



The Key to Your Organization's Financial Stability:

# Engage Your Board. Grow Donors.

WAYS TO LEVERAGE YOUR BOARD IN REACHING MORE DONORS

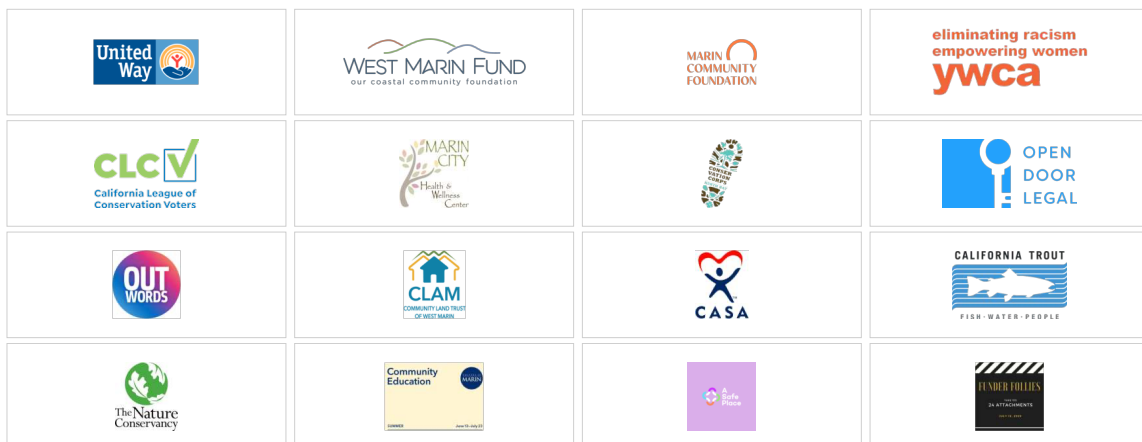
Presented by  
Melanie Hamburger  
[CultivateGiving.com](http://CultivateGiving.com)

June 10, 2026

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## About Me

Teaching fundraising + many nonprofit roles as a Development Team of 1



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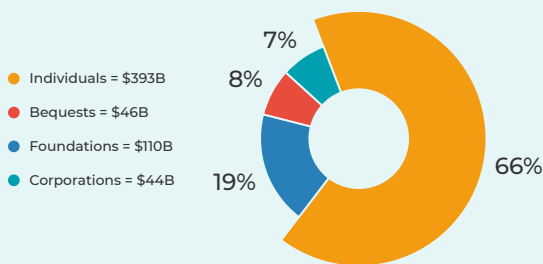
It isn't always this easy. But it *can* be.

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## Why connecting with **individual donors** matters

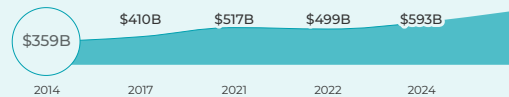
They give the most

Total giving in 2024 = \$593B



Source:  
[givingusa.org](https://givingusa.org)

Total Giving by Year



**It's a lot of money. Here's what we know:**

- Individuals give most, give quickly, give again, and (usually) increase giving
- Foundations have lots of assets, but only give 7.5% (2024 average)
- Women drive most giving decisions

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9%   
**We have 2-4 fundraising staff**

73%   
**Our ED is the only staff fundraiser**

18%   
**No staff fundraisers—all volunteers**

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18%   
**We have a Board Give/Get Policy**

27%   
**We have a Fundraising or  
Development Committee**

64%   
**We have a donor database**

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# It's not a surprise. Your **board approved your FY Budget!**

Access these templates!  
cultivategiving.com

- Board-approved document
- Expense = costs for staff, consultants, office space, equipment, supplies, ...
- Revenue must = or > than expense
- **Individual donations** have the greatest opportunity for growth (we'll talk more in March)

	B	C	D	E	F
<b>TOTAL EXPENSE</b>					<b>\$0</b>
<b>IUE</b>					
Grants Pledged/Received:					
Grant 1		\$			
Grant 2		\$			
Grant 3		\$			
Grant 4		\$			
					<b>\$0</b>
Grants Submitted/Pending:					
Proposal 1		\$			
Proposal 2		\$			
Proposal 3		\$			
Additional grants TBD		\$			
					<b>\$0</b>
Individual Donations		\$			
Events		\$			
Fee for Service		\$			

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## Your **Board Give/Get** to Build Revenue

Template at [cultivategiving.com/templates](https://cultivategiving.com/templates) with all the language you need

**Annual Board Commitment to ORG NAME**  
2026 Pledge Form

The **ORG** Board has approved a Give/Get policy of \$XXXX/year. This policy affirms the fiduciary role of each board member and the critical importance of your time, talent and treasure in supporting **ORG's** mission to **OurMissionStatement**. We ask that you raise at least \$XXXX towards our board-approved budget this fiscal year, and:

- *Make a gift at some level.* Your personal gift makes it possible for us to achieve 100% board giving.
- *Help secure additional gifts* through introductions or small gatherings. (Examples below.)

We know things can change – and **ORG ED** and **ORG Board Pres** are always available to talk with you about alternatives. Your pledge below helps us to honor you in supporting our work.

Between January 1 and December 31, 2026, I intend to give \$\_\_\_\_\_ to **ORG**.

My gift(s) will be by (check all that apply):

- Check payable to **ORG/ADDRESS**
- Online donation at **ORG URL**
- Appreciated shares of stock
- Charitable distribution from my IRA
- Matching gift from my employer; employer name: \_\_\_\_\_
- Other – please specify: \_\_\_\_\_

\_\_\_\_\_ In a single payment by this date: \_\_\_\_\_

\_\_\_\_\_ Equal payments made  quarterly or  monthly beginning: \_\_\_\_\_

\_\_\_\_\_ Other – please specify: \_\_\_\_\_

Name (as I'd like to be recognized): \_\_\_\_\_

In addition, I will help "get" additional gifts by:

- Hosting a small gathering in my home to introduce friends to our work
- Hosting a Facebook fundraiser for my birthday, to raise awareness and funding
- Making introductions within these social, civic or business network(s) \_\_\_\_\_

\_\_\_\_\_ and arrange an introductory meeting. (We never ask for money at the first meeting! Together, we'll learn connections to our work that may inspire support.)

\_\_\_\_\_ Connect us to a foundation or company for a grant, sponsorship or matching gift.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

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How to Build a Board **Culture** of Philanthropy

## Engage your **Board**

Boards have a *fiduciary* responsibility. And they can do something staff cannot: build trust as **peers**.

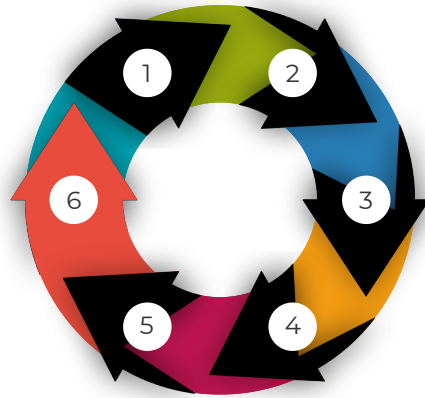
- |  |  |
|--|--|
| <p><b>100% Giving</b></p> <ul style="list-style-type: none"> <li>• Every board member makes a personal gift at some level</li> <li>• Even community members can participate – \$5 counts</li> </ul>  | <p><b>Give and Get</b></p> <ul style="list-style-type: none"> <li>• Board-approved policy where every board member commits to giving – or helping to raise – a certain dollar goal</li> <li>• Discuss. Recommend. Approve. Give.</li> <li>• (Homework on this)</li> </ul>  |
| <p><b>Development Committee</b></p> <ul style="list-style-type: none"> <li>• Meet monthly. Discuss &amp; implement quarterly donor outreach. Share updates at board meetings.</li> <li>• Discuss FYTD revenue. Brainstorm simple activities to cultivate major donors.</li> <li>• <b>Put every new board member on this committee</b> and build a culture of philanthropy from the start!</li> </ul> | <p><b>Meet with Donors</b></p> <ul style="list-style-type: none"> <li>• The best training on fundraising is attending a real meeting with a real donor</li> <li>• Partner board with staff for donor meetings, site tours, and <i>stewardship</i> (thanking)</li> <li>• Create simple phone and email scripts</li> </ul> |

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## Homework: Plan a timeline for your board to adopt a Give/Get Policy in 2026

Your nonprofit's financial stability is part of every board member's **fiduciary responsibility**.

- 1 Run a report of last year's board giving (total \$ & % of board members who gave, *not* gifts by name)
- 2 Meet with your Board (& Fundraising) Chair on the importance of 100% board giving and a Give/Get Policy. Their buy-in is *key*.
- 3 Add an agenda item at an upcoming board meeting. Have your Board &/or Fundraising Chair present 2025 data on board giving.

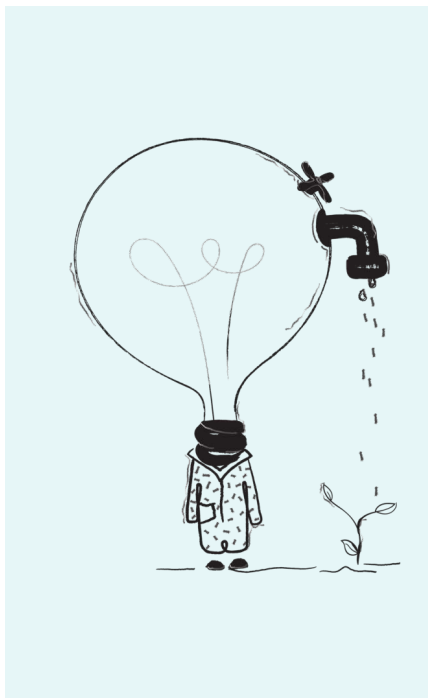


- 4 Ask for feedback. Listen, learn and address concerns. Everyone can make a gift at *some* level.
- 5 Have a board member make a motion to adopt a Give/Get Policy that addresses these concerns.
- 6 Vote! Distribute a pledge form for the current FY and ask board members to complete it before the next board meeting.

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Let's take a breath.

Ahhhh.

What's your first step  
to **cultivate giving?**

Name **1 way** you will get your board more engaged in fundraising this year?

*Always, always, **always** start with what feels easiest. (Otherwise it's hard to start.)*

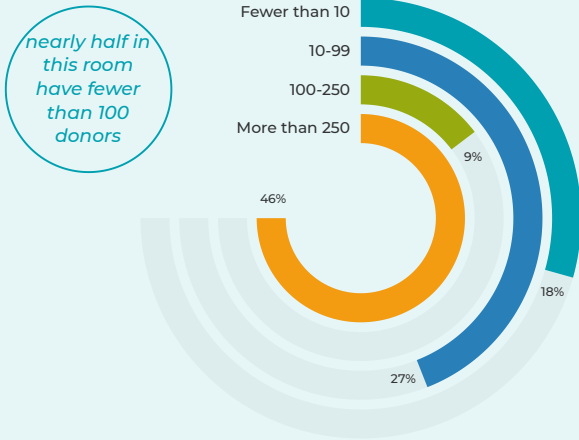
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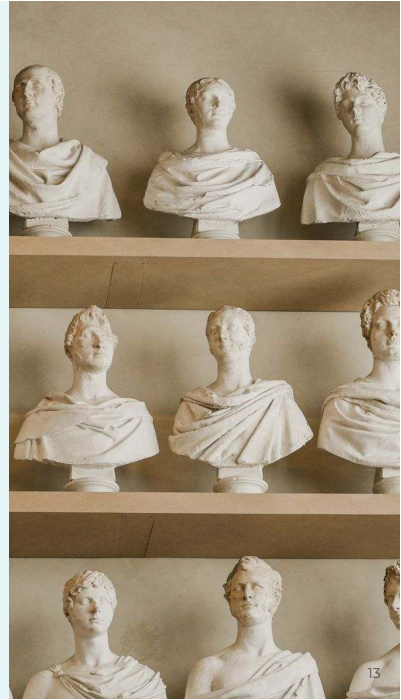
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## Number of Individual Donors

Let's get the board off a pedestal so they can help connect with donors!



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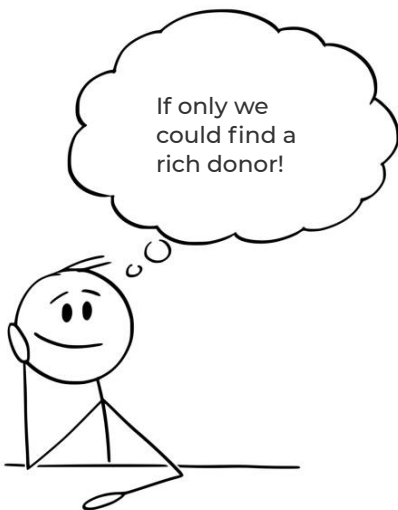
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## What doesn't work.

One big donor is not a plan for financial resiliency!

3 reasons why this way of thinking is not helpful:

- 1 | A one-time gift will not fix whatever isn't working
- 2 | We're surrounded by "rich" people. Connecting around shared interests and building trust is the *only* way to build major gifts.
- 3 | UW (and the San Joaquin Community Foundation) are **allies**. Keep them informed. *José, anything to add?*



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# Getting on Target to Diversify Revenue

Picture a solar system of donations. Individual donors are the sun.

## 1 | **Who are your donors?**

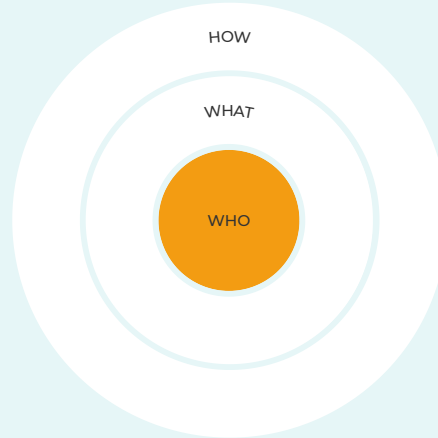
You don't need to find "rich people."  
Just start to connect with those who know you (or your issue area)

## 2 | **What will you say?**

"We're struggling" may be honest, but it's not inspiring. Your vision is.

## 3 | **How do you manage it all?**

Free tools to make it easy to get your board (and allies) on board



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## Number of people who receive your **email updates**

### **What was a recent email that you sent?**

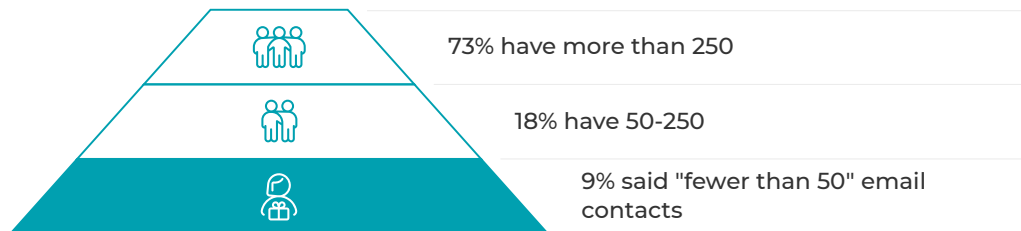
"Never"

"Early May for 209Gives Countywide Campaign" (2)

"Attend or sponsor our upcoming events" (4)

"Monthly newsletter with our 24-25 Impact Report"

"Send a few times a year"

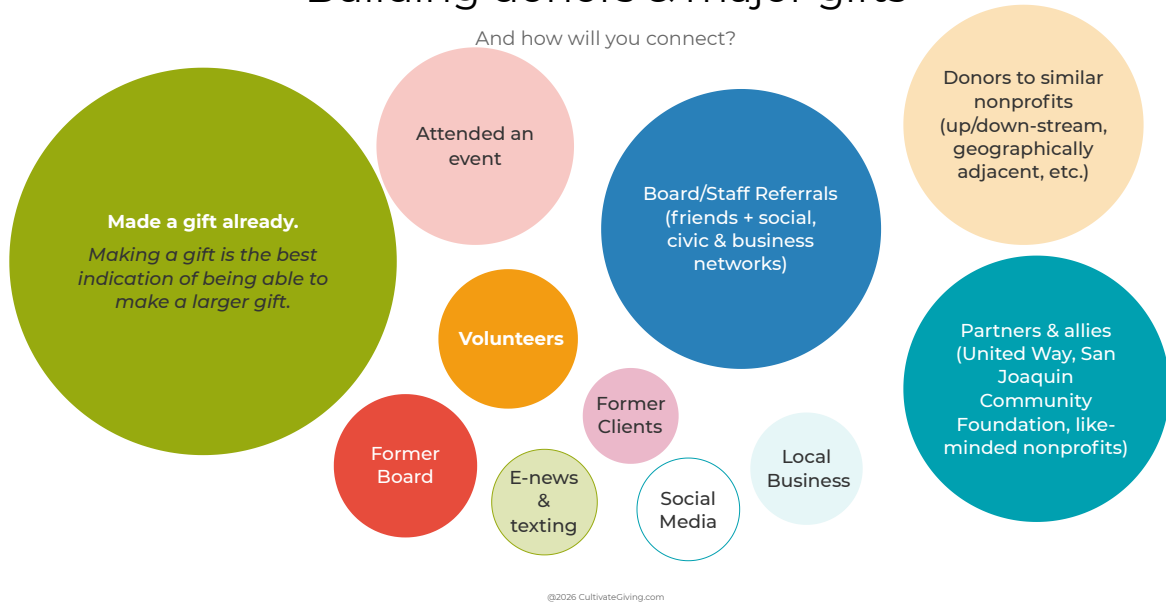


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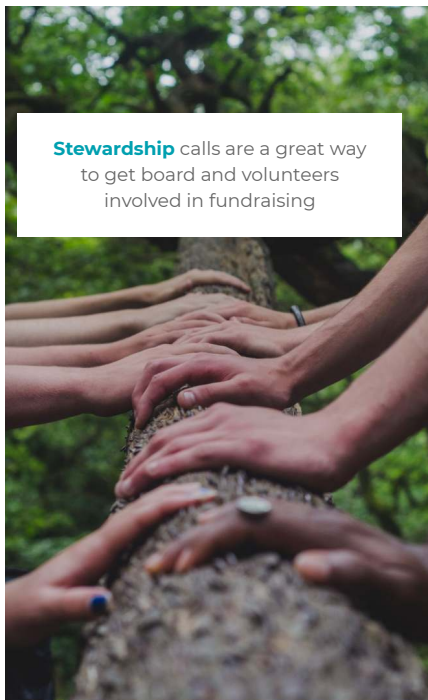
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# Building donors & major gifts



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**Stewardship** calls are a great way to get board and volunteers involved in fundraising

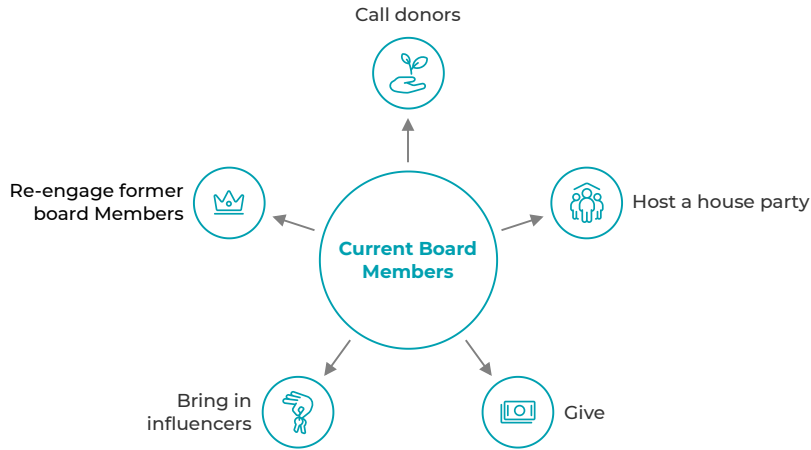


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## Breakout: How will your board help?

You have a small staff and lots of donors to reach. **This is part of every board's fiduciary responsibility.**



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## Getting on Target to Diversify Revenue

Now craft a (simple) message to engage that audience in a conversation

### 1 | **Who** are your donors?

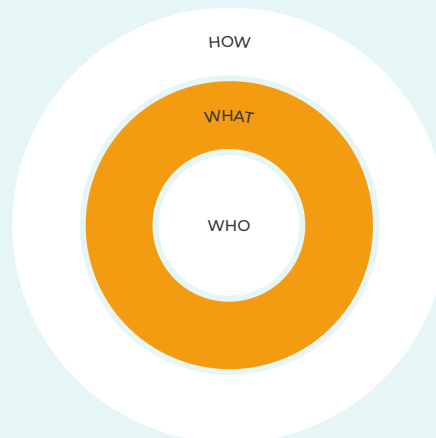
You don't need to find "rich people."  
Just start to connect with your allies.

### 2 | **What** will you say?

"We're struggling" may be honest,  
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### 3 | **How** do you manage it all?

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# Regular communication with donors (& prospects) pays off

The Rule of 7 — *It takes 7 times of seeing something [like your email] for it to stick*



## What to Say

The goal is *always* to talk to a donor. It can take a lot of tries before you connect personally. Be patient and don't give up.

Do easy things, consistently.

### Share News

- Media coverage
- How your work connects to a current event
- Client success story
- Project launch or completion – repurpose language from a grant report

### Keep trying!

- By email *and* phone
- Website (& social media) pop-up or banner
- Hand-written note or appeal
- *Persistence pays off. (Think about your own in-box. Do you get to every email?)*

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Your support means a lot to our work.  
How did you first learn about our nonprofit?

Ask why they give to **you**.

We so appreciate your increased gift last year.  
What inspired your generosity?

Or why they gave **more**?

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"How did you come to care about this issue?"

*Why is **your** work meaningful to them?*

"We would love to show you how our programs make an impact. *When can you and your family join us for a site tour and to hear our staff's vision for the future?*"

*Set up the **next step!***

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Ask for money you get advice.

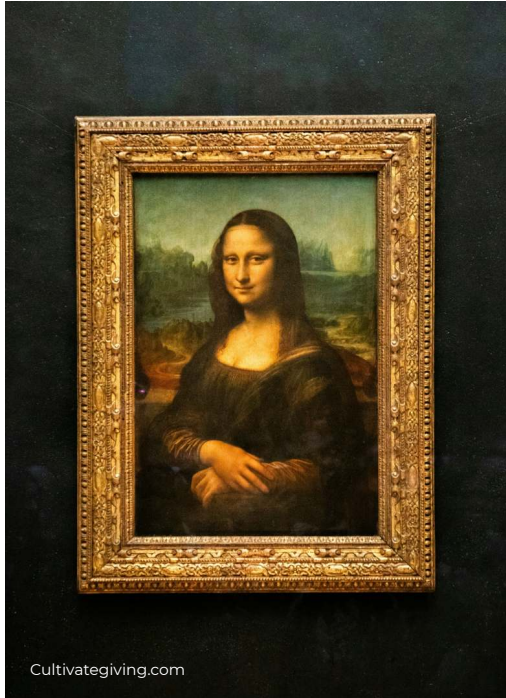
Ask for advice you get money.

*fundraising adage*

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## Donor messaging & your big picture

Create a fundraising tool that can be printed on one page, back-to-front (use our template) that includes:

- Brief overview (of organization & leadership)
- Project impact (*not* activities!)
- Clients, community & partners
- Budget (include 15% overhead)

Template



It doesn't need to be a masterpiece.  
It can be imperfect or incomplete. **Ask donors to help you get there** – and for advice on your messaging!

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## Repurpose & Refine

Perfection is overrated. Only 1 audience can tell you whether you've got the right message: **Donors**

### Use existing language

- Grant proposals
- Your website
- ai meeting notes
- Create a template to tell your story ... and go tell your story

*Start with imperfect*

### Focus on Impact & Cost

- Inspire with your *vision*
- **Don't** ask for an amount. Tell them the total impact and cost of that impact, and ask how they can help make it a reality.
- Create a ~2-page Impact Statement to tell the story from broad to specific

*Invite donors to join you in making your vision a reality*

### Evolve

- Ask for advice. "What resonates most with you about this?"
- Invite them in as insiders. Bring them along on this journey. Make them feel special.
- Experiment and have fun learning

*Edit, update, and improve*

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## How it Sounds – **Remember asking for advice?**

Now use your 2-pager for donor engagement!

"As a businessman and friend, you have perspective I value. May I get your advice on a 2-pager we've created to describe our work?"

*Don't forget to follow up and let them know how you used their feedback!*

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## Oh Melanie, it's you. **What do you want?**

Intimidating question? Or just a platform to ask for what you need?

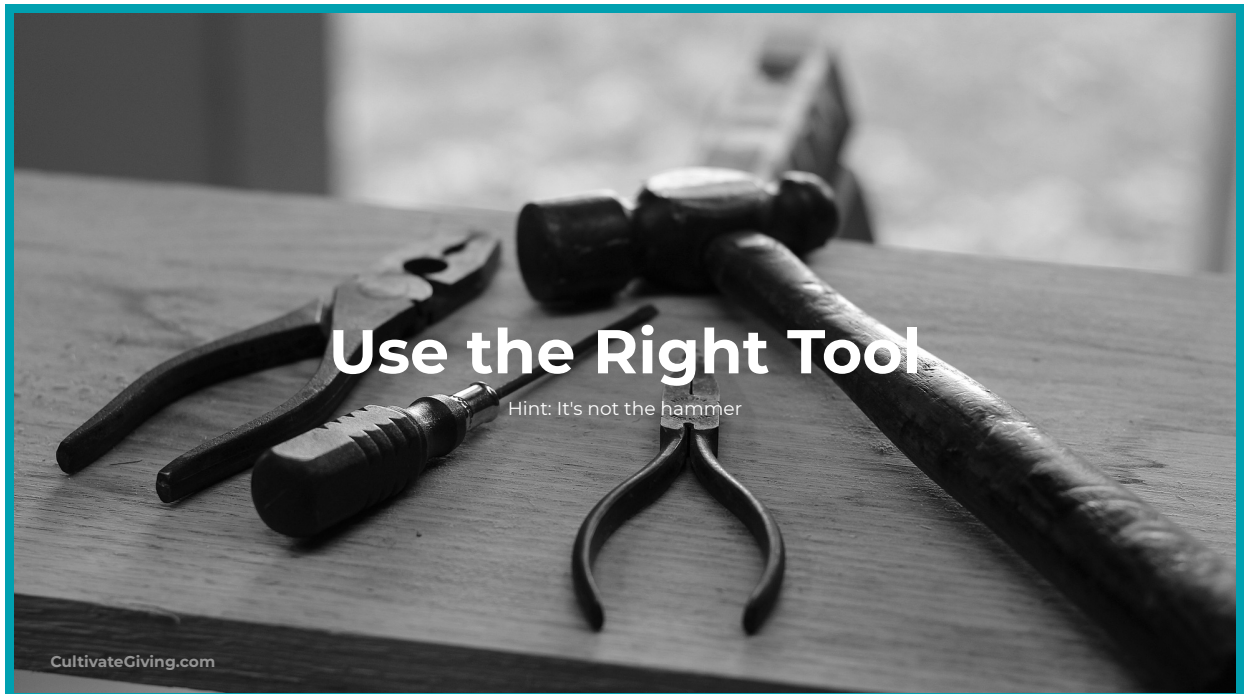


### **It's personal. But don't take it personally.**

Never assume that someone doesn't want to talk to you because of how they sound or their lack of response. People are just busy.

*My journey with this donor went from \$20,000 to \$250,000 over 3-years, with several trips through the cultivation cycle, project tours in 2 states, and hearing a lot of "no" along the way.*

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# Getting on Target to Diversify Revenue

The right tools always make the job easier. And the best tools are your fiercest advocates: **Board members.**

## 1 | **Who** are your donors?

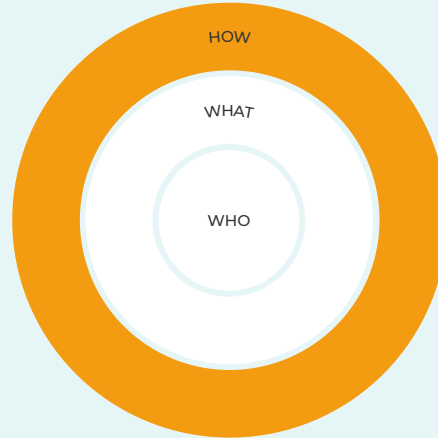
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Simple steps will help your  
board to connect with donors

## Start with what feels easy.



### Call and email 5 donors

*Thank them* for their support. Ask for their advice. Learn why they give. Listen.



### Connect quarterly

Think of *simple messages* you can share: updates, client success, site tour, event invite



### Monthly Committee

Report back at *board meetings* on activities, YTD donations, and board giving



### Host a house party

Small and casual is good – the *right 10 people* in the room can make a big financial impact

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# Donor Databases that I Use & Like

You cannot build major gifts by tracking it all (*donors, calls, meetings, RSVPs, connections*) in spreadsheets



Free donor database with built-in online gift processing  
Simple donor management for individuals  
[givebutter.com/pricing](https://givebutter.com/pricing)



Free licenses for nonprofits  
Excellent tracking for individual and institutional donors, relationships, and custom fields. Lots of reports.  
[salesforce.com/company/power-of-us](https://salesforce.com/company/power-of-us)



Integrates email, payments and events seamlessly  
Great graphics and user friendly. Costs start ~\$200/mo. (We can help negotiate pricing and features.)  
[try.bloomerang.co/communitygrantwriters](https://try.bloomerang.co/communitygrantwriters)

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PROPOSED: Major Gift Goal	Need More Info	Last gift year	Lifetime Revenue Range (to determine)	First Name	Last Name	City	State	Lifetime Revenue	Latest Transaction Amount	Latest Transaction Date
\$100,000+	<input type="checkbox"/>	2024	\$10k-\$24999			Blaine	WA	\$18,859.24	\$2,500.00	4/2/2024
\$100,000+	<input type="checkbox"/>	2024	\$10k-\$24999			Los Angeles	CA	\$12,134.05	\$1,500.00	4/2/2024
\$100,000+	<input type="checkbox"/>	2024	\$10k-\$24999			Los Altos	CA	\$10,617.42	\$102.56	4/2/2024
\$100,000+	<input type="checkbox"/>	2023	\$25k+			San Francisco	CA	\$192,500.00	\$75,000.00	3/22/2023
\$100,000+	<input type="checkbox"/>	2023	\$25k+			Pasadena	CA	\$70,000.00	\$20,000.00	8/10/2023
\$100,000+	<input type="checkbox"/>	2023	\$25k+			Portola Valley	CA	\$40,000.00	\$10,000.00	10/17/2023
\$25,000	<input type="checkbox"/>	2023	\$25k+			Grove City	PA	\$27,800.00	\$2,000.00	12/5/2023
\$10,000	<input type="checkbox"/>	2023	\$10k-\$24999			Haiku	HI	\$19,160.98	\$102.56	10/5/2023
\$100,000+	<input type="checkbox"/>	2023	\$10k-\$24999			Oakland	CA	\$16,647.99	\$1,278.43	10/16/2023
\$10,000	<input type="checkbox"/>	2023	\$10k-\$24999			West Bath	ME	\$14,600.00	\$2,000.00	12/18/2023
\$100,000+	<input type="checkbox"/>	2022	\$10k-\$24999					\$20,116.77	\$2,500.00	6/27/2022
\$25,000	<input type="checkbox"/>	2022	\$10k-\$24999					\$18,635.48	\$4,605.00	10/27/2022
\$10,000	<input type="checkbox"/>	2022	\$10k-\$24999					\$16,250.00	\$5,000.00	11/15/2022
\$25,000	<input type="checkbox"/>	2021	\$10k-\$24999					\$10,000.00	\$10,000.00	10/18/2021
\$25,000	<input type="checkbox"/>	2024	\$5k-\$9999k			New York	NY	\$6,499.27	\$103.83	3/25/2024
\$25,000	<input type="checkbox"/>	2024	\$5k-\$9999k					\$6,000.00	\$500.00	1/5/2024
\$25,000	<input type="checkbox"/>	2024	\$1k-\$4999k			West	CA	\$4,709.36	\$102.56	4/4/2024
\$25,000	<input type="checkbox"/>	2024	\$1k-\$4999k			Missoula	MT	\$3,628.76	\$51.96	3/31/2024
\$25,000	<input type="checkbox"/>	2024	\$1k-\$4999k			Portland	ME	\$3,500.00	\$500.00	1/3/2024
\$10,000	<input type="checkbox"/>	2024	\$1k-\$4999k			Sacramento	CA	\$3,255.88	\$51.96	4/1/2024



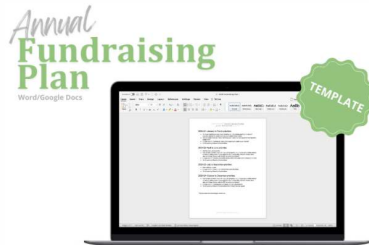
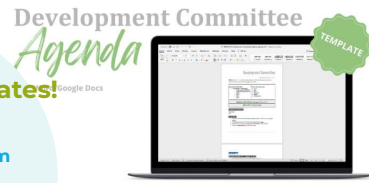
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## Template Collection

Fundraising just got easier. Enjoy these templates to help you write grant proposals, grow your donor base, plan for growth, and engage your board. Need help with your template? Contact us, and we'd be happy to support!

- DOWNLOAD  
Individual Donor Templates
- DOWNLOAD  
Planning Templates
- DOWNLOAD  
Board Engagement Templates
- DOWNLOAD  
Grant Writing Templates

**Free board & fundraising templates!**  
 Use this link...  
[my.cultivategiving.com](https://my.cultivategiving.com)  
**You're also member!**  
 Access members-only content & fundraising forums at no cost.



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## Your Quarterly Plan to Create Ease around Fundraising

It can look as simple as this

You have access to our templates

### YOUR NONPROFIT Annual Fundraising Priorities January – December 2026 [or your FY]

#### 2026-Q1–January to March priorities:

- Schedule monthly/quarterly board Development Committee meetings to help with quarterly outreach to donors and hosting 2 small events in 2026
- Discuss Board Give/Get Policy\* and have each board member sign their 2026 donation pledge form
- Engage board in thanking all major gift prospects who made a year end gift
- Send quarterly eNews to all subscribers

#### 2026-Q2–April to June priorities:

- Identify major gift prospects
- Host simple cultivation event for major gift prospects – e.g., house party (coffee meetup or wine) or online event on time-sensitive issue (media story, election-related, client story in a Zoom "fireside with the ED" or small panel format)
- Engage board in emailing a program update and inviting major donor prospects to meet
- Send quarterly eNews to all subscribers

#### 2026-Q3–July to September priorities:

- Host cultivation event
- Engage board in follow up to event invitees and attendees
- Send quarterly eNews to all subscribers

#### 2026-Q4–October to December priorities:

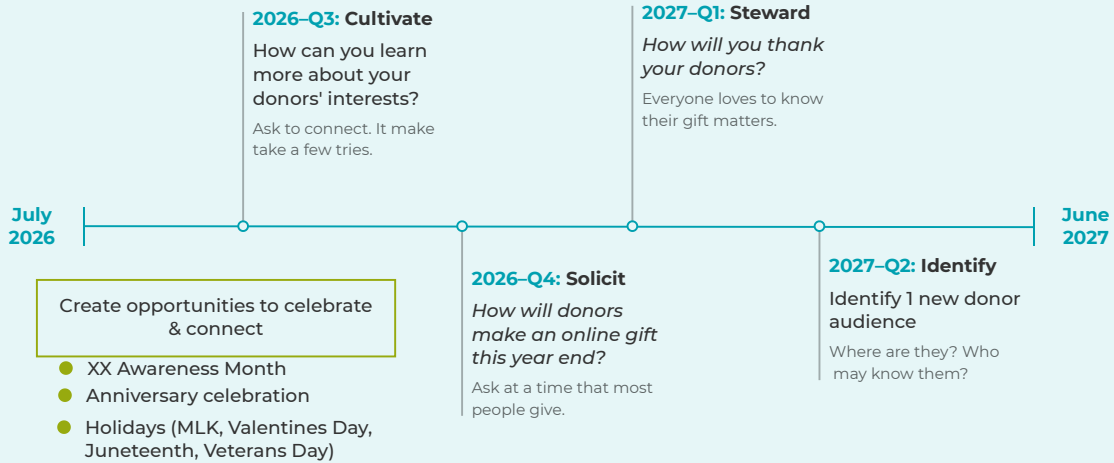
- Host simple cultivation event for major gift prospects – e.g., house party (coffee meetup or wine) or online event on time-sensitive issue (media story, election-related, client story in a Zoom "fireside with the ED" or small panel format)
- Engage board in sending year-end appeal to major gift prospects
- Send quarterly eNews to all subscribers &/or Giving Tuesday appeal

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# Your Quarterly Plan to Build Donors

Do something each month. Start with what feels easy. Try it a few times to let it stick.



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## Timely communication makes people feel special

Getting this part right will make the rest much easier



### When to Say It

#### Sooner

Within 48 Hours:

- Acknowledge gifts
- Use a database to track gifts (and calls/emails/meetings)
- Who responds to your website "Contact Us" form?
- Try to give online monthly. Is it easy?

#### & Later

Monthly to Quarterly:

- E-newsletter – use a template and keep it brief
- Project tour or fireside with the ED (in person or be virtual)
- "Personal" update on something that excites *you*
- Hand-written note

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## Scripts make is easier

Help get (your board) started. It's conversational.

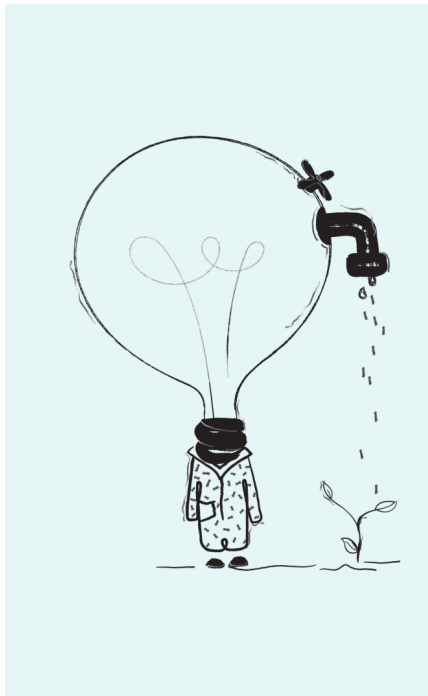
"I'm a volunteer board member of our amazing nonprofit, and **want to thank you**. I'd love to let you know how your support made a difference in our work last year. I'd be so thrilled to talk by phone at your convenience ..."

"I'm calling to **ask if you saw our email about a fireside chat with our executive director**. If that date doesn't work, perhaps we can talk by phone at your convenience. Looking forward to thanking you in person!"

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## That's a Lot!

Let's take another breath.

Ahhhh.

OF ALL THESE WAYS TO ENGAGE YOUR BOARD & DONORS

### which 2 things

WILL YOU TRY BEFORE JULY 1?

*Remember to start with whatever feels easiest.  
(Starting is the most important part!)*

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## You can do this!

1. Your board has a **fiduciary** responsibility for your nonprofit. That's fundraising.
2. Board members uniquely connect with donors as **peers**, something staff cannot do.
3. There are lots of ways to engage donors. Start with what feels **easiest** and build.

## Connect



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LinkedIn @melaniehamburger

in @cultivategiving

Let's talk fundraising! Schedule time at [CultivateGiving.com/meet](https://CultivateGiving.com/meet)

You have access to members-only fundraising resources and templates at [my.cultivategiving.com](https://my.cultivategiving.com)