

How Board Members Can Become Effective Fund-Raisers

So, you've been asked to join the board of a non-profit organization, or maybe you're already on the board. In either case, here's some advice.

Never sit on the board of a non-profit organization unless you are willing to express your leadership by asking friends, family, and acquaintances to make gifts of a size consistent with their ability to give. Board members must be eager solicitors of donors, especially those with the ability to make substantial gifts, and they must be willing to lead fund-raising efforts.

In the end, the success of fund-raising campaigns hinges on leadership, and that leadership starts with the board. Board members are the campaign solicitors of first and last resort. They are the most important fund-raising resource an organization has. There is no greater strength in a fund-raising campaign than a board ready and willing to lead, and no greater weakness than one which sees fund-raising as someone else's job.

Yet far too many board members are, at best, reluctant fund-raisers. They're quick to claim they don't have the time, feel uncomfortable "begging," don't have the right contacts, or didn't sign on to be fund-raisers—that it's the staff's job. Does that mean we have the wrong people on our boards? Would things be any different with different board members? The answer to both those questions is a resounding NO!

Board Members Must Be Provided

With The Fund-Raising "Road Map"

From my experience, much of the fault lies in an organization's failure to define and delineate for board members their fund-raising role. Board members need to be made aware of the fund-raising process and to be provided with the plans, tools, and support necessary for effective solicitation.

The first step to a fund-raising-friendly board is to make the responsibility to solicit gifts clear at the time a person is asked to serve. Too often, the commitments and responsibilities of board membership are glossed over out of fear that a candidate will say no. I doubt most of the people who try to "seduce" an individual onto a board by stressing how little will be required of them would use the same approach if they were hiring someone for a job.

The second step is to assure board candidates that the organization will provide them with all the tools and assistance needed to raise money and that fellow board members are committed fund-raisers for the organization. The person recruiting a new board member should be either the board chair or a board member who has a personal relationship with the candidate. Recruiters must step forward with their endorsement of the organization's fund-raising policies and practices, explain why they believe in them, and tell how they personally have solicited gifts for the organization.

The Two Strongest Tools Board Members Must Have

If board members are to raise money, they need to know and be committed to the organization. Knowledge and commitment are the two strongest tools anyone asking for a gift can have, and they go hand in hand. Knowing the organization is crucial to fund-raising, but without commitment that knowledge is worthless. Words spoken in support of a cause in which you do not believe have a hollow ring to them. Without knowledge you can't present an organization's case to prospective donors, and without true commitment your efforts will yield severely diminished results.

Commitment is something that can be determined in the recruitment process and then built upon as an individual serves. Yes, sometimes people will seem to have commitment that they don't. But most of the time we can tell who really cares. Knowledge of the organization is something that can and should be imparted to board members throughout their tenure. An organization needs more than the obligatory orientation session for board members. An ongoing process of board education and awareness-building is needed.

Board Members Must Know Their Organization

Nothing inhibits face-to-face solicitation more than not knowing your organization well enough to answer detailed questions about it. An unknowledgeable solicitor is an unsure and uncomfortable solicitor. You can't do a good job at communicating an organization's need or importance if you don't know the organization.

You need to know its reason for being, its goals and objectives, who benefits from it, and its operational and financial efficiencies. If you have that knowledge, you have an understanding of the organization's importance and its necessity. That understanding will give you the confidence and composure to pick up the telephone, to knock on a door, and ultimately to sit in someone's office or living room and ask for money.

Board Members Must Be

The First To Step Forward To Raise The Money

Soliciting major gifts is only one part of a board member's fund-raising responsibility. Board leadership is the key element in deciding if a campaign should be undertaken and then in determining the goal. As a board member, you must be prepared to serve on the board's standing committee on development and to play leadership roles on individual campaign committees.

The best board members raise their hands for the jobs most critical to the success of an organization, and no board responsibility is more crucial than that of fund-raising. If you're new to a board there is no faster way to contribute than to ask to serve on the development committee. You'll earn the respect of fellow board members and have the opportunity to develop meaningful relationships with the organization's executive director, its development director, and influential board members already serving on the committee.

By actively working to raise the contributed income necessary to carry out the organization's mission you will have leveraged your involvement with the organization. Every hour you give to it will carry meaning and deliver outcome.

The Development Committee:

Every Board Should Have One

What kind of people should be on a development committee: those with both the vision to see the big picture and the focus to concentrate on what needs to be done today. A development committee needs people of varying backgrounds, but I have found the best committee chairs share some common traits. They are skilled managers and have strong marketing backgrounds. They are able to lead, and they have clout in the community. As the staff development professional, I found I could supply the nuts-and-bolts "how-to." Then my committee chairperson would pull together a cadre of volunteers who could be relied on to deliver results. Recruiting other volunteers is an important part of what a development committee chair needs to be able to do.

If you recognize yourself in the forgoing description, you really need to raise your hand to serve on your organizations development committee and then be ready to take a position of leadership. Do so, and you will give the organization what it needs most while at the same time showing yourself to be a community leader.

Let's suppose for a moment that you are a board member who is already committed to carrying out your fund-raising responsibilities and have risen to a position of leadership in the organization's development effort. How then can you help bring other board members and volunteers into the fold? You do it by overcoming their objections to and fear of asking for money.

Overcoming The Board's Fund-Raising

Fears, Objections—and Excuses

Regardless of the excuses given, there are positive steps you and the organization can take to reverse the most negative and defensive attitudes.

1. Educate them on fund-raising with workshops, retreats, etc. Knowing the process of fund-raising helps diminish fear of it.
2. Help them reinforce their belief in the value of the organization's mission by sharing its success with them and encouraging them to involve themselves in its programs. True belief in a cause can turn almost anyone into an effective fund-raiser.
3. Assign tasks that involve them in a fund-raising campaign, but that do not require them to solicit gifts. These can include rating prospects, adding personal endorsements to funding requests, and writing thank-you notes to donors. It's a question of learning to crawl before you can walk.
4. Place them in a position to be visibly associated with the organization and its successes. Ask a board member to be an interviewee in a story the local newspaper is doing on the organization or one of its programs. Let them bask in the organization's success. We all like to associate ourselves with winning efforts.
5. Partner a board member who is a successful fund-raiser with a new recruit as a mentor. Have the new member accompany the successful fund-raiser on visits to a donor or two. Nothing beats the experience of being where the action is and watching a pro at work.

6. Create opportunities for board members and volunteers to experience the organization. They will gain a true appreciation for the organization from the up-close and personal view provide by visits to its facilities, events where they can watch the organization at work, and seeing how real people benefit from the organization. The best way to learn about something is to immerse yourself in it.

Try these approaches and you will increase greatly the willingness of board members and volunteers to solicit gifts. Increase that willingness and you will raise the board's fund-raising effectiveness.

Board Members Must Avoid Major Solicitation Errors

Earlier I said that as a staff development officer I found that I could provide my committee chair and by extension, other board members and volunteers, with the nuts-and-bolts know-how of fund-raising. If you are a board member, make sure that you avail yourself of the skill, knowledge, and experience of the pros you have on staff. Those of us who have been working at this fund-raising game over the years have learned many of the dos and don'ts of successful solicitation. Some of the things that doom a solicitation effort include:

1. Not directly asking for a specific gift.
2. Not asking for a large enough gift.
3. Not knowing enough about the prospect before you go into the meeting.
4. Not listening enough and talking too much.
5. Not asking questions to find out what the prospect's needs are
6. Not discussing the benefits of the gift for both the prospect and the organization.
7. Not being flexible and able to come up with creative alternatives.
8. Not summarizing the highpoints of the presentation before moving to ask for the gift.
9. Not practicing what you are going to say and how you will say it.
10. Asking for the gift too soon.
11. Continuing to speak, rather than remaining silent, after asking for the gift.

After a prospect has made his or her decision, there are two mistakes solicitors commonly make that damage the organization's ability to obtain future gifts. They are:

1. Showing disappointment in the prospect after a refusal or when a much smaller gift than that requested is given.

2. Not expressing a sincere thank-you after every opportunity to present the case for giving, no matter what the outcome.

Board Members Must Be

Fully Equipped With Plans And Tools

As a board member you need to rely on your organization's development staff to provide you with the tools and support to effectively solicit potential donors. If you feel you need more background, training, materials, etc., ask for them. Don't wait until after your solicitation effort has failed and then say, "If you had only given me "X" we could have nailed that gift." It is the development staff's responsibility to supply you with what you need, but it is your obligation to ask for anything you feel is missing.

If you are a board member who understands the importance of board fund-raising efforts and who is committed to helping lead those efforts, I suggest that you sit down with the board chair, the executive director, the development director, and the development committee chair and assess the fund-raising quality of your board.

If it comes up short, determine why.

If you need to provide your board members with some of the training and information discussed in this article, do it.

If you need to add board members better suited to carrying out the organization's fund-raising needs, find a way to add them.

If the organization needs more fund-raising know-how and expertise, find a way to provide it.

Fund-raising is too important to the continuance of an organization for board members not to personally commit to both doing it and providing the resources to create a successful fund-raising environment.

A Board Member's Commitment

In The Truest Sense Of The Word

Finally, I suggest that every board member sign a fund-raising pledge that would read something like this:

As a board member of _____, I pledge to support and take part in all of the organization's fund-raising efforts.

- I will actively solicit gifts for every fund-raising campaign we undertake.
- I will carry the message of the organization's value and importance to those with whom I work and socialize.
- Recognizing that leaders must lead by example, I will make a gift to every fund-raising campaign the organization undertakes consistent with my ability to give and reflective of my commitment to the organization.

Signed: _____, Trustee

In my opinion, any board member should be willing to stand by those words, and any organization needs board members who will.

Those are my views on the subject. What are yours? I welcome your comments and suggestions.

Additional Reading For Board Members

For more information on how board members can contribute to their organization's fund-raising efforts and how to conduct successful campaigns, check out the following articles on my website:

- [Know Your Organization](#)
- [Annual Fund Giving & "Getting" Guidelines For Your Organization's Board Of Trustees](#)
- [How To Recruit Your Volunteer Fund-Raising Team](#)
- [Campaign Solicitation Kits: "For Want Of A Kit A Campaign Was Lost?"](#)
- [Asking For The Money: If You Don't Ask, You Don't Get](#)
- [Campaign Assessment And Review: What Was Accomplished And What Was Learned](#)