

## Board Fundraising: Setting the Stage for Success



*Judy Levine, Executive Director, Cause Effective*

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?

Last month's New York Nonprofit Press talked about the relationship between oversight and management. This month we're going to talk about the one area in which you absolutely want board members providing active and hands-on implementation support - fundraising.

Therein lies the rub.

How can we hold board members at arms-length when it comes to program development, financial management and human resources - areas where boards are supposed to set policy but let staff manage implementation - and yet ask them to step up 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.

Often, 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 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 why a board stance of passively supporting staff fundraising simply isn't good enough anymore.

This could mean citing a trend analysis of decreasing government support, or a changing corporate climate, or even a new venture that needs to be internally funded to start - capital campaigns are famous for waking slumbering boards to the need to amend their ways. Whatever it is, someone on your board (or, better yet, a few members) must be convinced of the absolute necessity of raising the board's profile in this arena.

Interestingly enough, that someone 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, the fun begins.

While some board members understand the mechanics of fundraising (because they work at nonprofits or have served on high-performing boards); others may have an extraordinarily naïve concept of how fundraising works. The very idea of donor cultivation is foreign: "Donald Trump has lots of money, let's ask him for a \$1 million grant". The relationship of fundraising costs to net proceeds is oblique: "Let's rent the Rockefeller Center Ice Skating Rink and have a \$10 per-person, skating party". The rationale for sponsor motivation is vague: "Let's get Bruce Springsteen to give a concert. He sings about working people and we do workforce development."

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.

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A good consultant will be able to harness your board's energy to practical activities while also addressing their unstated fears (we all have them). If you have professional development staff, they may be able to support board members in this role. But, as we all know, "a prophet is without honor in his own country." Board members, who don't really want to do what you are asking, will 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. So will any other reputable consultant dealing with board fundraising engagement.

The key to this process is your board's fundraising committee. This is the inner circle of board fundraising - the group of folks who are responsible for steering your board along this path. They

won't be the only ones doing fundraising, 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.

Board members can clue in to the fundraising process at many levels. Involving board members in donor cultivation can be a great way to refresh their own knowledge of your agency. For example, ask board members to host a dinner for friends after attending a workforce training graduation? 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.

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Your plan will need to include some opportunities for board practice - practice in both asking for the gift and 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 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 may be experts in management and governance, they often feel remarkably, and uncomfortably, like neophytes when it comes to programs. Usually, they are quite grateful for tools to ease the 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. 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 start now. 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 back their "winnings". 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 get home and find that their kid's failing Spanish class or the dog's arthritis is acting up. 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? 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.

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