



PRIZMAH

Center for Jewish Day Schools

Getting Your Board on Board: The AAA Way to Fundraising Success

9 – 10:15 a.m.

International Salon 8

2019 Prizmah Conference

Atlanta, Georgia

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Agenda



- › Welcome and introductions: participant expectations
- › AAA (Ambassador, Advocate, Asker) program: a strategy for deeper engagement
- › Best practices that enhance AAA effectiveness
- › Review of sample board engagement survey
- › How this might work for you – discussion
- › Putting this into practice – aligning development and fundraising tasks with AAA
- › Summary and closing remarks

The School Fundraising Team



- › Head of School
 - › Provides academic vision
 - › Provides leadership internally and in the community
- › Development Director with staff
 - › Provides systems for supporting board and head in donor development and fundraising
 - › Cultivates and maintains relationships, working with Board and Head of School
- › Board of Directors
 - › Link between school and community
 - › Identify, cultivate, solicit and steward donors with staff and Head

Board Roles in Fundraising

- › Partner with staff to increase fundraising success
- › Help identify, qualify, cultivate prospects
- › Open doors, introduce people (“warm handoff”)
- › Make own commitment
- › Ask for gifts
- › Maintain links with supporters and assist with renewal process (stewardship)
- › And many other possibilities...
- › What other ways do you involve board members??

Engaging Your Board In The Full Development Process

A role in each step for boards

.....and the full team

- › Identification
- › Qualification
- › Development of strategy
- › Cultivation
- › Solicitation
- › Stewardship
- › Renewal
- › What holds board members back from engaging as partners in this process?
- › Discussion





Tapping Into Your Full Potential: Building Your “AAA” Team

What it is

How to build one

Getting Boards Engaged in Donor Development and Fundraising

■ Donor Development (Ambassador and Advocate)

- ☐ Cultivation
- ☐ Stewardship

■ Fundraising (Asker)

- ☐ Asking others
- ☐ Going with staff on solicitations
- ☐ Helping with corporate, foundation or government sources

Defining a AAA Board

- › A “Triple A” board is one where every member is motivated to be an Ambassador, Advocate and/or Asker – tapping into board member motivation and offering assignments drawn from the strategic plan or the development plan that are specific and geared to the board member’s motivation
- › The board feels supported in their roles by Development staff and the Head of School
- › AAA is a management tool, ensuring follow through by staff and volunteer leaders

Roles Board Members Play in Maximizing Development Results



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- › **Ambassadors**
 - › Make friends
 - › Build relationships
- › **Advocates**
 - › Make the case (formal and informal)
 - › Key to solid board recruitment
- › **Askers**
 - › Make the ask
 - › “Front line” fund raisers

Ambassadors

- › A role everyone plays (no excuses!)
- › Critical role in cultivation of prospective donors and stewardship of continuing donor-investors
- › Need to be well trained and coached in the message about your impact
- › Confidence with the “elevator speech” (and the “elevator question”)
- › Catalysts for donor-investor renewal
- › Are all of your board members confident Ambassadors?

Advocates

- › Accepting assignments they have signed up for, they are strategic in their information sharing
- › You may also call on them to advocate for your school on a more formal basis with a local government agency, another organization with which you are partnering or an institutional funder -- or to recruit potential board members
- › You inform them carefully on the case for support, and review your strategic plan and vision with them
- › You help them learn to handle objections and other tough questions
- › Can you think of an Advocacy opportunity for your school?

Askers

- › They enjoy asking
- › They are well informed, well trained
- › You match them with prospective donors (or current donor-investors) for maximum possibility of success
- › You team them with another board asker or staff leader for the solicitation
- › Staff trains them in the asking process and in handling the close – and objections – and they are coached right before an ask
- › They benefit from the work of the Ambassadors and Advocates

Becoming a AAA Board Member

- › Some board members will (and may now) do it all
- › Most will excel at one or two roles
- › Their motivation is increased because they can choose the tasks that draw on their skills and are in their “confidence zone”
- › The AAA program engages each board member in a role that contributes to your school’s advancement and helps them feel respected and engaged
- › As confidence increases, you will find board members moving among the roles – perhaps even to Asker!
- › The impact of their work is enhanced when the full team is engaged: staff and Head of School

Tools to Build Board AAA Confidence

- › Training and coaching
- › Support, feedback and encouragement
- › A “tool kit” – including (but not limited to) fact sheet, elevator speech/question, impact evidence, stories of your students and teachers, objections they may confront and suggested responses, financial statements, staff and board lists with annotation, organizational funding priorities, etc.



Setting Up a AAA Board Program

Review of survey

Would this work with your board?

Steps in Setting Up a AAA Program

- › Determine what activities/tasks you would like board members to do in the coming year (using your development or strategic plan)
- › Cluster the tasks in Ambassador, Advocate and Asker groups
- › Create a survey, using the model provided
- › Introduce the idea at a board meeting and invite discussion
- › At the next board meeting – or in an email follow up – have them fill out the survey
- › Compile the results and create a spread sheet showing what each board member has agreed to do (look for “gaps” that may inform recruitment)
- › Use the spread sheet as a platform for ongoing communication with the board members and for annual evaluation



Best Practices

Enhancing Your School's Success



***"I welcome you to the 283rd meeting of the
Society for Innovation in Fund Raising."***

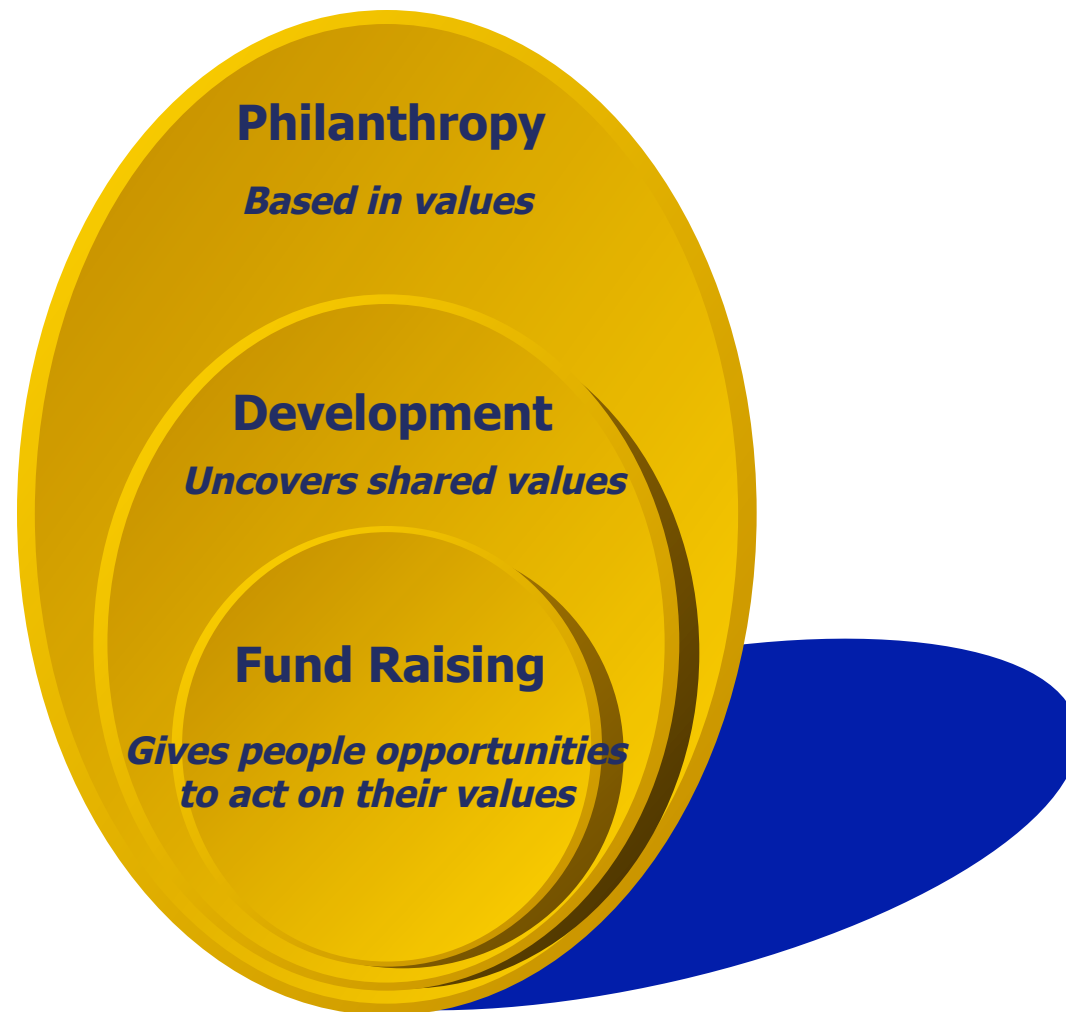
Key Ideas to Guide You

- › People give because you meet needs, not because you have needs: key to investment positioning
- › A gift to your school is really a gift through your school into the community
- › Fundraising is not about money, it is about relationships (if we build them, the money comes; neglect them, and the money goes away)
- › All philanthropy (giving, asking, joining, serving) is based in (shared) values



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What Donors Look For in Their Philanthropic Investments: **TRUE**



- › Trust
 - › Will my investment be well spent, well stewarded?
 - › What is your “track record?”
- › Relevance
 - › How relevant is your work to my interests and needs?
 - › What impact are you having on the things I care about?
- › Urgency
 - › How urgent are the needs you are meeting?
 - › Why your school? Why now?
- › Experience – what “UX” or experience will I have?

Measuring AAA Effectiveness

- › Number of contacts Ambassadors make – and report! Create an easy way for them to relay information to your prospect files
- › Success of Advocacy: whatever the task assigned, was it accomplished and did it have the desired results?
- › Success of the Asker is the easiest to measure
- › Honor all three A's: SOS

Further Questions?



Closing Comments

- › Volunteers are the only human beings on the face of the earth who reflect this nation's compassion, unselfish caring, patience, and just plain loving one another. ~*Erma Bombeck*
- › Volunteers don't get paid, not because they're worthless, but because they're priceless.
~*Sherry Anderson*



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Thank you

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