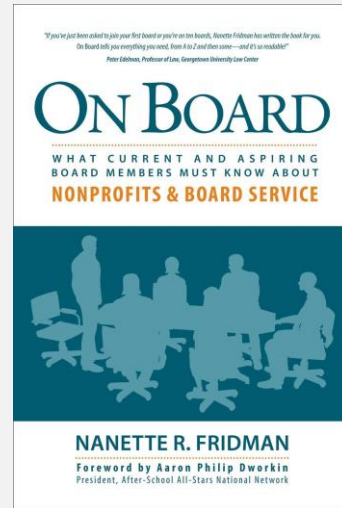
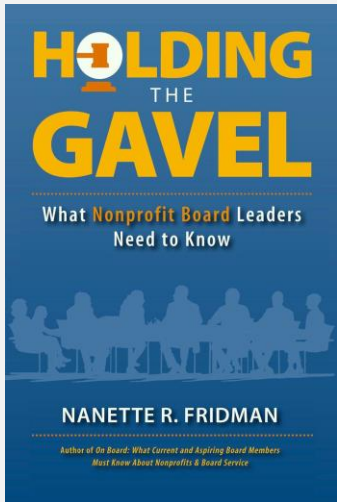


**BEYOND SOLICITING:
HOW TO ENGAGE YOUR BOARD IN
FINANCIAL RESOURCE DEVELOPMENT**

April 3, 2023



INTRODUCTION OF NANETTE FRIDMAN

- President of Fridman Strategies, Inc.
- 25+ years of experience with nonprofits as a professional, lay leader, and consultant & coach
- National speaker, trainer and facilitator
- Author of two books, On Board and Holding the Gavel
- BA, Tufts University
- MPP, Georgetown University Public Policy Institute
- JD, Georgetown University Law Center
- Harry S. Truman Scholar



IN THE CHAT

- Name
- Synagogue
- Role
- What is one word that comes to mind when I say fundraising?



GOALS

- Discuss development as a team effort
- Explore the key components of mindset, skill and will necessary for board fundraising success
- Suggest how to ask the key question to your board members to engage them

PARTICIPANTS IN YOUR SYNAGOGUE'S FUNDRAISING

“Fundraising isn’t just one person’s job. Everyone—staff, executive director, constituents, board and volunteers—shares responsibility for fund development.”

*Beyond Fundraising: What Does it Mean to
Build a Culture of Philanthropy By Cynthia M.
Gibson*

- Who participates in your synagogues' fundraising currently?
- Who else might you involve?

FUNDRAISING IS A TEAM SPORT

Consider this example:

- Name suggested by a board member
- Development professional or person with experience researches the prospect
- Provides information to the ED/Rabbi/Board Chair/Development Director
- Board member makes an introduction
- Lead Solicitor sets up a meeting with the prospect and Board Chair/Member
- ED/Rabbi/Board Chair sells vision and leadership
- Board Chair or Board member makes the ask
- Development Director or Committee Chair records notes and thank you sent
- Stewardship plan devised



BOARD OR DEVELOPMENT COMMITTEE CHAIR ACTIONS TO TAKE WITH RESPECT TO DEVELOPMENT

- Meet with each board member to discuss their financial contribution – ask for a stretch gift if possible
- Talk to each board member about people they are willing to serve as a key contact for and/or names to add to the prospect list
- Vote on the annual development plan
- Offer development training
- Include a development report at every meeting
- Have an active development component at most meetings

BOARD OR DEVELOPMENT COMMITTEE CHAIR ROLE AS COACH

- Be enthusiastic
- Assess the team
- Put the individuals in the right positions
- Teach the team the plays
- Practice with the team
- Send them off on the field
- Debrief
- Keep everyone motivated



THE BOARD AND FUNDRAISING



**ROLES AND
RESPONSIBILITIES**



EXPECTATIONS

LEAD BY EXAMPLE

- Board Giving Policy
 - Give and Get
 - Give or Get
 - Personally Meaningful Gift
 - Make the organization one of your top two philanthropic priorities
- Timing – Early
- Consider endowment or legacy giving



KEY COMPONENTS TO ENGAGE YOUR BOARD

- Mindset
- Skills
- Will



MINDSET

“He who causes others to do good is greater than the doer.”

- Babylonian Talmud, Bava Batra

- Money is not a necessary evil.
- There is no shame in asking!
- You are not asking for yourself. You are asking for your synagogue!
- Money = Mission
- Giving is an expression of people's values.
- When you invite people to make a gift, you give them an opportunity to live their values, do a mitzvah and make their dreams come true.



MINDSET

- And when the board embraces its role and fundraising:
 - Freedom from budget cutting
 - Allows for excellence
 - Diversity
 - Innovation
 - Sustainability

SKILLS

1. Overview

- Annual Giving and Development Cycle

2. Prospect

- Community Mapping
- Intake - New and Existing Donors – Key Contacts

3. Qualify

- Capacity
- Commitment
- Connection

4. Cultivate

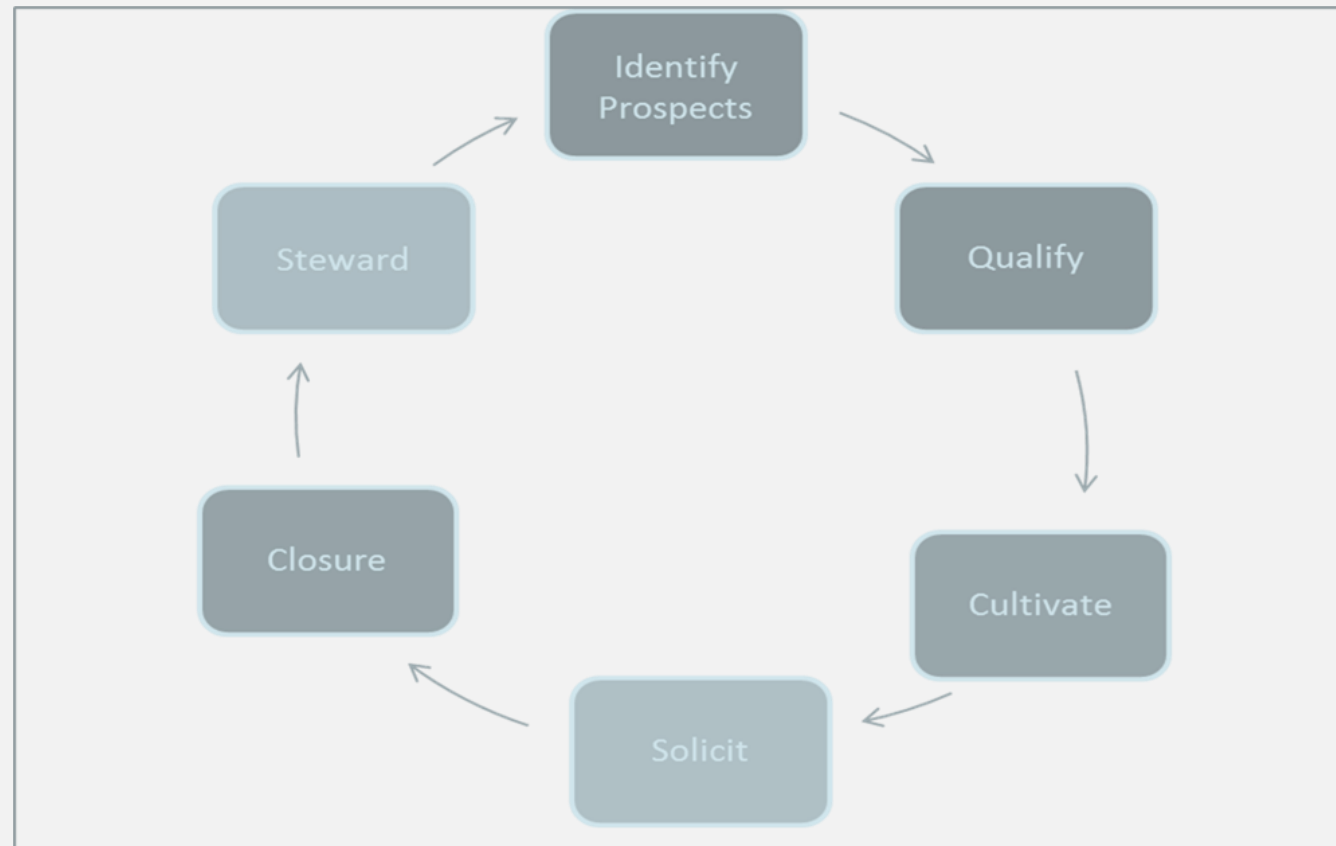
- Coffees
- Ambassadorship
- Storytelling
- Engagement

5. Solicit

- Case for Giving
- Mechanics
- Practice

6. Steward

THE DEVELOPMENT CYCLE





WILL TO ENGAGE YOUR BOARD

- Job description
- Onboarding
- Training
- Creation of Menu
- Engagement Opportunities
- Information/Tools – Case for Giving
- Meeting with ED/DD/Committee Chair
- Assign Names
- Schedule Moves
- Report back/Accountability
- Measure Progress
- Recognition
- Celebrating Success

DISCUSSION

- How would you ***briefly*** assess your board's fundraising?
 - Mindset
 - Skill
 - Will
- What is one thing you have done in the past that has been successful in improving their mindset, skill and/or will?
- What is one thing you might do to help further strengthen their mindset, skill and/or will in the future?

ASKING THE KEY QUESTION

- THE KEY QUESTION IS NOT ***IF*** YOUR BOARD MEMBERS WILL BE INVOLVED IN FUNDRAISING, BUT RATHER ***HOW!***

ALONG THE WAY!

- Recognize
 - Individual contributions
 - Group efforts
- Celebrate small and big wins!
- Reassess how everyone is involved each year



QUESTIONS& ANSWERS

CONTACT INFORMATION

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