



Friends of Levitt Board & ED Affinity Group

Levitt Convening 2025



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About your facilitator

Jenny Carrillo, MA, CFRE
Tucson, Arizona
NonProfit Career 30+ years
20+ years in Consulting
BoardSource Certified
Governance Consultant

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Welcome & Introductions!

Name

Role

Venue

What was the first live music act you saw perform?

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Today's Goals



Increase understanding of the Board's purpose, function and best practices



Strengthen partnership between Executive Directors and Board Members



Identify ways to increase board engagement



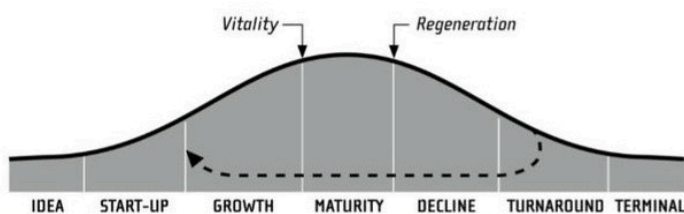
Develop understanding of the board's role in fundraising

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Context: NonProfit Lifecycles

Nonprofit Lifecycle Stages

Nonprofit Lifecycles: Stage-based Wisdom for Nonprofit Capacity



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Context: NonProfit Lifecycles



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BOARD JEOPARDY!

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Most Board Challenges Stem from:

- Poor understanding of roles
- Micromanagement or neglect
- Lack of partnership mindset
- Spending time on the wrong things
- Unproductive meetings
- Uneven participation or engagement
- Lack of candor

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Partners in Leadership Best Practices

Understanding difference between Governance and Management

Avoiding micromanagement or rubber-stamping

Focus on OUTCOMES not ACTIVITIES

Shared goal setting and clear performance measures

Annual evaluation

Regular, consistent meetings with Board Chair

Accountability to the WHOLE Board

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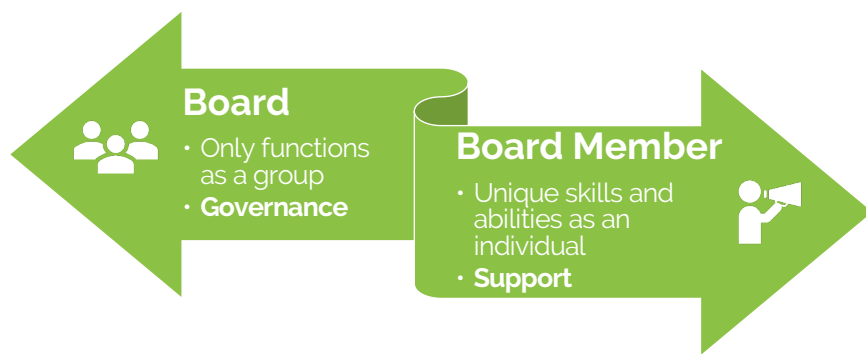
Trust, not control, is
the most effective
governance tool.

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Dual Roles ...



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... Multiple Hats



Governance



Support



Ambassador

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What is “engagement”

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Board engagement strategies



1. Have the right attitude
2. Bring on the right people
3. Tell them exactly what you want them to do
4. Organize and drive their work
5. Use positive reinforcement



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Fund Development

The process of building an ever-expanding pool of people giving their time, talent and treasure in support of an organization's mission.



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TRUTH!

A culture of philanthropy can not exist in an organization where people are

EMBARRASSED

by fundraising!



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Examine your beliefs

- What are your deeply held beliefs **about** money?
- What are your deeply held beliefs about people **with** money?
- What are your deeply held beliefs about people **without** money?
- What are your deepest **fears** about fundraising?



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Charitable Giving in the U.S



2023 Data

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Where do charitable gifts come from?



% INDIVIDUALS



% CORPORATIONS



% FOUNDATIONS

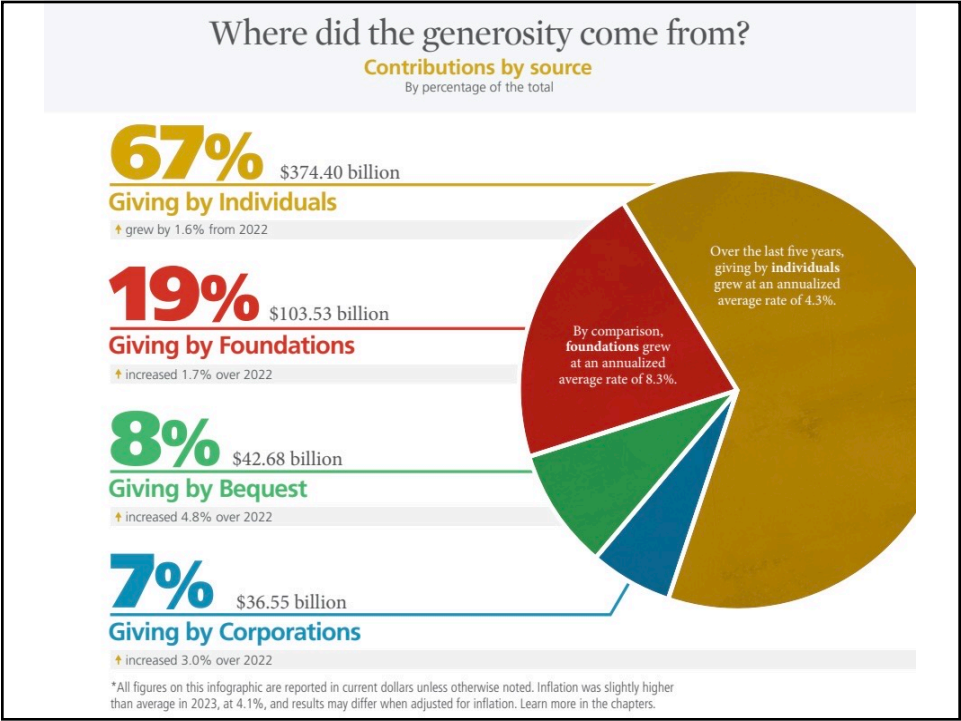


% BEQUESTS

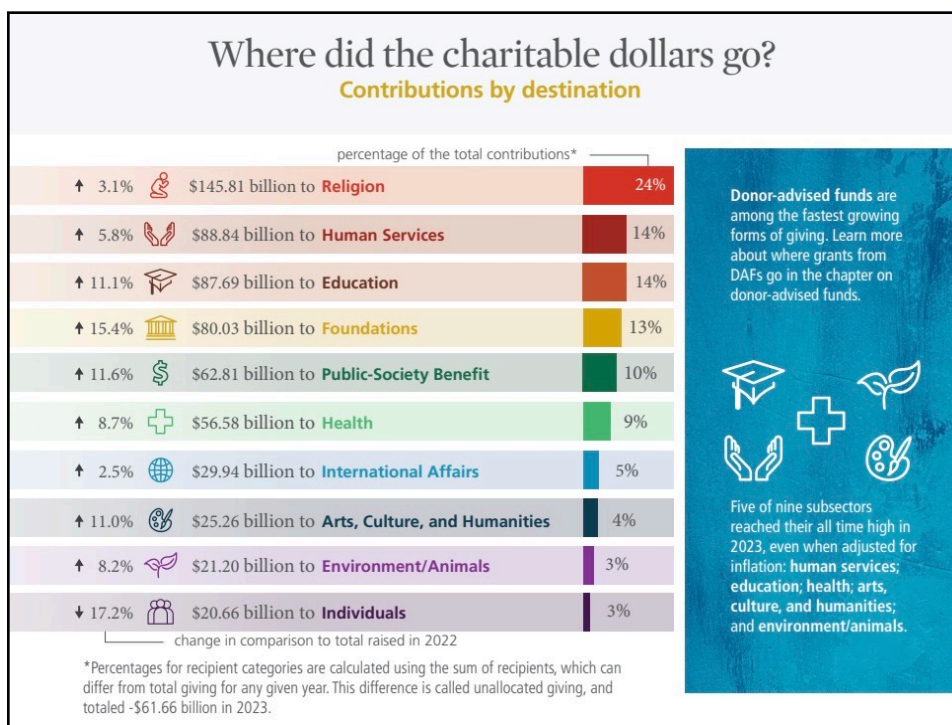


What's your guess?

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Donor Motivations

Altruism?

Guilt?

Salvation?

Anger?

Recognition?

Tax benefits?

SOMETHING ELSE?

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Donor Motivations

Someone asked!

Self Actualization:

I am the person I want to be ...
generous, compassionate,
self-less



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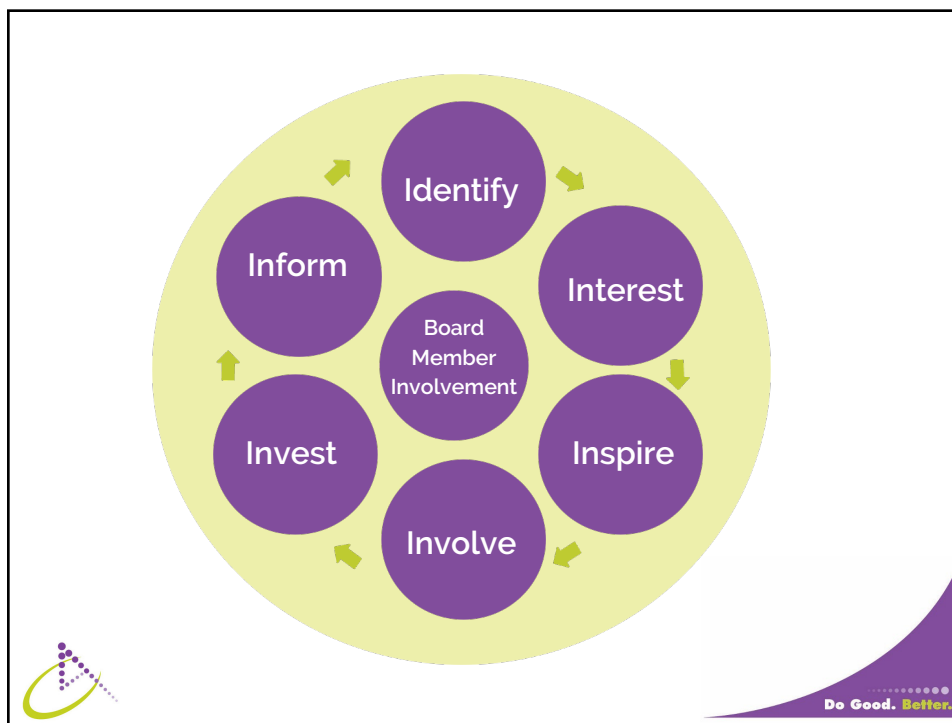
Trends

- Decreasing number of individuals giving
- Increase in "mega-gifts"
- Growth of Donor Advised Funds
- Fewer people itemizing their taxes
- Emphasis on Monthly giving
- Uptick in Foundation & Corporate giving
- Trust based philanthropy



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Stress Free Fundraising Strategies

- 10 Make your own meaningful gift first.
- 9 Write personal thank you notes.
- 8 Make 'thank you' phone calls.
- 7 Hand address appeal letters or event invitations and enclose a personal note.
- 6 Use 'Tables and Tees' strategically: personally invite and/or host prospects.



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MORE!





Stress Free Fundraising Strategies


- 5** Be an ambassador: share your story and passion for the mission.
- 4** Host a house party. Invite people to learn about the mission and impact.
- 3** Review list of donors to identify people you know.
- 2** Set up introduction meetings.
- 1** Accompany another board member or staff member on a donor visit.




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There's More!

-  Provide a list of 10 personal contacts who you think may be interested in the mission.
-  Brag! Share articles, annual reports, and other good news by social media, email, or mail.
-  Celebrate your own and other people's success!
-  What else?

 **PUT OTHER IDEAS IN THE CHAT!**



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The logo for Alexander | Carrillo CONSULTING. It features a stylized graphic on the left consisting of a green swoosh and a cluster of purple dots. To the right of the graphic, the text "Alexander | Carrillo" is in a bold, green, sans-serif font, followed by "CONSULTING" in a smaller, purple, all-caps sans-serif font. Below this, the tagline "Do Good. Better." is written in a green, sans-serif font.

Thank You & Good Luck!

Jenny Carrillo, MA, CFRE

www.do-good-better.com

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