



WASHINGTON COUNTY  
COMMUNITY FOUNDATION

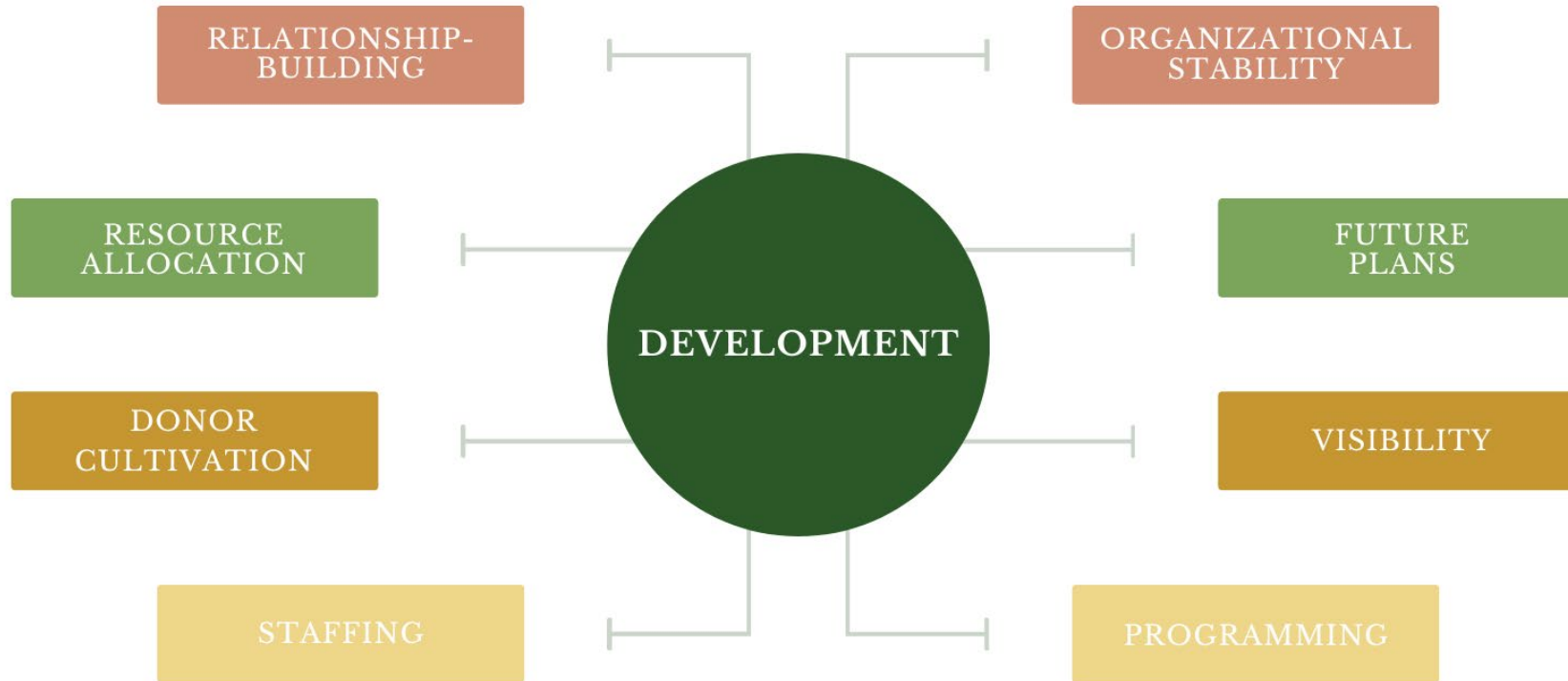
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**CHARITY  
TRAINING  
2022**



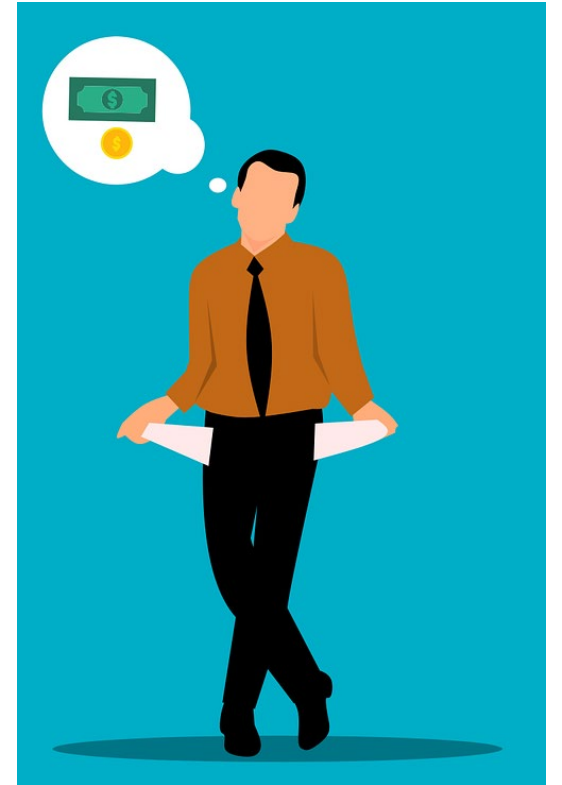
# WHY ARE WE TAKING THIS ROUTE?



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We know for a fact that there have been instances in which a registering charity has not raised anything through *WCCF Gives*.

# WHY????????



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# WHY ARE WE TAKING THIS ROUTE?

Development is not passive.

**You must fuel  
the fire!**



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# WHY ARE WE TAKING THIS ROUTE?

Sometimes, we overlook the obvious!  
Our board members are often our  
most loyal, passionate, and generous  
supporters.

If you are not asking them to give,  
especially through *WCCF Gives*, you  
are missing an opportunity!



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# WHY ARE WE TAKING THIS ROUTE?

Strong Leadership = Strong Charities!



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# TODAY'S OBJECTIVES

1. Address the advantages of an engaged board
2. Outline tips for identifying prospective board members
3. Offer strategies to help you mold your board members into top-notch organization ambassadors
4. Introduce a new **\$5,000** incentive for *WCCF Gives*
5. Highlight some important details about *WCCF Gives*





# The Advantages of Engaged Board Members

- Are committed to the mission
- Move in sync with the organization's established objectives
- Enable the charity to accomplish more (particularly true when the Board Chair and President/Executive Director are aligned)
- Are passionate; Feel connected to the work of the charity
- Share their passion with others





# Building a Strong Board

- Is your board an appropriate size? Does it adhere to your bylaws/industry best practices?
- Do you have a committee structure?
- Do you assess the composition of your board?
- Do your board members possess a range of skill sets and professional backgrounds?
- Are your board members active and engaged? Is participation evaluated?
- **Do your board members support the organization financially?**
- Do your board members have any conflicts of interest? Are they problematic?
- Are your board members making positive contributions?
- Do your board members truly understand their role and responsibilities?



# Building a Strong Board

- Recruit Proactively
  - The reality is, in order to build the most effective and productive board, you must be proactive.
    - Understand what you need.
    - Identify quality candidates that align with your needs.
    - Go after those candidates!



*A word of caution: Recommendations from other board members can be excellent leads, as long as you keep your charity's needs in perspective.*



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# Building a Strong Board

- Think Strategically
  - Read local news and social media feeds.
  - Review your charity's corporate donor list.
  - Take advantage of free resources that can identify prospects.
    - Leadership Washington County Resource Connection Center  
<https://rcc.palwc.org>





# Building a Strong Board

- Plan with Purpose
  - Be on the lookout 24/7, 365.
  - Keep a list. Time it right.
  - Start the recruitment process well in advance of when you need to formally advance candidates.
  - Don't force it. Consider other opportunities for engagement.





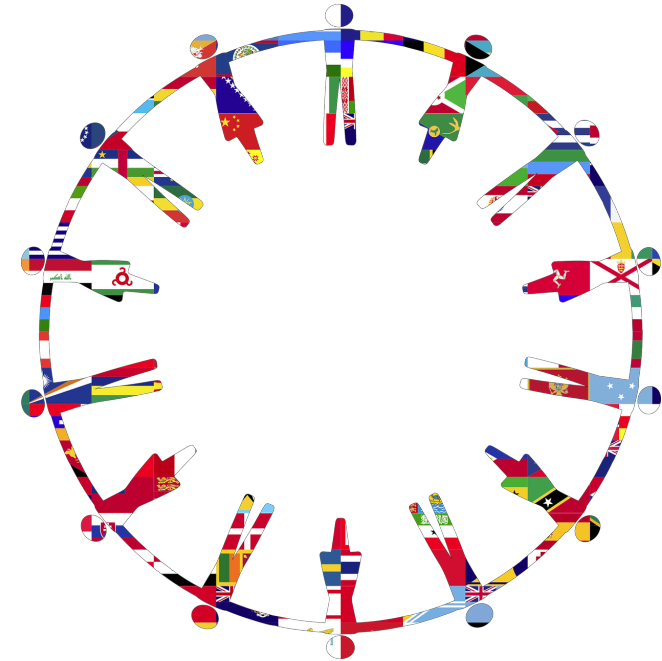
# Building a Strong Board

- Onboard Effectively
  - Outline expectations clearly.
  - Explain processes and organization dynamics.
  - Emphasize the role of governance and its responsibilities.



# From “Volunteer” to “Ambassador”

1. Foster Understanding
2. Inform
3. Prepare
4. Strengthen the Relationship



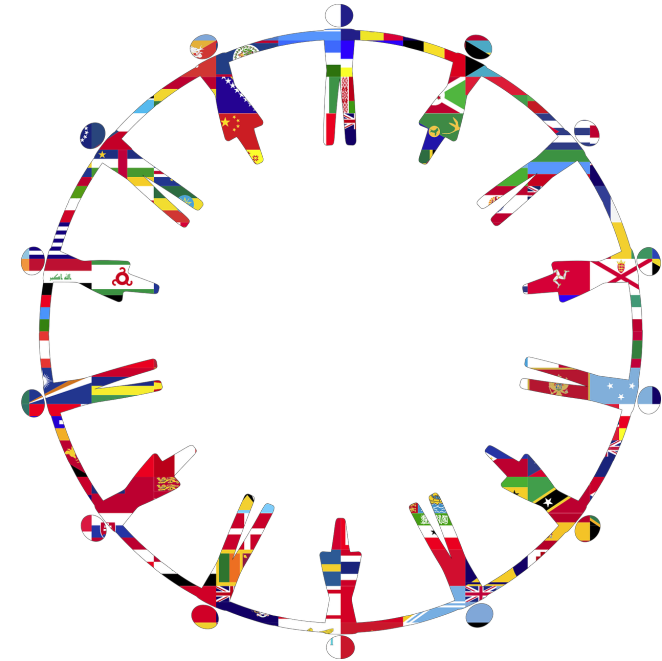
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# From “Volunteer” to “Ambassador” (Cont.)

5. Include
6. Ask
7. Thank



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# Additional Resources & Training

- Boardsource.org
- Next in the Series:

“Keep Your Board on Track”



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# POP QUIZ

*What was your charity's board participation percentage during Gives 2021?*

- a.) 100% - Everyone on our board at the time made a gift!*
- b.) More than 50% but less than 100%*
- c.) More than 25% but less than 50%*
- d.) Less than 25%*
- e.) Too embarrassed to say*
- f.) Absolutely no idea . . . Seriously, I couldn't even make up a number for the sake of this exercise.*





# New for 2022! *Get Your Board on Board Challenge*

WCCF Gives charities that secure 100% board participation through the day of giving will be entered for a chance to win a **\$5,000 grant** from the *Acorn Fund*.



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## *Get Your Board on Board Challenge (Cont.)*

1. Provide your Board members' names and contact information to the WCCF via this link:  
[https://wccf.formstack.com/forms/board\\_reg](https://wccf.formstack.com/forms/board_reg)
2. Your Board schedule **must be submitted by August 31.**



## *Get Your Board on Board Challenge (Cont.)*

3. After *Gives* day, the WCCF will cross your provided Board schedule against your list of *Gives* donors.
4. Only WCCF *Gives* charities with 100% board participation will be entered for a chance to win a \$5,000 *Acorn Fund* grant.





## Get Your Board on Board Challenge (Cont.)

- Your Board member schedule must include the email address that person will use for giving/receipting. If possible, phone numbers should also be included.
- In order to be considered towards the participation percentage, a Board member's name must be included in the payment method and/or the acknowledgement line.
- Anonymous giving is possible for Board members who wish to do so. But, the Board member's name must be included in the payment method.
- All gifts must be WCCF Gives-eligible (made by check or credit card; \$25 or more; postmarked by September 15).



## *Get Your Board on Board Challenge (Cont.)*

- Since board sizes vary greatly, the Foundation will be tracking the board participation percentage instead of number of board members who give. (But remember, each board member also will count towards the pro-rated \$50,000 donor bonus pool distribution.)

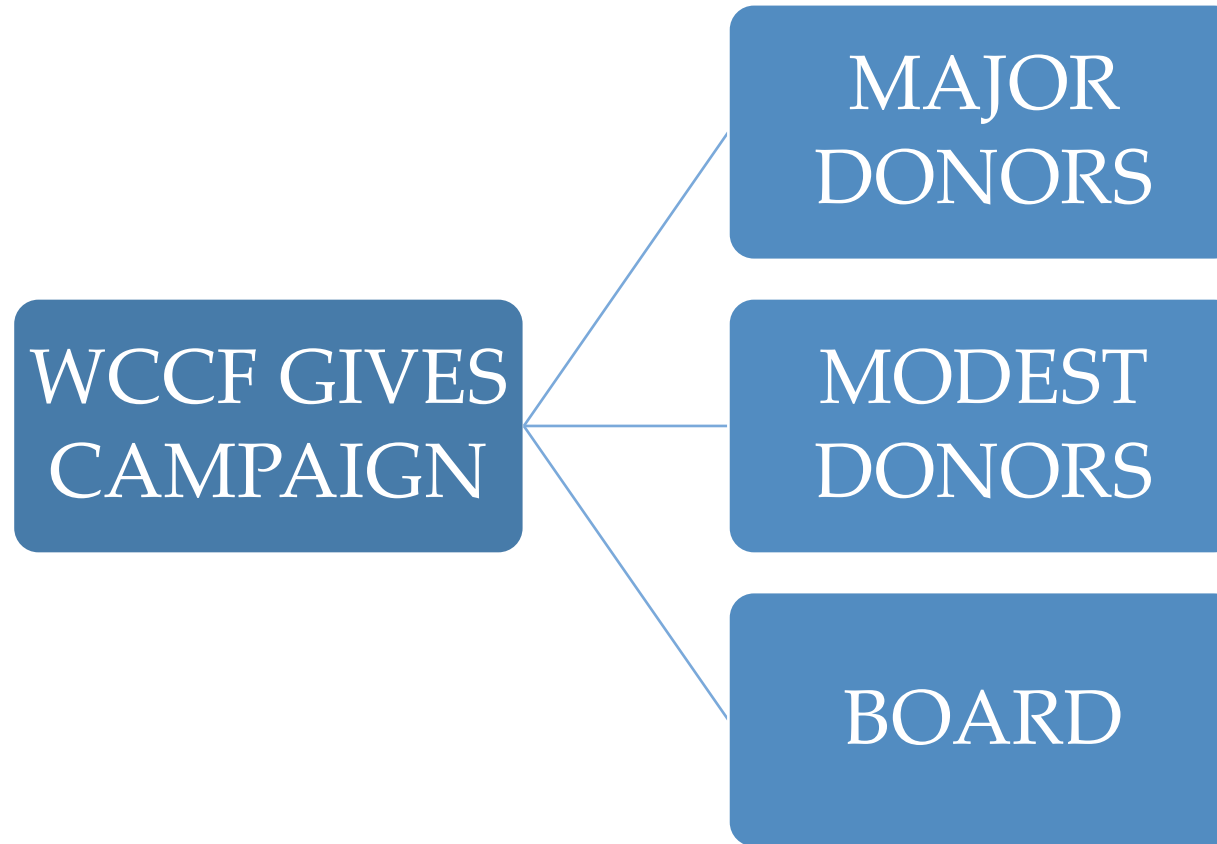


## *Get Your Board on Board Challenge (Cont.)*

- Charities with 100% board participation will receive one entry in the drawing for the \$5,000 *Acorn Fund* grant.
- The winner will be chosen at random using a software program in the Fourth Quarter.



# Driving the Development Train



# Driving the Development Train

## 1.) Map Your Route

- Create a timeline.
- Develop a strategy for each of your campaign subgroups. Use a combination of print, electronic, and personal solicitations.

## 2.) Put Your Plan into Motion

- Communicate your strategy to all those involved. Make instructions clear.
- Connect!





# Driving the Development Train

## 3.) **Keep the Momentum**

- Ensure your team and your plans stay on track.
- Report updates as needed.
- Follow-up.
- Fuel the Fire!



## 4.) **Arrive at Your Destination**



# Driving the Development Train

## You are the engineer!

*If you don't commit to driving the train . . .*

- 1.) The train will never leave the station.
- 2.) The train will fly off the rails.



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## Driving the Development Train

The #1 reason why people say that they didn't give to a charity is . . .

*“I was never asked.”*



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# WCCF Gives 2022



- Thursday, September 15
- 8 a.m. to 8 p.m.
- [www.wccfgives.org](http://www.wccfgives.org)
- Credit card donations may be made that day.
- Check donations must be **postmarked** by September 15.



# WCCF Gives 2022

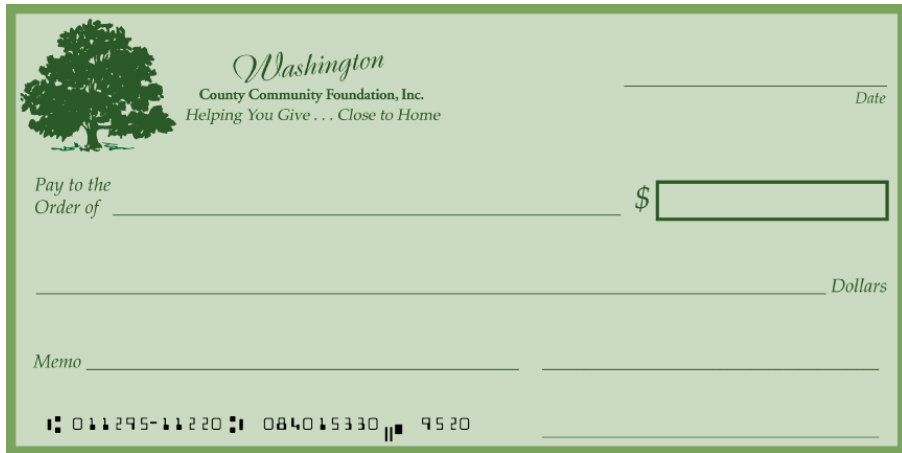


The WCCF will be covering up to \$50,000 in fees specifically related to credit card contributions, in addition to continuing to cover all other transactional fees.





# WCCF Gives 2022



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County Community Foundation, Inc.  
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Pay to the  
Order of \_\_\_\_\_ \$

\_\_\_\_\_ Dollars

Memo \_\_\_\_\_

011295-11220 084015330 9520

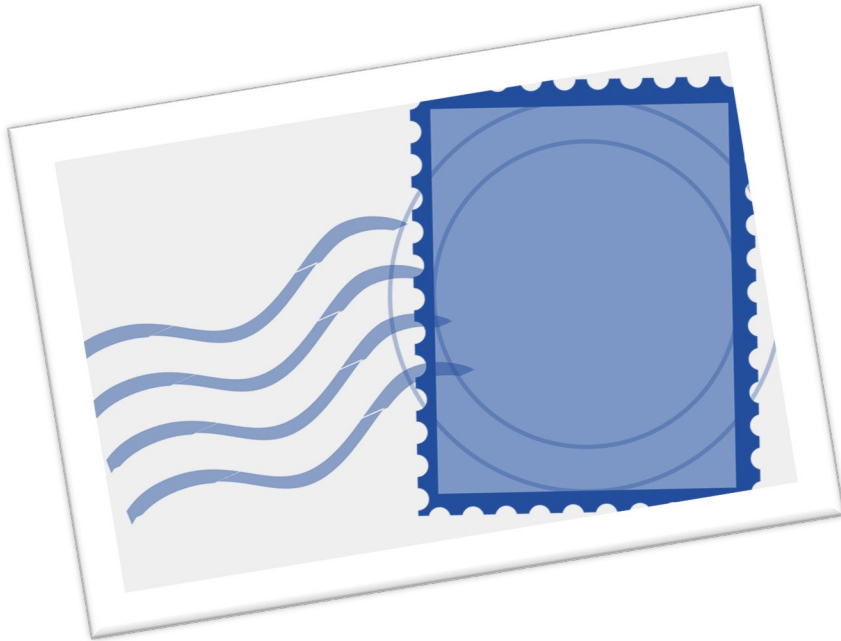
- The official *WCCF Gives* Check Contribution **Form** will be available by August 1.
- A completed form must accompany every check.
- Checks should be made payable to “WCCF.”
- Please do not encourage your donors to split their single gift into multiple checks.



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# WCCF Gives 2022



- Please ensure any checks collected at your charity's location are **postmarked** by September 15.
- Check contributions may not be hand-delivered to the WCCF office.
- No cash donations.



*Q.: Registration is closed. Why haven't you released the WCCF Gives Check Contribution Form?*



A: Although registration begins in March, many charities wait until the June 1 deadline to register for *Gives*. Then, it takes us weeks to resolve issues that surface during the review process.

- Mission Statement
- BCO Status
- Financials
- A Complete Copy of the Most Recent 990



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## *Best Practices: Streamlining Registration*



- Don't wait until the end of May to register.
- Know your charity's official mission statement and use it consistently.
- Register with the Bureau of Charitable Organizations (BCO) annually, even if you are not required to do so.
- Provide us with a complete copy of your most recent Form 990 (not just the first page).



## *Best Practices: Streamlining Registration (Cont.)*



- If you file a 990 Post Card, be prepared to provide year-end financial reports (Balance Sheet, P&L Statement) that align with the figures in your registration.
- Designate an appropriate *WCCF Gives* contact.
- Ensure the *WCCF Gives* contact has access to the required registration documentation.
- If we contact you regarding questions, please respond as quickly as reasonably possible.



## *Q.: Why aren't WCCF Gives grants processed until the Fourth Quarter?*



A: The Foundation receives approximately 5,000 individual donations through the day of giving. Each one is subject to a multi-step verification process.

Donors are receipted by the WCCF. Credit card donors are receipted virtually instantaneously, but receipts to check contributors must be issued manually.

Also, there is a limit on how much money can be processed from our bank account on a daily basis. So, it takes us multiple business days to process all the *WCCF Gives* grants.





## *Best Practices: Preparing Your Donors for Gives Day*



- Did you personally share the *Check Contribution Form* with your major givers?
- Did you connect with your donors who could/plan to give using their IRA?
- Do you have *Gives* day messaging on your website, social media pages, etc.?
- Are you planning a mailed solicitation for your traditional donors and an email solicitation for your credit card donors?



*Q.: Will there be any WCCF Gives Gatherings this year?*



A: We'll see! We hope to be able to resume these wonderful events, but the safety of all remains a top priority.

Announcements regarding any planned events will be communicated via email to your designated WCCF Gives contact.



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# WCCF Gives 2022



The Foundation sees *WCCF Gives* as a service to our local charities, which is why we are committed to hosting this event at **no cost** to you.

We thank you for your participation, promotion, and patience!



# WCCF GIVES SPONSORS



*Alex E. Paris Contracting*

*Observer Reporter*

*Washington Auto Mall*

*WCCF Acorn Fund*



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*Thank you!*



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