfolio Management Overview**

November 2012 – Personal Solicitation

### **Review of Previous Training Topic – Personal Visits (5 minutes):**

- What was your plan after last meeting? Were you able to follow-through? How did it go?

### **New Topic – Personal Solicitation (10 minutes):**

- This is what you have been working towards
- Giving people an opportunity to be part of such an important organization
- Partner – Involve Nancy and Sarah when meeting and making the ask
- Steps of an effective Personal Solicitation:
  - Plan ahead and be prepared
    - Make your own gift first
    - Be prepared to talk about your reason for support
    - Know your donor. Think about what resonates with this donor and how to customize your approach.
    - Gather materials and pick a meeting place that is conducive to the ask
    - Practice, Practice, Practice. Opening statement and amount you will ask for.
  - Introduction, break the ice
    - Positive and friendly introduction
    - Tailored to the individual
    - Opening conversation, chit chat and quick catch up
    - Share your connection to the organization and why you give
  - Tell the story
    - Reason for the major gifts
    - What Westside Baby is doing and how this effort enables more to be done
    - Listen and answer questions
  - Ask for pledge
    - Be clear and specific
    - Stress importance of the gift
    - After asking – **don't speak**
    - Be comfortable with silence and let the donor speak first
    - Listen to their response and don't jump to conclusions
  - Managing the response
    - Yes – enthusiastically thank them for their gift, give them the pledge card to fill out and identify any next steps.
    - Hesitant/No – gently probe for a reason, such as:
      - Is it timing? (can defer pledge of divide over 3 years)
      - Is it the amount? (ask for a range they would be comfortable with)
  - Thank
    - No matter the response

- Send follow up thank you note regardless of response
- More than one acknowledgement of gift is appropriate
- Follow through
  - Get back to them with an answer
  - Setting up another meeting
  - Record all notes about the meeting

**Application** (10 minutes)

- Break into groups of 2. Spend 5 minutes creating your opening conversation starter, your personal story about why you give, and then how you will make the ask (for sake of time we will not discuss WestSide Baby program). Use the second 5 minutes to have a role play with your partner. It often helps just to hear yourself vocalize the ask.



## EXAMPLE BOARD MONTHLY THANK YOU CALL PROGRAM



### Monthly Board Thank You Calls

#### **Overview:**

For each month's board meeting, board members will receive a list of people who have made monetary donations since the previous board meeting. Each board member is to reach out to their designated list within one week of receiving it to thank donors for their gift. A basic thank you script & email template will be provided. Once thanked, the board member will report back to the DOD with any special notes. If there are no special notes, no further action is needed. These thank you calls are, generally, a one-time contact and are not part of the board member's portfolio.

#### **Purpose:**

These points of contact are the best way to sincerely thank donors in a way that lets them know their gift is truly appreciated. Your contact should be respectful, warm, sincere, informational if needed, and leave the donor with a great feeling about our organization. Additionally, this is a prime opportunity to collect supporting information on the donor.

#### **The List:**

Each month's list will contain a certain population of donors as decided upon by the Development Committee, the DOD, and the ED. This population will be described at the bottom of the list with additional clarifications that might be needed.

#### **Process:**

Please follow these steps to make your thank you contact:

- 1 Open the excel sheet emailed to you to find the group of donors you are responsible for contacting.
- 2 Look over the donor's gift information and familiarize yourself with what you are thanking them for.
- 3 Call the prospect and thank them for their gift.
- 4 If there is no phone number, send the donor an email to thank them for their gift.
- 5 If there is no phone number or email, send the donor a personal note on the postcards provided by Sarah. (Let me know if you need more!)
- 6 If there are any special notes\* to share with the DOD after your call, send to [couch@westsidebaby.org](mailto:couch@westsidebaby.org).
- 7 Don't forget to have fun while you make these calls! These people love WSB and so do you, make them feel welcome and as part of the family!

\*Notes to send to the DOD may include:

Updated contact information, reasons the donor chose to support WSB, any concerns they may have, any stories about WSB they share, or anything that may help the DOD strengthen the relationship between the donor and WSB.