FUNDRAISING COMMUNICATIONS TOOLKIT for Board Members

INTRODUCTION

The purpose of a fundraising communications toolkit for board members is to provide them with the "tools" that they need to effectively raise funds for your organization. As board members are often in a face-to-face situation where they are speaking with potential donors on behalf of the organization, this recommended toolkit focuses on providing key information about the organization to board members, often in a script format or a concise document with easily-digestible bullet points. Information of this kind needs to be provided in spoken language, not written language, so that it is easy for board members to use the information in conversation.

Although the development of the toolkit will likely be a staff-driven project, the toolkit will be much more effective if it is developed in collaboration with the board members on the development committee. The development committee can make recommendations for the table of contents, review the content that the development staff prepares, and advocate the use of the toolkit to other board members.

This toolkit should be designed to be an easy-to-use reference tool. A clear and detailed table of contents or index is essential. There should be clear headers within each section, and plenty of white space on each page. Board members may sit down and read the toolkit all at one time, but they may just as likely refer to it only when looking for a particular piece of information. Therefore, some information may be included more than once in the toolkit (for example, a "key selling point" may also show up as a talking point about the need that the organization serves).

Finally, you may want to design and develop your toolkit so that it can be easily customized for particular board members. For example, you may have one board member who is interested in raising funds for a particular program. It would be helpful to have a fact sheet about that program in that particular board member's toolkit, but it would not be necessary to have the program fact sheet in every person's toolkit. You can decide which pieces from the "core" kit to include, and then have optional sections that can be added for particular board members as needed.

TALKING POINTS ABOUT THE ORGANIZATION
(e.g., The Case for Support Written for Conversation)
This section should include talking points about the organization, which will come directly from the case for support. A written case for support is often composed in language that does not feel natural when spoken and can often be quite lengthy. This toolkit should provide board members with a script that they can use to speak concisely and clearly with someone about your organization. Even though the essence of the talking points will come from the case support, it should not be the case for support verbatim.

Possible sections within this area include are listed below:
1. The "elevator" speech: How to describe your organization in 2 minutes.
2. Why should someone give to your organization? What is the need that you are addressing?
3. What does your organization do? Provide overview of programs and services.
4. Who does your organization work with? Who are its customers and clients?

KEY SELLING POINTS OF THE ORGANIZATION

This section will include impressive facts about your organization that catch people's attention. Some aspects of the key selling points may have already been included in the talking points section above.

This section could consist of particular authority your organization has ("We provide the seal of approval for 'X.'"); impressive information about who or how many clients you serve ("We serve over 1,000,000 people annually."); any impressive awards your organization has received ("We received the 'X' award from the state."); impressive statistics about how your organization is run ("We only have five paid staff but over 500 volunteers who make all of our services possible."); or the uniqueness/indispensability of the service you provide ("We are the only shelter for battered women in the five-county region," or "We are the only museum solely devoted to children's literature in the country.").

OUTCOMES, EVALUATION, AND EFFECTIVENESS

Funders ask nonprofit leaders the following questions: "How do you define success?" and "How do you measure your efforts?" Board members must be able to answer this question confidently. Items that could be included in this section include the following:

1. Outcomes achieved by your organization, preferably in quantifiably measurable terms and as they relate to goals
2. Information about the evaluation efforts undertaken by your organization, and the results
3. Data about demand for your services
4. Data about efficiencies in your organization's operations

STORIES AND TESTIMONIALS

Recounting a personal story from a client is often the best and easiest way for a board member to talk about what your organization does. Also, board members often find testimonials personally motivating, which builds their confidence when fundraising. This section should include three or so of the best or most inspiring stories that are easy for a board member to relate. Be sure that no stories encroach upon a confidentiality agreement that the client may have with your organization.

HOW YOUR ORGANIZATION IS FINANCED

Potential donors want to know how your organization is financed. This section should include information about the sources of income for your organization, such as earned income sources, government grants, foundation or corporate grants, and individual donations. It is also helpful to include some numerical data, such as

- earned income versus donations as a percentage of budget
- grant income
- unrelated business income as a percentage of budget

Please note that this data does not necessarily indicate success or failure at fundraising and should not be framed in that context.

OTHER POSSIBLE SECTIONS TO INCLUDE IN THE TOOLKIT

Your organization may find it useful to include other sections in order to guide your committee members in solicitation and communication. The following list provides further possibilities, always leaving an open door for whatever works best for you:

- Fact sheets on primary programs and services
- Sponsorship opportunities
- Synopsis of a current strategic plan
- List of all funders