

Maximizing Your Role as a Board Member: The AAA Way

LATINO BOARD LEADERSHIP ACADEMY

MAY 31, 2023 LBLA XXIV SESSION 8

KAY SPRINKEL GRACE, PRESENTER

Agenda

- ▶ Welcome, introductions and participant expectations
- ▶ Becoming AAA board members: key to advancement of your board's priorities
- ▶ Board AAA opportunities: Ambassador, Advocate, Asker
- ▶ The full AAA program – a review
- ▶ Reviewing the program: breakout rooms
- ▶ AAA and fundraising: how they work together
- ▶ Summary and conclusion

Discussion: Finding the Best Role as a Board Member

- ▶ Why your involvement is critical
- ▶ Tapping into your own motivation
- ▶ Getting engaged in fund and donor development – the full AAA
- ▶ AAA as a tool for board community engagement
- ▶ AAA: one step at a time

Tapping Into Your Full Potential: Being An Effective Member of a “AAA” Board Team

WHAT AAA IS

WHY IT WORKS

Defining a AAA Board

- ▶ AAA boards ask every board member to be an Ambassador – and offer opportunities to also be Advocates and/or Askers
- ▶ You are offered roles that are specific and geared to your interests and motivation that are drawn from a strategic or development plan
- ▶ AAA crosses demographics, experience and interests, allowing you to work in your “confidence zone”
- ▶ AAA is a powerful management tool



Roles Board Members Play in Creating Effective Fundraising Programs

- ▶ Ambassadors
 - ▶ Making friends
 - ▶ Building relationships
- ▶ Advocates
 - ▶ Making the case (formal and informal)
 - ▶ Key to solid board recruitment
- ▶ Askers
 - ▶ Making the ask
 - ▶ “Front line” fund raisers

In Your AAA Roles Rely on These Proven Principles

- ▶ People give because you meet needs, not because you have needs
- ▶ A gift *to* your organization is a gift *through* your organization into the community
- ▶ All philanthropy is based in (shared) values and is increasingly about issues, not institutions (it is not about you...)
- ▶ Fundraising is not about money, it is about relationships based on shared values
 - ▶ These principles and the following diagram copyright Kay Sprinkel Grace



Philanthropy

Based in values

Development

Uncovers shared values

Fund Raising

*Gives people opportunities
to act on their values*

What Role(s) Will You Choose to Advance Your Board's Fundraising?

AMBASSADOR – EVERYONE

ADVOCATE AND/OR ASKER TOO?

1. Ambassadors

- ▶ A role everyone has to play (no excuses!)
- ▶ Starring roles in cultivation of prospective donors and stewardship of continuing donor-investors
- ▶ Need to be well oriented and coached in the messages about your priorities
- ▶ Masters of the “elevator speech” (and the “elevator question”)
- ▶ Catalysts for donor-investor renewal
- ▶ Can you be a confident Ambassador? If not, what do you need?

2. Advocates

- ▶ At work or in the carpool – you are strategic in your information sharing
- ▶ You may also be asked to advocate for your organization on a more formal basis with government, another organization with which you are partnering or an institutional funder
- ▶ Are informed not only of the case for support, but also knowledgeable about your strategic plan and mission
- ▶ Are well coached on desired results of the advocacy and handling objections
- ▶ Do you feel you might be an effective Advocate?

3. Askers

- ▶ Enjoy asking
- ▶ Well informed, well trained
- ▶ “Matched” with prospective or current donors for maximum possibility of success
- ▶ Team with another board asker or staff leader
- ▶ Staff organizes the ask so the Asker’s focus can be on the single purpose of getting (or renewing) the gift
- ▶ Benefit from the work of the Ambassadors and Advocates
- ▶ How many of you think you are or could be a confident Asker?



BOARD MEMBER OPPORTUNITY CHECKLIST

- ▶ In your breakout groups, please review the Opportunity Checklist you were sent and discuss which role(s) you might select to be involved as an Ambassador, Advocate and/or Asker.
- ▶ You may select all that apply to you. In making your selection(s), assume that the organization on whose board you serve will provide training, materials and support to help you fulfill your role(s).
- ▶ Discuss with each other and we will review briefly as a group afterwards.

▶

▶ **How many options did you choose?**

▶ As an Ambassador, I will:

▶ Identify and cultivate those in my circle of friends/colleagues who would be interested in supporting our programs.

▶ Host a private cultivation or donor recognition gathering (at my home/at a public venue/at the organization).

▶ Take (#) of people to lunch each quarter.

▶ Invite my best prospects to be my guests at appropriate functions, special tours, lectures, etc.

▶ Help to steward relationships with our prospects and donors through writing notes, participating in Thankathons, hosting donor events, etc.

▶ Other:

- ▶ **How many options did you choose?**
- ▶ As an Advocate, I will:
 - ▶ Represent the organization at public functions (as an attendee/as a speaker)
 - ▶ Become part of a speaker's bureau if asked
 - ▶ Make phone calls to appropriate city or other officials when asked.
 - ▶ Work with staff to create and engage in specific strategies to present the case to my best prospects or those identified by staff. (Arrange information sessions with your contacts who are individual, corporate, or foundation prospects.)
 - ▶ Other: _____

▶ **How many options did you choose?**

▶ As an Asker, I will:

▶ (Lead/Participate in) requests to potential and renewing donors for investment in the organization

▶ Generate and sign letters asking for appointments or gifts.

▶ Make follow up phone calls to solicitation letters and/or visits.

▶ Seek sponsorships for special events and/or promote table purchase by my friends and colleagues.

▶ Other:

▶ Please provide your comments or other ideas for getting involved:

Your AAA Role(s)

- ▶ Some of you will do it all
- ▶ Most of you will excel at one or two
- ▶ Motivation is increased when you are working in roles that draw on your skills and are in your confidence zone
- ▶ The AAA program can engage each of you in a role that contributes to the organization's advancement and helps you feel both valued and engaged
- ▶ As motivation increases, you will find yourself moving among the roles – perhaps even to Asker!

Tools to Build AAA Confidence

- ▶ Continuing reconnection with mission, vision and values and revalidation of your board's priorities
- ▶ Staff and board leadership support, feedback and encouragement
- ▶ A volunteer "tool kit" – including (but not limited to) fact sheet, elevator speech/question, stories from your organization, objections/responses you may confront, financial statements, staff and board lists with annotation, organizational funding priorities, etc.

Measuring AAA Effectiveness

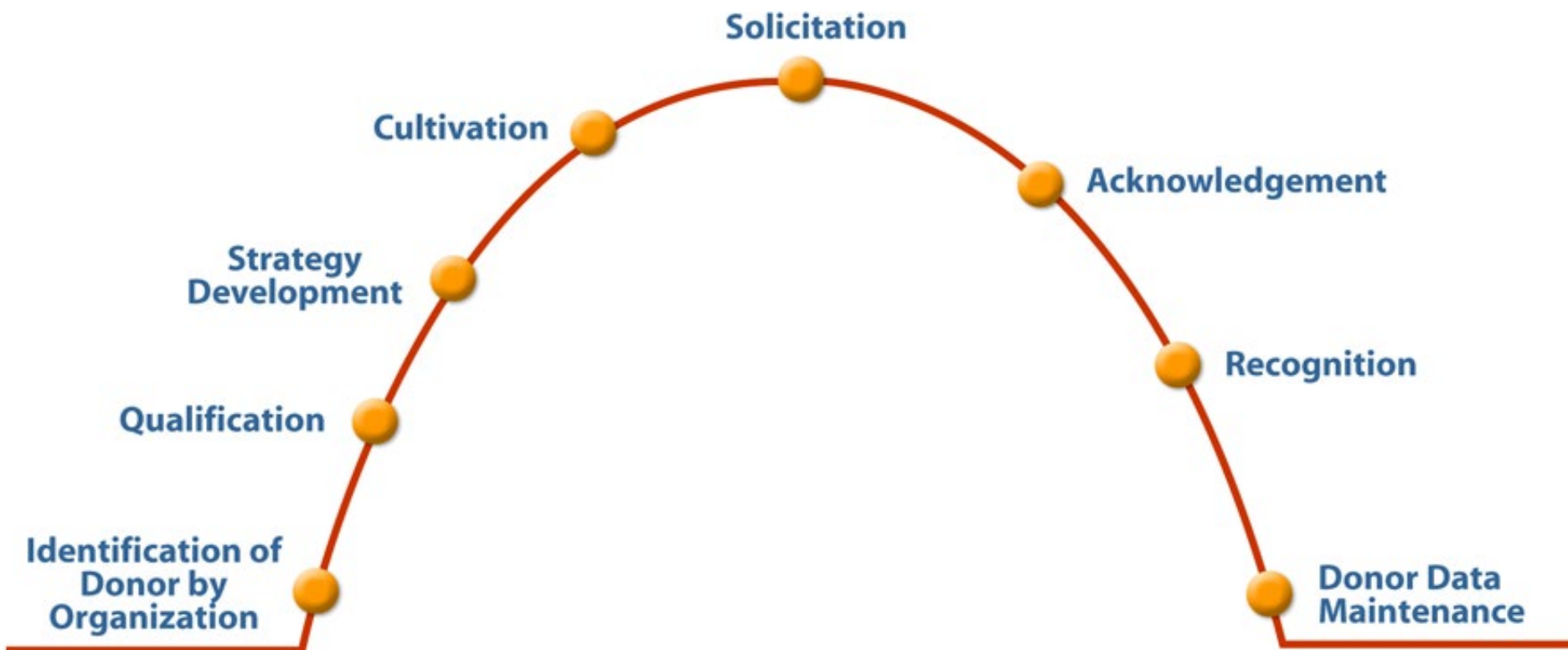
- ▶ Number of contacts Ambassadors make – and report! Create an easy way to relay information to your prospect files (sample in the book).
- ▶ Success of Advocacy: whatever the task assigned, was it accomplished? Did it have the desired results?
- ▶ Success of the Asker is the easiest to measure
- ▶ All three need to be honored: SOS

AAA Roles in Relationship Building and Fundraising

- ▶ THROUGH THE LENS OF AAA
- ▶ CULTIVATION
- ▶ SOLICITATION
- ▶ STEWARDSHIP

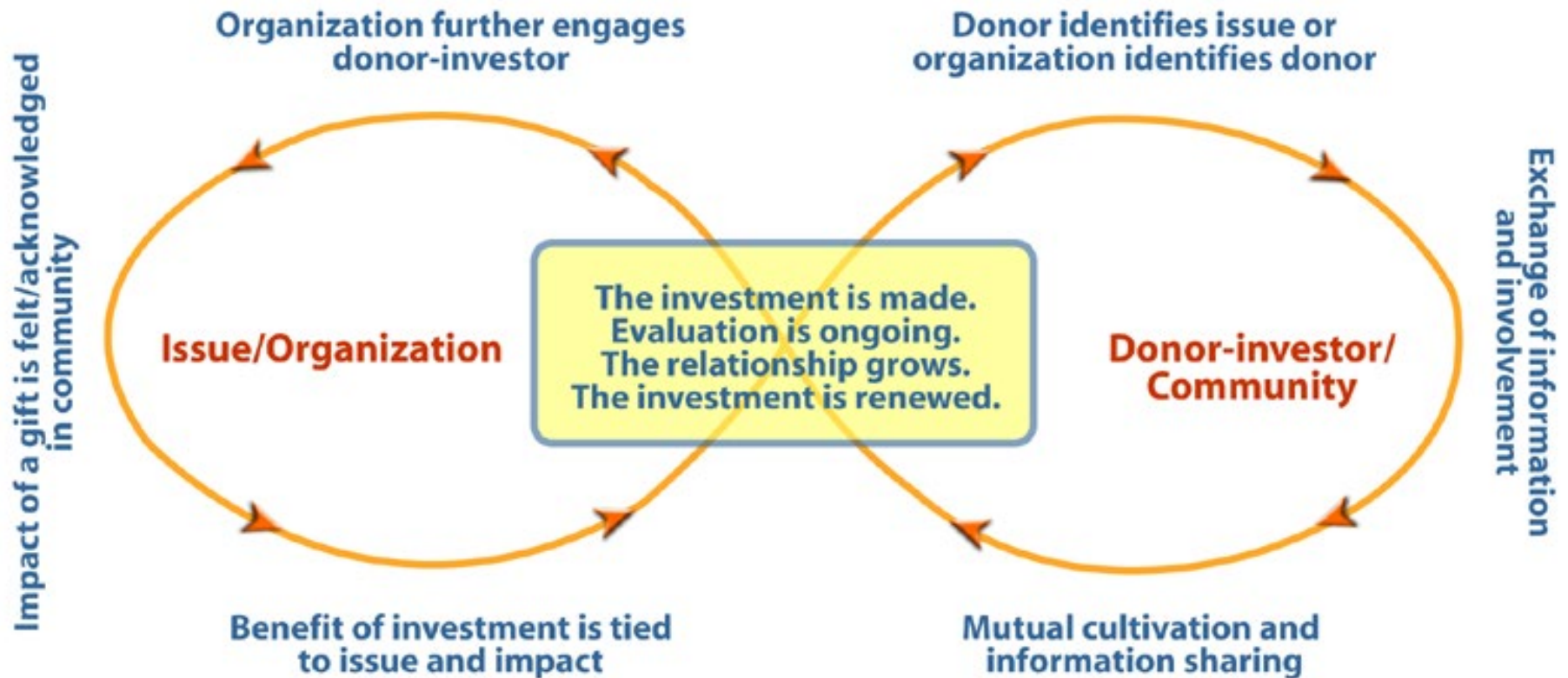
Transactional Bell Curve: How We Have Asked for Money

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High Impact Philanthropy
Kay Sprinkel Grace, Alan Wendroff

Transformational Infinity Loop: How We Build Relationships



High Impact Philanthropy
Kay Sprinkel Grace, Alan Wendroff

What Donors Look For: TRUE

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Trust

- Can I trust what you will do with my gift?

Relevance

- How relevant is your cause to me and my community?

Urgency

- How urgent is the need you are meeting?

Experience

- What will my donor experience be?

3 MOST IMPORTANT STEPS TO GROW YOUR DONOR BASE

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CULTIVATION

SOLICITATION

STEWARDSHIP

Cultivation: How we build relationships with potential donors

- ▶ Ambassadors and Advocates are critical in the leadership and execution of effective cultivation
- ▶ Cultivation is deliberate, systematic relationship-building and you are important in the process
- ▶ Ask for a tool kit, systematic cultivation strategies and cultivation calendar
- ▶ Use resources and intuition to move people from cultivation to solicitation to stewardship
- ▶ Most important skill of good Ambassadors in cultivating donors: listening (2 ears:1 mouth)

Solicitation

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- ▶ If you are an Asker, asking is easier because everyone has helped to build the relationship (Ambassadors)
- ▶ Some things to remember as an Asker:
 - ▶ It is not about you: it is about the donor
 - ▶ Teams of two are most effective (an Ambassador or Advocate may be happy to come along – or a staff member serving the program)
 - ▶ Rehearse, using an asking process that will frame your time and message
 - ▶ Learn how to anticipate and handle objections
 - ▶ Close appropriately based on the outcome of the ask (yes, no, maybe)

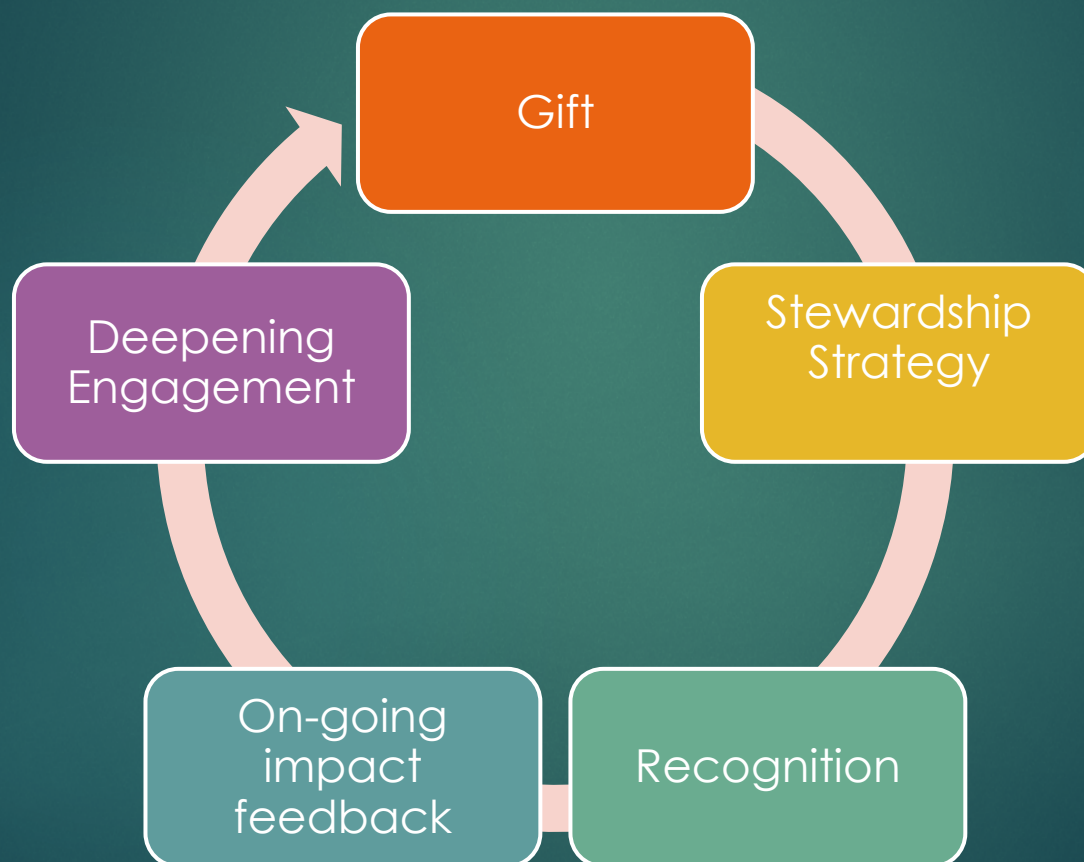


Stewardship

The ongoing relationship with a donor after the gift has been made -- the key to lasting Relationships

- ▶ All three "A's" play a role
- ▶ All staff play a role because fundraising supports program development and implementation: involve those who are directing or providing your programs
- ▶ Stewardship consists of letters, emails, Thankathons, appropriate recognition, ongoing information about impact through stories, etc.
- ▶ More than recognition: it is a true relationship

Stewardship Cycle: Keeping Donors Connected



Levels of Stewardship

3. Special treatment and opportunities appropriate to level of gift

2. Appropriate and consistent recognition, communication and opportunities for involvement

1. Accuracy in donor records, timely response, noting donor's interest(s)

What AAA Organizations Report

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Non-board volunteers are more engaged and major gifts committees (e.g.) are using the model



Staff members are getting involved as Ambassadors and Advocates – and many are making great Askers on team calls



AAA has been integrated into job descriptions and recruitment matrices



Confidence about their roles in relationship building and fundraising has increased among board volunteers

Closing Thought

We are in a time of opportunity for nonprofits. While problems persist, we must remember that philanthropy is about abundance, not scarcity.

The amount of money available for community investment is still great, and the needs in our society have been amplified – from social justice in all its forms, to education, to the arts, to domestic violence and beyond.

All segments of our nonprofit community must take to heart that this continues to be a time to reboot, reinvent, reimagine, rethink and rebuild our communities.

There is no “going back to normal.”

There is only a pathway to a future that is more just, more equitable, more diverse, more abundant and more powerful.





“Things that are unraveling cannot be patched: we need to build the loom on which the next pattern can be woven.”

- (Attributed to Sister Mary Clare, an Irish nun who served in the Crimea with Florence Nightingale).

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