

Ask like a...

NONPROFIT HERO

Five Easy Steps to Successful Board Fundraising!

Presented by Valerie M. Jones, CFRE
Nonprofit University
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Speaker



Valerie M. Jones, CFRE, brings her intelligence, determination and independent spirit to the world of fundraising.

She's raised \$175 million+ over her career, addressed conferences from Baltimore to Beijing and coached more than 1,000 volunteer and professional fundraisers to ask comfortably, authentically and successfully.

In 2018, Amazon named her book *Nonprofit Hero* one of its top ten Hot New Releases for nonprofits.

Valerie M. Jones, CFRE, 610-565-1352, val@vmja.com, www.vmja.com

Learning Objectives

Turn your board to more effective fundraisers using these four principles

1. Honor their fears
2. Five-Step framework
3. Strengths-based asking
4. Preparation

Honor their Fears

Who are you?

Write your personal mission statement



<http://msb.franklincovey.com/>

"Be yourself, everyone else is taken." – Oscar Wilde



Boards members rock, but...



- 65% give themselves a “C”, “D” or “F” in fundraising
- More than half hate to do the one thing the one thing upon which their nonprofits depend
- Yet, #1 reason why donors give is because...

Why they hate fundraising



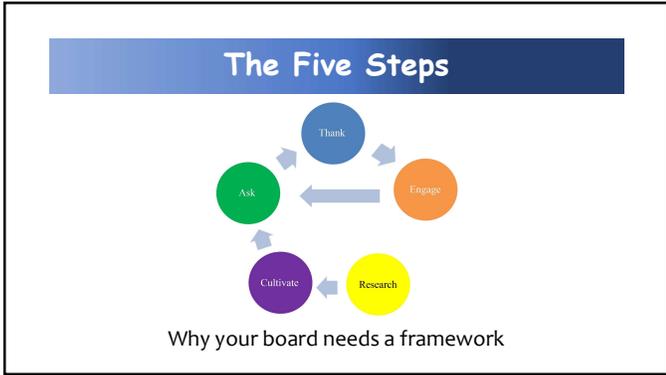
Yeah, but...

1. _____
2. _____
3. _____

"The cave you fear to enter holds the treasure you seek."

~ Joseph Campbell

The Five-Step Framework



Why start with thanking?

Average NPO loses 55% of its donors each year. Why?

- 19% Not acknowledged or thanked for last gift
- 16% Not asked to donate again
- 14% Not told how funds were use
- 5% Dissatisfied with use of last gift

Case Studies*

Saying
Trait
Case Study
Action

*A word about the stories



Step 1 - Thank

Saying: Everyone can thank
Trait: Grateful
Case Study: She'd rather talk to plants
Action: Assign thankers to new donors

"Gratitude is the memory of the heart." - French Proverb



Step 2 - Engage

Saying: How did they change the world?
Trait: Impactful
Case Study: My Anasazi summer
Action: Learn one story per board meeting

"Man is the only animal that laughs and weeps, for he is the only one... struck by the difference between what things are and what they ought to be." - William Hazlitt



Step 3 - Research

Saying: Never a cold call
Trait: Connected
Case Study: A very small town
Action: LinkIn w/board & staff

"Only connect ... and both will be exalted" - E. M. Forster



Step 4-Cultivate

Saying: Nothing sells the Zoo like the Zoo

Trait: Vibrant

Case Study: The Boa in the boardroom

Action: Set experiential as well as \$ goals

"May you live all the days of your life." – Jonathan Swift



Step 4-Cultivate

What's your favorite cultivation activity?	List 3 donors you could invite and why	Date(s)
A. Activity 1	1 2 3	
B. Activity 2	1 2 3	
C. Activity 3	1 2 3	



Step 5-Ask

Saying: Don't put your toddler on a Harley

Trait: Confident

Case Study: Mrs. Johnson

Action: Ask 3 donors before 1 prospect

"Life shrinks or expands, in proportion to one's courage." – Anais Nin



Step 5-Ask

- Saying:** Be prepared
- Trait:** Resourceful
- Case Study:** Pitching a show
- Action:** Have 3 ideas for each prospect

*"I am prepared to meet my Maker.
Whether my Maker is prepared for the great ordeal of meeting me is another matter."
- Sir Winston Churchill, on the eve of his 75th birthday*



Step 5-Ask

- Saying:** Listen your way to gifts
- Trait:** Transformative
- Case Study:** Lady summering in Maine
- Action:** Wait three beats before speaking

"We need silence to touch souls." - Mother Teresa

Strengths-Based Asking



Board Strengths



12 X more effective
- Gallup

Doing what we enjoy motivates workers more than anything else, including money.
- Primed to Perform

"I always wanted to be somebody, but I see now I should have been more specific." - Lily Tomlin



Your Asking Personality

Preference, not destiny
16 profiles based on MBTI

Extraverted (E) or Introverted (I): _____
Sensing (S) or iNtuiting (N): _____
Thinking (T) or Feeling (F): _____
Judging (J) or Perceiving (P): _____



<https://psychcentral.com/quizzes/personality/start.php>

"The world's a stage, but the play is badly cast." - Oscar Wilde



Who, How, Why Ask?

ISTJ • Quiet donors • Ask on-site • Logical needs	ISFJ • Current donors • Ask with a partner • Improvements	INFJ • Likely donors • Active listening • Motivating needs	INTJ • Ask institutions • Have a plan • Strategic projects
ISTP • Ask pragmatists • Show don't tell • Concrete projects	ISFP • Current donors • Ask on-site • Aesthetic projects	INFP • Intuit who to ask • Express passion • Inspiring projects	INTP • Ask institutions • Help write grants • Innovative ideas
ESTP • High-achievers • Big picture • Exciting projects	ESFP • Ask new people • Ask socially • New opportunities	ENFP • Reserved donors • Share your vision • Outreach needs	ENTP • Ask intellectuals • Reveal new ideas • Take on challenges
ESTJ • Leading citizens • Solid finances • Concrete projects	ESFJ • Ask peer donors • seek win-win gifts • Delicate situations	ENFJ • Ask big donors • seek win-win gifts • Transformative	ENTJ • Decision makers • Challenge grants • Lead gifts as chat



Strengths & Weaknesses

ISTJ ↑ Careful, honest ↓ May prep, not ask	ISFJ ↑ Attentive, focused ↓ May not ask at all	INFJ ↑ Guide wise giving ↓ May not ask at all	INTJ ↑ Grasp shared goals ↓ May go own way
ISTP ↑ Vivid experiences ↓ Facts over feelings	ISFP ↑ Attuned to donors ↓ Overly sensitive	INFP ↑ Giver over gift ↓ May give up easily	INTP ↑ Adept w/ideas ↓ Ideas over feelings
ESTP ↑ Ultimate persuader ↓ May over-promise	ESFP ↑ Warm, enthusiastic ↓ Overly sensitive	ENFP ↑ Empathic catalyst ↓ Needs to be liked	ENTP ↑ Loves challenges ↓ Ideas over feelings
ESTJ ↑ Inspires trust ↓ Can get stuck	ESFJ ↑ Prepared, sensitive ↓ Conflict adverse	ENFJ ↑ Lucid & inspiring ↓ Conflict adverse	ENTJ ↑ Compelling speaker ↓ Can intimidate



Preferred Steps

ISTJ ✦ Engage ✦ Thank	ISFJ ✦ Thank ✦ Engage	INFJ ✦ Ask ✦ Cultivate	INTJ ✦ Research ✦ Ask
ISTP ✦ Research ✦ Engage	ISFP ✦ Engage ✦ Thank	INFP ✦ Ask ✦ Cultivate	INTP ✦ Research ✦ Cultivate
ESTP ✦ Cultivate ✦ Ask	ESFP ✦ Cultivate ✦ Thank	ENFP ✦ Cultivate ✦ Ask	ENTP ✦ Research ✦ Ask
ESTJ ✦ Cultivate ✦ Engage	ESFJ ✦ Engage ✦ Ask	ENFJ ✦ Cultivate ✦ Engage	ENTJ ✦ Ask ✦ Research



Put it Together

Type	ENFJ
Who	Ask big donors
How	Seek win-win gifts
What	Transformative projects
Strength	Articulate, inspiring
Weakness	Need to be liked, can be too conflict adverse
Steps	Cultivate and Ask
Help	_____
	What could you do?

Map your Board

Preparation

Let them set their own goals

MY NAME:					
MY GDAL IS:					
Is it:	___ Specific?	___ Measurable?	___ Achievable?	___ Relevant?	___ Time-oriented?
Break it down	1. I will				By when?
	2. Then I'll				By when?
	3. Then I'll				By when?
Share with a supportive person	A tell B				
	B tell A				
Report Back Dates	1st:				
	2nd:				

"Do or do not. There is no try." – Yoda



Pre-Ask Board Checklist

1. Clear on why you want what you want?
2. Done the preceding steps?
3. Know who, how, where, what to ask?
4. Set personal goal
5. Done self scan and gotten happy?

"If you fail to prepare, you are preparing to fail." – Benjamin Franklin



Get happy ?!?!

Shawn Achor, *The Happiness Advantage*

- Gratitude for something in last 24 hrs.
- Conscious act of kindness
- Meditate-watch breath 2 minutes

<http://www.ted.com>, or www.GoodThinkInc.com

A word about fundraising superstitions

"We choose our joys and sorrows long before we experience them." – Kahil Gibran



What we covered

1. Honor their fears
2. Five-Step framework
3. Strengths-based asking
4. Preparation

What your board can do right now, for free

1. Their personal mission statement
2. ID fears, flip is ⇒ superpower
3. Become a new-donor thanker
4. Learn 1 story @ board meeting
5. Link In with board and staff
6. Engage through experience
7. Match cultivation activities to donors, friends & prospects
8. Ask 3 donors before 1 prospect
9. Have 3 ideas for each donor
10. Wait 3 beats before speaking
11. Play to *their* asking strengths
12. Set *their* personal goals
13. Consult pre-ask checklist
14. Get happy!

Q & A

Resources from Val



Book: Available from Amazon in Kindle or hard copy
Or ask your local library to buy for the whole community!

Fundraising Help: Vlogs, blogs, job listings & more

- www.vmja.com
- <http://vmja.com/boardtraining/>
- <https://www.linkedin.com/in/valeriemjonescfre/>
- <https://www.facebook.com/ValJonesFundraising/>
- <https://twitter.com/ValJFundraising>



Top Ten Reasons People Give

1. *Someone I know asked me to give, and I wanted to help them.*
2. I felt emotionally moved by someone's story.
3. I want to feel I can help when there's a need (disasters).
4. I want to feel I'm changing someone's life.
5. I feel a sense of closeness to a community or group.
6. I need a tax deduction.
7. I want to memorialize someone (i.e., beloved parent).
8. I was raised to give to charity - it's a tradition in my family.
9. I want to be "hip." Supporting this charity is in style.
10. It makes me feel connected and builds my social network.



Why start with donors?

In addition to being more likely to say yes ...

- 36% of donors volunteer
- 32% participate in events
- 29% will help you raise \$
- 27% sign petitions
- 20% contact legislators
- 18% share stories



Take a Look at Yourself

	FINANCIALS	OPERATIONS
BOARD ORIENTATION & EDUCATION Does the board conduct a formal orientation for new board members and require all board members to sign a written agreement regarding their roles, responsibilities, and expectations?		No
CEO OVERSIGHT Has the board conducted a formal, written assessment of the chief executive within the past year?		No
ETHICS & TRANSPARENCY Have the board and senior staff reviewed the conflict-of-interest policy and completed and signed disclosure statements in the past year?		No
BOARD COMPOSITION Does the board ensure an inclusive board member recruitment process that results in diversity of thought and leadership?		No
BOARD PERFORMANCE Has the board conducted a formal, written self-assessment of its performance within the past		No

Check for free on: www.guidestar.org
