

## Board Fundraising: Setting the Stage for Success

**Give, get or get off!** Those famous five words...

But while we've all heard them, how, exactly, do we get our boards to live them?

The answer lies in the complex relationship between board oversight and management – and in the especially tricky area in which you absolutely want board members providing not only oversight but active and hands-on implementation support – fundraising.

And therein lies the rub. How can we hold board members at arms-length when it comes to program development, financial management, human resources – all those areas in which boards are supposed to set policy and let staff manage implementation – and yet ask board members to step up to the plate and actually do the work of fundraising?

The answer is... thoughtfully, with plenty of encouragement, in partnership with staff, and only once the board is convinced of the absolute necessity of shouldering that responsibility.

The trouble is, oftentimes our agencies have lumbered along for years with minimal board fundraising. Then, all of a sudden (or so it seems to board members), they're being asked to do more – and in an activity (asking for money) that's not for the faint of heart. You can't blame board members in this situation for secretly feeling that this is all some "best practices" plot and

**"The one area in which you absolutely want board members providing active and hands-on implementation and support is fundraising."**

that if they just keep doing what they've always done, the agency will keep performing as well as it always has – without their fundraising effort.

So the first job in building board fundraising engagement is to make the case for change. Not the case for why the agency is deserving of support, but the case as to why a board stance of passively supporting staff fundraising isn't good enough anymore.

These days, it isn't very hard to make that case.

But if it's due to a crisis or an opportunity, someone on your board (or, better yet, a few members) needs to be convinced of the absolute necessity of raising the board's profile in this arena.

And that the executive director isn't, once again, going to be able to pull this rabbit out of the hat – all by herself.

Interestingly enough, the person on your board who sees that board fundraising action is imperative, doesn't have to be your board chair. It's great if it is, but realistically, if your board has been asleep at the wheel for a long time it's unlikely that the person presiding over that trance is going to be the one leading your board out of it. Many times, new board members with fresh energy can be enlisted to lead the charge, and it's even better if you can pair that person with a long-serving board member to give the effort some clout.

Now's where the fun begins. (Yes we meant that!)

While some board members understand the mechanics of fundraising (because they work at nonprofits or have served on high-performing boards), many board members who are new to fundraising have an extraordinarily naïve concept of how fundraising works. The very idea of donor cultivation is foreign, resulting in “Donald Trump has lots of money, let's ask him for a \$1 million grant” conversations; the relationship of fundraising costs to dollars raised is oblique, leading to discussions along the lines of “Let's rent the Rockefeller Center Ice Skating Rink and have a \$10/per-person ice-skating party”; and the rationale for sponsor motivation is vague, resulting in brainstorming like “Let's get Bruce Springsteen to give a concert for us since he sings about working people and we run a workforce development program.”

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Yet you don't want to squash board members' newfound enthusiasm.

The answer is a board fundraising plan – a coordinated sequence of activities that board members engage in over time (preferably coinciding with your fiscal year) which encompasses donor identification, cultivation, multiple solicitation methods matched to varied gift sizes, and donor recognition. You may need to include some board training as part of this plan – that saves you, the chief executive, from serving in the position of chief staff naysayer.

A good consultant will be able to harness your board's energy to practical activities that are well-designed for success, and will also help address your board members' unstated fears (we all have them). If you have professional development staff, the chief development officer may be able to support board members in this role, but as we all know, “a prophet is without honor in his own country.” In other words, when dealing with something that board members don't really want to do (and how many of us do, actually?), they'll be less likely to discount the advice of an “outside expert.” At Cause Effective, we've had decades of experience cajoling reluctant board members into fundraising readiness, and we've got a few tricks up our sleeves on how to do so. Any reputable consultant dealing with board fundraising engagement should have as well.

The key to this process is your board fundraising committee. This is the inner circle of board fundraising – the group of folks who’re responsible for steering your board along this path. These people are not the only ones doing fundraising on your board, but they are the ones responsible for monitoring and inspiring the rest of the board to pitch in. The chair of this committee is the most important person in getting your board to actively fundraise, so choose someone with energy to spare, who’s well-respected by other board members – and fearless.

The fact is, board members can clue in to the fundraising process at many levels. Involving board members in donor cultivation can actually be a great way to refresh your own board members’ knowledge of your agency. For example, what about asking board members to host a dinner for friends after attending a workforce training program graduation? That way they can combine social and organizational purposes, bringing in donor prospects (i.e. friends) to experience your program at its best (when it “sells itself”). That feels like friendraising, not fundraising – but the secret of fundraising is that it is, indeed, friendraising at heart.

You will probably need to include some opportunities for board practice in your plan – practice asking for the gift, but also practice talking about the agency, explaining its vision, its impact, and its needs. One of the frequently-unstated reasons board members aren’t out there aggressively friendraising for your agency is because, quite literally, they don’t know what to say. It can be very helpful to create talking points for them. While board members often feel they have to be experts – that’s why they were recruited onto the board, right? – they feel remarkably, and uncomfortably, like neophytes with regard to the agency’s program areas. They’re usually quite grateful to be given a few tools to ease their learning curve.

If you fill your board fundraising plan with simple, do-able activities, provide plenty of opportunities for board members to practice the fundamental steps of fundraising year-round (i.e.

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not just at one big shindig per year), and offer lots of group support (how about scheduling a repeating board meeting agenda item recognizing board member fundraising efforts?), you should find some – probably not all, but over time, a majority – of your board members will start to find their fundraising home ground.

That doesn’t mean that everyone will be capable of making \$10,000 asks; but it does mean that everyone should be able to find a level appropriate to their connections and personal disposition. Sure,

every group has some long-time fundraising grouches – board members who’ve served for years without being expected to raise money, and who aren’t going to move in that direction; but over time the bulk of your board will move into compliance and start to self-monitor its performance in this area.

A word about staff support... Many chief executives have the (unrealistic) fantasy that once their boards start to fundraise, they'll do it on their own and just report their "winnings" back to staff. Sorry, it doesn't happen like that.

No matter their good intentions, board members have lives that interfere with their board service. They promise to make a few calls, then they get home and find out that their kid's failing Spanish class. Or their dog's arthritis is acting up. Or their elderly parent's caregiver quits. You get the picture. They're on loan to your organization, and once they leave your premises, life happens to them. Yet the very premise of board service is that board members have access far beyond the staff. We need that access – so how do we help them to help us?

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By partnering with them.

To get consistent fundraising action from board members, try managing up. Master the skill of nudging, not nagging. Weigh what you ask of them so they're not treated as just another pair of hands. Provide them with the materials (printed matter, talking points, pre-meeting briefings) they need to do the job successfully. And don't forget the best management tool of all – praise for a job well-done (or wholeheartedly attempted).

Fundraising is a tough job, with plenty of opportunity for rejection. The more you can set your board members up for success, the more they'll actually achieve.

## SAMPLE - Board Fundraising Plan

NOTE: All OCC (Our Community Center) Board Members are expected to participate actively in OCC fundraising appropriate to their contacts, skills and ability. OCC asks that each board member fill out the attached board member fundraising commitment sheet indicating which activities they select as their primary fundraising focus. In addition, every board member is expected to make an annual personal financial contribution in an amount that is personally significant.

### OCC Board Fundraising Goal for FY 2012

- Raise \$60,000 from individuals
  - 4 Gifts of \$2,500 - \$1,000
  - 12 Gifts of \$500 - \$150
  - 200 Gifts of \$100 - \$10
- Expand the number and different kinds of strategies through which people are introduced to OCC
- Build exposure to and interest of new donor markets for OCC
- Expand the number of Board members and others who are engaged in fundraising for OCC
- Increase OCC's Board member comfort and skill with fundraising
- Build a repeatable "ladder" of involvement for building relationships with potential donors

### PRIMARY MARKETS (who the board will approach for support)

- Board and Board Contacts
- Members and their friends/families
- Alumni of our youth program
- Annual Event-Goers
- Honorees and former honorees
- Neighborhood Residents
- Local Small Business Owners

### ACTIVITIES (what the board will do to identify/cultivate/solicit/recognize supporters)

#### Communications

- Board Communications (need to be more frequent with less duplication) – board members need to think about being conduits for information about OCC to the outside world (by forwarding newsletters, updates)
  - E-updates – circulate two to three paragraph briefs on "something that came up" (written by the executive director) – every two months
  - Sending out two newsletters per year
- Alumni Council – special page on website, FaceBook page, and social media campaign
- Talking points will be prepared by staff to help board members and staff be "on the same page"

#### Cultivation Opportunities

- Programs – use for cultivation
  - Workforce Training program milestones – esp. graduation services
  - Afterschool and parent workshops
  - Community celebrations (holiday party, other community events)
- Staff will prepare a calendar of activities so that board members have enough advance notice to utilize these activities for cultivation purposes
- Board training will be conducted to encourage board members to have their OCC hat on as they walk through their personal and professional lives

#### Direct Solicitations

- Mail Appeal(s) – one per year for now, perhaps two if can work around annual event timing in future years
  - OCC board members will be expected to provide OCC with the names and addresses of 5-15 individuals who might make a contribution through our annual mail appeal
  - OCC board members are asked to write notes to their contacts on their letters and conduct follow-up calls/emails to their contacts

- OCC board member participation in phone follow-up to the agency's contacts (phone-a-thon) is also appreciated
- Major donor appeals – we will target people from the current donor base and start to cultivate them
  - OCC board members are asked to identify likely major donors from their own contacts as well as participate in cultivating, soliciting and recognizing OCC-connected donor prospects

## **Events**

- House Parties – OCC has ready-made materials (“house-party-kit”) ready for hosts, with customizable implementation schemas, and we will pair board/non-board member hosts (1-2 per year)
  - Board members are asked to host or co-host a house party
- Holiday Party – celebratory but also fundraising component – add an ask to the invite
  - Objectives: cultivator; engaging new people in the neighborhood; provide recognition; increase the number of askers/fundraisers
- Annual Event
  - We need to form an event steering team which includes staff, board and friends
  - This group will set objectives, look at audiences, markets, who we want there and why; and put in place the framework for the event (i.e. honorees, co-chairs, committee members, fundraising expectations and support for each)
  - Board members will be expected to participate in event-related fundraising in a number of ways (securing Journal greetings and silent auction items, soliciting sponsorships, selling tables/tickets, attending, and bringing people who might become OCC donors in the future)

## **CALENDAR**

### January

Planning Process begins for Fall Fundraising benefit  
 Invite donor prospects to February Workforce Training Program(WTP) graduation

### February

- Guest Lists developed for House Party
- Attend WTP graduation and bring two guests

### March

- Invite people to house party
- Follow-up on house party invitations
- Participate in selected major donor updates (mail, phone)

### April

- Co-host and/or attend house party

### May

- Give in names for and write notes on newsletter mailing
- Invite people to be on committee for Fall Fundraising Benefit
- Invite people to and attend afterschool showcase

### June

- Give ideas in and help to solicit sponsorships for the Fall Fundraising Benefit
- Participate in selected major donor updates (mail, phone)

### July

- Help to identify and solicit sponsorships for the Fall Fundraising Benefit

### August

- Participate in selected major donor updates (mail, phone)
- Continue to identify and help to solicit sponsorships for the Fall Fundraising Benefit
- Invite people to and attend family picnic

### September

- Invite people to the Fall Fundraising Benefit
- Follow-up invitations by phone
- Invite people to and attend afterschool tutoring kickoff

### October

- Attend the Fall Fundraising Benefit
- Participate in event debrief

### November

- Give in names for and write notes on newsletter mailing
- Participate in selected major donor updates (mail, phone)

### December

- Give in names for and write notes on solicitation mailing
- Invite select prospects to annual Holiday party (cultivation)

### In an ongoing manner in all months,

#### Board members will be asked to:

- Identify major donors (as appropriate)
- Initiate and/or attend selected major donor visits (as appropriate)

## **SAMPLE - Fundraising Options For Board Members**

### **Donor Identification**

Provide your organization with the names and addresses of at least five individuals who might make a financial contribution.

Participate in an ad hoc meeting to identify and evaluate prospects.

Carry with you and use business cards which identify you as a board member of your organization. Talk about the organization at cocktail parties!

### **Donor Cultivation**

Host a lunch at work or a brunch to introduce friends, colleagues and family members to your organization's work.

Attend your organization's program functions, serve as an informed host and bring guests.

### **Solicitation**

Write personal letters and make follow-up phone calls to ask your contacts to join you in supporting your organization.

Be part of an asking team.

Recruit people who can provide pro bono expertise or in-kind assistance

Request the donation to your organization of at least one item from a store at which you do business.

Sell tickets and journal ads for your organization's fundraisers.

### **Recognition**

Write thank you notes.

Call donors to thank them on behalf of the organization.



## SAMPLE - Board Member Fundraising Commitment

Between now and 6/30/12,

I, \_\_\_\_\_ commit to the following fundraising activities:

\_\_\_\_\_ Directly (1-1) asking \_\_\_\_\_ (#) individuals for significant contributions  
(range of \$\_\_\_\_\_ to \$\_\_\_\_\_).

- I will ask \_\_\_\_\_ (#) of these prospects from my own circle of acquaintances.
- I will ask \_\_\_\_\_ (#) of these prospects from a list supplied to me.

\_\_\_\_\_ Sending out \_\_\_\_\_ (#) solicitation letters to my own personal contacts, including writing personal notes on all, and following up by phone with \_\_\_\_\_ (#) letters per mailing.

\_\_\_\_\_ Making thank you phone calls to donors as requested.

\_\_\_\_\_ Hosting/Co-hosting (circle one)

\_\_\_\_\_ (#) of house parties at my home/at someone else's home (circle one).

I will invite \_\_\_\_\_ (#) of people with the intent of getting \_\_\_\_\_ (#) people to actually attend.

\_\_\_\_\_ Targeting \_\_\_\_\_ (#) personal friends/colleagues who might be interested in the agency if they knew more about it. How can we get them more involved? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_ Securing \_\_\_\_\_ (#) Journal Greetings and \_\_\_\_\_ (#) auction items for our annual event.

\_\_\_\_\_ Soliciting \_\_\_\_\_ (#) event sponsorships, and selling \_\_\_\_\_ (#) tables and \_\_\_\_\_ (#) tickets to the event.

\_\_\_\_\_ Spearheading the Alumni Council, including recruiting \_\_\_\_\_ (#) new members and developing and implementing strategies to stay in touch with existing members and get the most out of them.

\_\_\_\_\_ Sending out \_\_\_\_\_ (#) newsletters with a personal note (twice a year).

\_\_\_\_\_ Helping to write and produce the newsletter, press releases, and other publicity materials.

I am comfortable setting the following dollar goal for myself to raise: \_\_\_\_\_.

**I will need the following types of staff support for these activities:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**I UNDERSTAND THAT I AM ALSO EXPECTED TO GIVE AN ANNUAL PERSONAL DONATION OF AN AMOUNT THAT IS, FOR ME, A SUBSTANTIAL AND MEANINGFUL CONTRIBUTION.**