



Note in the  
Pocket

# Fundraising Is for Everyone: Building Board Comfort and Confidence



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Development & External Relations Chair of the Board of  
Note in the Pocket

Board Fellow Duke Fuqua '26

10/16/2026



**Olivia Termini**

Board Fellow  
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## About me:



Studied **Classical and Environmental Studies** in undergrad at Dickinson College where she played Varsity Soccer



**Finance Director and Fundraising Lead** for Tom Brier's 2020 Congressional Campaign in Hershey, PA



**Fundraising Chair** for nonprofit Suited for Change while serving on the Board of Directors 2022-2024



**Board Member and Development and External Relations Chair** of Note in the Pocket



**Seasoned** management consultant

1



## Why fundraising feels hard

🕒 5 min

2



## Introducing the donor cycle

How fundraising is more than just direct solicitation

🕒 10 min

3



## Making fundraising FUN

Introducing the “Menu of Fundraising Options”

🕒 15 min

4



## Tailoring the menu

To a nonprofit’s fundraising year

🕒 8 min

5



## Accountability mechanisms

Without making your board dread fundraising

🕒 8 min

6



## Q&A

🕒 10 min

# Why Fundraising Feels Hard



## We equate fundraising with asking for money

The solicitation moment gets all the attention—even though it's only one part of the donor relationship.



## We don't want to feel transactional

Board members may worry that reaching out to friends, colleagues, or contacts will damage the relationship.



## Expectations are often vague

People are told to 'help fundraise' without a clear role, options, or understanding of what success looks like.



## One approach doesn't fit everyone

Different people bring different networks, strengths, and comfort levels—and fundraising should reflect that.



**The opportunity: Broaden the definition of fundraising.**

When people see the full donor cycle, there are many more ways to contribute.

# The Donor Cycle



Source: Thread Strategies



**Nonprofits need Board Member participation at every point across the Donor Cycle**



# The Board's Role in the Donor Cycle



Fundraising is a **team effort** that includes both staff and the Board. It is an **investment** and is **built over time.**

## Nonprofits need Boards to...

1



Help the NGO meet new people who can introduce us to new people, and grow our donor network

2



Steward the donors they already have through thank you calls and other engagement

3



Individually contribute or raise in line with the NGO's Give/Get Obligation

4



Ensure the NGO's fundraising plan is in line with NGO's overall strategic plan



The best fundraising is done organically through authentic connection, and NGOs need Board Members to help them make and steward those connections.

# The Board's Role in the Donor Cycle

It is important for those involved in NGO fundraising to make sure the Board...

1



**Knows their role  
in fundraising**

Leverage slide 6.

2



**Is comfortable  
participating**

Leverage Appendix slide exercise  
to start your journey with your  
board's comfortability with  
fundraising.

3



**Is supported in their  
fundraising journey**

What resources can you provide  
them to make things easier?



**Transparency from the NGO and Board is key!**

Normalize fundraising as part of the day-to-day conversation. Come up with a **collective fundraising goal**. Be in **constant communication** about the NGO's financial status.

# Introducing the Menu



## Why a Menu?

The Menu is designed to make it easy and FUN for Board members to participate in fundraising across the donor cycle.



Every year, each Board member will make their “plate” — an appetizer, main course, and dessert — and commit to completing those fundraising activities.



At the end of the year, we will celebrate the “clean plate club” of those who completed all their goals.



*The Board should update the menu annually based on evolving fundraising priorities and changes in strategy.*



## A "Menu" of Board Fundraising Contributions

### **Appetizer: A warm-up fundraising activity designed to get your feet wet**

- Add NITP Board member to your signature, including recording a video and linking it to your signature
- Introduce the company you work for to Note and ask if they match volunteer time or money, if they know we volunteer programs/ that we could bring Note to them in-house, and if they would sponsor pop ups
- Host clothing drives at an existing party, e.g., Football/sports themed. Reach out to Carole Trone [Carole@noteinthepocket.org](mailto:Carole@noteinthepocket.org) if interested
- Add an underwear drive to an existing kid's event
- Create a team for the NITP Socks and Undie 5K Rundie
- Asking and facilitating your friend to become a Fairy Godmother
- Donate your own and family's clothing, encourage your neighbors to do the same!

### **Main Course: A more involved fundraising activity, the “meat” of our efforts**

- Host Giving Shoes-day Fundraising Page, with at least a goal of \$500
- Host a Pocket Party Grassroots Fundraiser event and invite friends
- Help your friend host a Grassroots Fundraiser event
- Become a spokesperson for NITP to promote 5K sponsorships, MVP, TCS, Faith Partner program, etc. Track your commitments/ progress on the Board Shared FUNraising spreadsheet and with Nancy Bono [nancybono@noteinthepocket.org](mailto:nancybono@noteinthepocket.org)

### **Dessert: A 'nice to have' fundraising activity that serves as the “cherry on top”**

- Go with staff to meet with individual, corporate and/or grantor contacts
- Brainstorm ways of involving new individual and corporate contacts
- Complete more than your share of weekly donor calls or thank you notes
- Host a Pocket Tree or Menorah at your company each holiday season
- Nominate someone for the Community Board or encourage someone to apply to the teen board



# FUN-draising can be FUN

## Breaking Down the Menu



### Appetizer

A warm-up fundraising activity designed to get your feet wet.



### Main Course

A more involved fundraising activity; the “meat of our efforts.”



### Dessert

A ‘nice to have’ fundraising activity that serves as the “cherry on top.”



**A mix of appetizers, main courses, and desserts** creates a balanced and sustainable fundraising year.



# The Menu: Sample Plate

## An Example 'Plate'

Every year, each Board member will make their “plate” – an appetizer, main course, and dessert – and commit to completing those fundraising activities.

### A "Menu" of Board Fundraising Contributions

**Appetizer:** A warm-up fundraising activity designed to get your feet wet

- Add NITP Board member to your signature, including recording a video and linking it to your signature
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### APPETIZER

A warm-up fundraising activity designed to get your feet wet

- ✓ Add “Proud Note in the Pocket Board Member” to your email signature
- ✓ Introduce your company to Note and explore matching programs or sponsorships
- ✓ Host a clothing drive at an existing party or event
- ✓ Add an underwear drive to an existing kid's event



### MAIN COURSE

A more involved fundraising activity, the “meat” of our efforts

- ✓ Host a Giving Shoes-day fundraising page (goal of \$500+)
- ✓ Host a Pocket Party grassroots event and invite friends
- ✓ Help a friend host a grassroots fundraiser event
- ✓ Become a spokesperson for Note to promote 5K sponsorships, MVP, TCS, Faith Partner program, etc.



### DESSERT

A ‘nice to have’ fundraising activity that serves as the “cherry on top”

- ✓ Go with staff to meet with individual, corporate and/or grantor contacts
- ✓ Brainstorm ways of involving new individual and corporate contacts
- ✓ Host a Pocket Tree or Menorah at your company each holiday season
- ✓ Nominate someone for the Community Board or encourage someone to apply to the teen board



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*The Board should update the menu annually based on evolving fundraising priorities and changes in strategy.*

# Fundraising 101 Tips

1



## People give to people more than they give to causes.

People may not know about your NGO, but they know about YOU! They'll want to help when you ask genuinely and in a way that makes sense to their relationship with you.

2



## "No" or "Not at this time" is totally fine!

You will never know if you do not ask—especially if you do not ask directly. A "no" is not a personal rejection; it's simply part of the process.

3



## The money you raise is not for personal gain.

It's for a cause that is important and needs resources to continue achieving its mission. You are helping create a meaningful impact in your community.

4



## This can be fun and a way to be creative!

Think beyond the traditional ask: Can you host a FUN-draising event with a party you already planned? Ask a friend to host with you? Write down your "why" for being involved and share that with your contacts!



# Understanding your NGO's Fundraising Year



## START WITH THE YEAR

You cannot craft a good plan to involve your board in fundraising without an understanding of your nonprofits fundraising year – typically a fundraising strategy is written year by year.



## READ THE SIGNALS

What is your NGO's revenue by percentage? Expenses? Any earned revenue? What is the cost you spend on events or campaigns to raise a dollar. What is your largest revenue driver? Individual giving grants? Individual Giving is historically on the rise.

## A YEAR TO REVIEW, PLAN, AND ADAPT

1

### MAP



Revenue - expenses - earned revenue



2

### DIAGNOSE



Cost to raise a dollar - largest revenue driver



3

### DIVERSIFY



Individual giving trends - other funding sources

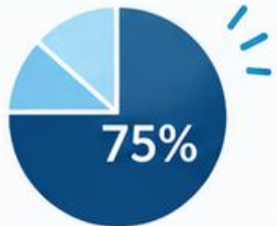


4

### ADAPT



No one report or webinar can tell you the future



## THE FUNDING LANDSCAPE KEEPS MOVING

Giving USA reports that individual giving is still the largest source of philanthropic revenue at 75% overall (67% individual, 8% bequests). However, individual household participation in philanthropy is decreasing. In 2018, the percentage of American households giving dropped below 50% for the first time.



These larger trends show a need for diverse funding strategies. In addition to macroeconomic trends that negatively affect individual giving, other sources of funding (such as government) can be unreliable. There are a lot of changes occurring and no one report or webinar can tell you the future.



How do the Board requirements, i.e. Give get policies play into it?



# Accountability Mechanisms

1



## Sign-up sheet

Create a shared 'Menu' of FUN-draising actions and revisit it at board meetings.

2



## Leaderboards

Use friendly fundraising leaderboards to spark momentum.

3



## Quarterly scorecard

Track metrics like number of people contacted and amount raised by person or group.

4



## FUN-draising buddy

Pair board members or staff to brainstorm ideas, practice the pitch, and stay on track.

5



## Awards & recognition

Celebrate participation with awards like Board FUN-draiser of the Year.

Without accountability, nothing happens! Clear ownership and buy-in is key.

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**Thank  
you!**

**Q&A**

## Group Mock FUN-draising Activity (20 min)

**1**  Break into small groups of 2–3 people.

**2**  Choose **one of the three scenarios** to practice (or any item on the menu!).

### PICK A SCENARIO



#### 1. Make an Ask

Ask someone for an end-of-year donation.



#### 2. Invite to an Event

Invite someone to attend a fundraising event for your NGO.



#### 3. Recruit a Host

Ask a good friend to host a fundraising event for your NGO to reach a new audience.



#### Decide roles within your group.

One person is the fundraiser and the other is the potential donor/supporter.



#### Practice the conversation.

If you have time, switch roles.



#### Reconvene and reflect.

- What went well?
- What could have been improved?
- How did the conversation feel overall?