

Four Roles of Fundraising Volunteers

While each board member may have a different level of connectivity and comfort with fundraising, there are four main things all board members can do. It is important to review these roles with your board and give them specific ways they can apply it throughout the year. Every board member should not be expected to do all four of these, but they should be participating in at least one. Below each section are notes on how these roles can be applied to an event, whether it is in person or virtual.

Information

Gather information about donors and build the list

In order to grow its donor base, nonprofits need to know the community of donors well. Board members can help the organization learn more about their existing donors and provide input on donor prospects. The more detail about preferences, connections and history the board and other volunteers can provide, the better a nonprofit is able to treat the donors like the individuals that they are.

- Event application: Ask board members for sponsor prospect ideas
- Event application: Ask board members to pay attention and record information they learn while mingling at the event. Someone has an interest in a particular program? Write it down! Someone has never been on location? Write it down and staff can invite them for a tour.
- Event application: Board members can pay attention to people they know who are engaging in the chat, asking questions, etc. and then share that information with staff later.

Invite

Personally invite donors and prospects to participate

Based on what is known about donors and donor prospects, board members can invite them to the appropriate events or cultivation activities. This can include luncheons, galas, virtual tours, video updates, as well as donor specific events designed to further engage them in the mission. This can also include creating personalized activities like one-on-one coffee/Zoom get-togethers or house parties.

- Event application: Encourage board members to invite guests to the event. They can invite people in their own circles, and they can also invite major donors or lapsed donors to help get them to the event. Personal invitations matter – people asking people still gets participation, no matter if it's in person or in a virtual format.

Fundkit

Thank

Make the donors feel special

Adding personalized thank yous to a nonprofit's stewardship process is a simple but very effective way to cultivate donor relations and to increase their giving. Board members can play an important role by making thank you calls or sending personal notes to donors who have made significant gifts or attended events.

- Event application: Assign board members to thank a couple sponsors each at the event – in person or via the chat/comment space virtually – on behalf of the board.
- Event application: Ask which board members will commit to calling event donors the day after (or within a few days of) the event. Assign them names and share sample talking points so they feel comfortable.

Ask

Make the ask

Asks made by a volunteer are sometimes the most effective. There may be times when a board member is the best person to make the ask, either in an event situation or occasionally in a face-to-face setting. Not every board member is comfortable in this role, but some are and should be.

- Event application: Consider utilizing a board member to make the ask from the “stage” or in a video during the event.
- Event application: Ask the board to collectively provide a challenge match gift for donations made at the event.