

Board Fundraising Guide

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2016 Fundraising Goals and Opportunities

ECODISTRICTS 2016 FUNDRAISING GOAL: \$1.4 million

BOARD MEMBER 2016 FUNDRAISING GOAL: \$10,000 per board member by September 2016

OPPORTUNITIES FOR BOARD SUPPORT: The biggest opportunities for the Board of Directors to leverage their networks and connections to support our fundraising goals include:

- **GROW ORGANIZATIONAL MEMBERSHIP** — Secure 2-3 organizational members
- **GROW SUMMIT SPONSORSHIP** — Secure 2-3 sponsors for the 2016 EcoDistricts Summit
- **SUPPORT FUNDER CULTIVATION** — Commit to make one personal call per month or send a hand-written card in the mail to thank a new donor, sponsor, or member. Beyond saying thank you, ask them why they supported us; record this feedback and send it to Marissa Mastors at marissa@ecodistricts.org.
- **BE AN ECODISTRICTS AMBASSADOR** — Help us identify more “points of influence” and introduce us to new organizations to cultivate new partnerships and new funders. Participate in our EcoDistricts intro training and use our Powerpoint deck and talking points to show how we’re changing the world.
 - Introduce EcoDistricts to 40 Points of Influence prospect list
 - Introduce EcoDistricts to foundations in your network that align with EcoDistricts’ work
 - Give direct insight into our prospective customers, members or sponsors to help strategize the best approach to soliciting them

Qualifying Your Prospects

Effective fundraising (just like sales) is about building win-win partnerships that (by the way) help you meet your revenue goals. It begins and ends with understanding what’s most important to your prospect. We strongly encourage you to use the questions below to identify and rank prospective organizational members, sponsors, and/or business line partners based on their fit with EcoDistricts and the breadth of your existing relationship. Every “yes” answer gets 1 point in the “score” column. Pursue prospects that rank a **5 or higher**. Once you’ve ranked your prospects, focus only on the top 3-5 with the highest rating per quarter. If you need support with prospect research, contact Marissa Mastors at marissa@ecodistricts.org.

QUALIFIER	SCORE
1. You have an established relationship with a decision-maker at the organization	
2. The organization and EcoDistricts have a similar mission and/or business goals	
3. The organization’s most important markets align with the location of EcoDistricts’ convening(s), and/or where we have a strong presence via Target Cities and Incubator alumni	
4. The organization has a <u>moderate to deep</u> understanding of EcoDistricts’ work	
5. At least one of the major audiences EcoDistricts’ serves is a primary customer of the prospect organization	
6. You have at least a moderate understanding of what’s most important to the prospects’ organization (e.g., specific values, business goals, markets, etc.)	
7. The opportunities we offer are of value to the organization (e.g., they care about positioning themselves as an industry leader to our target audiences, etc.)	
8. You’re confident that the prospect can afford the contribution and that funds are available (if possible, you have evidence or confirmation of this fact)	
TOTAL POINTS	

Before the Ask

MAKING THE INTRODUCTION

Fundraising is about building relationships, which is why the introductory email is really about getting the prospect's attention and scheduling a face-to-face meeting or phone call for the substantive conversation. Adapt and customize our sample introductory emails based on your existing relationship, the audience, and what you aim to talk about. Attach the supporting collateral (described below) in your introductory email, and follow up to get the call or meeting scheduled. A few tips we suggest to reduce lag time between your first email and getting the call scheduled:

- **Make it personal. Refer to your relationship, shared goals, etc.**
- **Be clear, ask for meeting and list your availability.**
- **Don't overwhelm the contact with too much information. Wait for the phone call to dive deeper.**

Making the Ask

FRAME THE CONVERSATION

Once you have the undivided attention of a prospect, the biggest mistake fundraisers make is spending too much time talking about their organization (or event) and not enough time understanding their prospect. Use the guidelines below to frame your conversation and discover more about what's most important to your prospect. Adapt your ask to reflect this understanding while remaining committed to your fundraising goals.

- **CONFIRM THE CALL "AGENDA"** — "I'd love the chance to introduce EcoDistricts and share some exciting progress we're making this year in sustainable development. I'd also like to give you a chance to tell me more about [ORGANIZATION NAME]'s top goals for 2016 — key markets, industries or initiatives you're working on to see how we can align and support one another's goals. And finally, I'd like to explore a few opportunities for [ORGANIZATION NAME] to support our work while providing some valuable [business development, brand equity, exposure, etc.] for you."
- **INTRODUCTIONS** — Introduce yourself and your role with the Board of Directors. Introduce the organization, but only briefly, using the "About EcoDistricts" talking points. You're really just setting the tone for the conversation. Let your prospect introduce him/herself.
- **TELL ME A LITTLE MORE ABOUT YOUR ORGANIZATION — namely, what are your most important business goals for the year ahead, including most important markets?**
Listen for connections between their answer and the opportunities associated with EcoDistricts membership or sponsorship.
- **DIVE DEEPER.** E.G, If your ask involves sponsorship, use the talking points provided to describe the Summit (its purpose, its solid reputation, and our vision for the 2016 event); or describe Organizational Membership in the broader context of our goal of building a movement and accelerating thought leadership. Your goal is to build excitement about the opportunity and integrate the opportunity to the prospect's goals and your shared mission, etc. Listen for cues regarding what type of business development, networking, or exposure opportunities are most important to the prospect and shift the conversation accordingly.

SUPPORTING COLLATERAL

We've created a complete toolkit of collateral and materials to support your fundraising and ambassador efforts. Use the links below to access the most up-to-date version of the collateral at any time. We suggest including the prospectuses and/or one-sheet as an attachment in your initial email to the prospect, giving them a chance to scan the information prior to your first call.

- **MEMBERSHIP SOLICITATION KIT** — Includes talking points about EcoDistricts and the Summit, sample emails, sponsorship prospectus, and About EcoDistricts one-sheet.

- **SUMMIT SPONSORSHIP SOLICITATION KIT** — Includes talking points about EcoDistricts and the organizational membership, sample emails, membership prospectus, and About EcoDistricts one-sheet.
- **ABOUT ECODISTRICTS + THE PROTOCOL AMBASSADOR KIT** — Includes About EcoDistricts and the Protocol overview slide deck, About EcoDistricts one-sheet, and talking points.

Closing the Ask

Most fundraising asks take 4-5 points of contact before they close. Decision makers are busy people, and your ask may require a few rounds of negotiation before you can get to “yes.” After your initial call, we recommend the following steps to help get to “yes”. **BE SURE TO BCC MARISSA MASTORS at marissa@ecodistricts.org ON ALL EMAILS.**

- **Follow up the call by email within 48 hours** — Recap the call to reiterate your understanding of what’s most significant to the prospect, including iterating which benefits are most important to them or any action items you took from the call.
- **Where needed, contact Marissa Mastors to develop a customized membership or sponsorship proposal and/or sponsorship agreement.**
- **Schedule a follow up call to move to next steps**
- **Once you’ve secured a verbal or email-based “yes”, contact Marissa Mastors to generate a sponsorship agreement and invoice.**

SUGGESTED SOLICITATION TIMELINE:

April 22 (Board Retreat):

- Come with a list of your 5-10 top tier projects, based on the Qualifying Chart found in the Board Solicitation Toolkit.
- Schedule a time to have a one-on-one conversation with Marissa in order to:
 - Solidify the ask strategy for each prospect
 - Discuss support needed from Marissa (drafting emails, research, etc.)
 - Decide on best way to track and inform Marissa of your progress moving forward

By June 1:

- Initial email or phone communication made to all top prospects
- First deep-dive calls scheduled for June

By July 1:

- Deep-dive phone conversations completed
- Follow-up emails sent to prospects with any additional information requested provided
- Next steps established with each prospect, follow up calls scheduled

By August 1:

- Follow up conversations completed with formal ask made
- Benefits for membership/sponsorship are discussed, negotiated, and agreed upon
- Next steps established with each prospect, follow up calls scheduled

By September 1:

- Asks accepted
- Solicitor sends details of contributions to Marissa
- Agreements and invoices drafted and sent by Marissa

By October 1:

- Agreements are signed and payments received
- Board solicitor makes calls to thank donors for their contribution