

# Turn Your Board Members Into Fundraisers

Transcript of Live Text Chat at The Chronicle of Philanthropy, March 5, 2013

I'm **Margie Fleming Glennon**, editor of online programs here at The Chronicle, and I'll be your moderator today.

First, I'd like to introduce Carol Weisman, an international consultant who specializes in fundraising, governance, and volunteerism. She is also a trainer, public speaker, and author of nine books, including *Fundraising Superheroes* and *Raising Charitable Children*. She has served on 35 boards and has been president of seven. Her company is called Board Builders.

Also joining us for today's chat is Larry Levin, publisher and CEO of the St. Louis Jewish Light newspaper and online news site. He also has had a lengthy career serving a variety of educational, arts, and environmental nonprofits as both a board member and an executive. He holds a law degree from Washington University School of Law and a BA in American Studies from Case Western Reserve University.

Carol, I know you have a lot of practical tips that you can share about how to get a nonprofit's board members more involved in fundraising. Can you share a few?

**Carol:** First and foremost, let people know that you expect them to fundraise BEFORE they join your board. How are you letting folks know what you expect of them when they join your board?

**Larry:** Sure. I echo Carol's statement about expectations before joining board, and would like to add three short points....

1. Ensure Board members understand how fundraising tasks directly relate to advancing the mission...
  2. Make sure folks who don't see themselves as fundraisers understand how their tasks play an integral part in development....
- and finally (3), I like pairing experienced fundraisers with no-so-experienced ones to create mentoring and reduce the perceived stigma.

**Question:** I'm in a new position. My board members feel their time and volunteer participation is sufficient. Others should be making gifts--their gift is their participation. How do I re-direct this attitude? I agree people should be told in advance; unfortunately many of us inherit boards and members who apparently were NOT clearly told this expectation. Or if they were, they seem to have forgotten!

**Carol:** Time is NOT money. The difference between a board member and a volunteer is that a board member is legally, morally and fiscally responsible for the mission. If they don't want to be responsible financially, the board isn't the right place. To transform the culture of a board into embracing fundraising you need to: 1. make the case for support; 2. train your board members; 3. have a plan for rewarding good performance.

**Larry:** Agreed. For those who inherit boards who don't believe this is a responsibility, several things can be done over time (in addition to what Carol just said)....

First, develop a set of board expectations which includes fundraising and (assuming your board chair is in sync), use it not only for incoming board members but ask existing ones to validate it as their terms come up...

**Carol:** Also, board members have to have a graceful way to exit. I have a number of clients who have lost federal and state funding. Their board members didn't need to be involved in raising revenue when they joined. You need to let them find a way to serve your organization without the onus of fundraising, which may now be part of being board members.

**Larry:** I'll skip my second to respond to Carol.... I don't necessarily think that it's an all or nothing proposition. I've seen non-fundraisers turn into effective ones when they are guided in good ways...

**Carol:** Larry and I were also discussing the issue of fundraising training as a part of board orientation. Bring in your superstar to share ideas with your new recruits. Also, feature this person at your board meetings.

**Larry:** So make sure you give them an opportunity to succeed or fail before writing them off--there are lots of tactics to use.

**Carol:** Successful people get training in their field of endeavor. The same thing goes for fundraising. You need to have a plan to educate your trustees.

**Larry:** And at events, if you can pair them with an experienced fundraiser, so they're telling the success stories while the experienced fundraiser is making the ask...they'll start seeing the nexus and it's less intimidating..

**Question:** Can you recommend a few good training sources for our board? We are small (five members - none with prior non-profit experience) and four of the five are very reluctant to fundraise. I'd love suggestions for how to take the fear out of fundraising!

**Follow-up Question:** I've recently been made Chairman of a non-profit ministry board - which is comprised mostly of ministry professionals with no fundraising experience. So in addition to discomfort we feel like we have no skills - or - more importantly - no connections (none of us knows anyone with money). What's the best way to get our board moving in the direction of becoming fundraisers?

**Carol:** I LOVE the Association of Fundraising Professional (AFP). Most chapter have both monthly meetings and mentor program. If your board thinks they don't know anyone with money, have them read "The Millionaire Next Door."

Here's a suggestion from the audience as well. May I suggest a little book published by BoardSource entitled Fearless Fundraising. I've found it helpful.

**Carol:** There are many great books about fundraising. I also like David Sternberg's Fearless Fundraising. I think Penelope Burk's, Donor Center Fundraising is terrific. And naturally, I like my own book, Transforming Ordinary People into Fundraising Superheroes...Even those who hate to ask.

**Larry:** Carol has an acquaintance named Marshall Howard who has a terrific book called Let's Have Lunch Together...takes a very common sense approach to fundraising... Carol also has some great little booklets...she provided us with one about major giving called "Successful Major Donor Solicitation"...very straightforward and common sense.

**Carol:** Marshall's book is a great resource for not just fundraising, but understanding building a support team.

**Question:** Carol, what did you mean by "having a plan for rewarding good performance"? How would you suggest rewarding board members?

**Larry:** So often the whole asking thing looks like a morass which makes it intimidating...but it's not complex, just daunting.

**Carol:** Regarding rewarding board performance: I like an award system i.e. an ABCD Award (above and beyond the Call of Duty.) I wrote an article called 52 ways to reward your board and volunteers. I am not quite sure how to make it available. *(Available on Carol Weisman's website)*

**Question:** We are startup NPO in the St. Louis area. Part of my board orientation is clearly laying out fundraising expectations. The feedback I get from the board is that they understand but feel very uncomfortable making the ask. They also feel because I am not uncomfortable that I suffice for all of them. What eases board members minds in fundraising? What tools can I give them so they feel they have the tools they need to be successful?

**Carol:** First of all, you need to let them know that the competition is fierce. Do they want one fundraiser (you) or do you need 20? Washington University in St. Louis has about 300 in the department. Then you need to break down fundraising into tasks i.e. donor identification, cultivation, "The Ask" and stewardship. Create a menu of opportunities so that they can choose how to get involved

**Question:** We've started doing an annual orientation for new board members where we lay out expectations as fundraisers and give them a "101" view of the organization. However, we've had trouble engaging all of them to the fullest extent possible. Are there specific fundraising tasks that you've seen work particularly well for board members? How do we get them to engage as fundraisers without getting them "caught in the weeds" or bogged down with too many details?

**Carol:** Board members can be great fundraisers by participating in a number of tasks from having at home receptions to calling and thanking current donors. The list is enormous. Larry has a fabulous board member who is a special events superstar. She is organizing his anniversary party for the organization. Another great board member for another client is bringing 40 people to a cultivation event. Different strokes, as they say...

**Larry:** Agreed. I have a new co development chair for whom personal asks are still uncomfy, but her ability to draw folks to donor events is enormous. I have a board member who has some discomfort with asking but who got her spouse's corporate foundation to support the organization and one of our main events.

**Carol:** Some people will never be great at asking. I have been on asks where I wish I had brought duct tape for my board member. Give people choices.

**Larry:** Of course I want them all to be askers first and foremost but I'm not sitting by idly waiting for each to come around...there's an informal plan for how to utilize each of their skills. I also think getting them totally jazzed about the mission can sometimes turn a reticent asker into a more energetic one.

**Question:** Regarding personal gifts from board members, what is an appropriate level gift for a board member to make? Our budget is about \$1million. Do you ask members to give in a range?

**Larry:** We have clearly defined levels of patron/Publishers Society/major gifts, along with multiyear pledges. I consult with Board President and development chairs about appropriate level for each board member...it's very personal

**Carol:** This is tricky. If you want a diverse board, you might want to frame it in a way that allows the board member to choose what they feel is a generous gift. If you have a line of people who want to join your board, request a high amount. I have worked with boards where 80% gave \$250,000 or more, but they certainly weren't diverse.

**Question:** We are a US-based nonprofit with an international focus and are 11 years old. Most of our board lives abroad. We recently had 5 new members join our small board. None of them (old or new) have any fundraising experience and none have ever even made an annual gift. How do we start this process with them? (Making an annual gift and also helping us fundraise.) They are meeting for the first time next week.

**Carol:** Share why your board members need to give funds. Also, be aware that in many other countries, board members are not expected to give, so this will be a new concept.

**Larry:** I don't know if you have any access to someone who has been involved in a nonprofit that has grown from that small level to the next. You might also want to share that many US funders will want

100% participation from board members before they give...but having someone come in and share a success story as an example would be great.

**Larry:** Absolutely...a small "start from scratch" who went to the next level.

**Carol:** I love that idea, Larry. Just make sure it is apples and apples and not apples and oranges. I just had a client who brought someone in who had just raised \$250,000 in corporate dollars. The new board needed to be reminded that it took the other organization 23 years to get there.

**Question:** If you have a large number of government representatives on the board it can be a challenge for them to reach out with all the agency conflict of interest policies. Do you have a way to engage these folks?

**Carol:** I would take your government people off the board and form a Government Leadership Council and engage them based on their talent. Have one person who is interested in governance in general represent the group on the board.

**Larry:** On the gov't reps, I can think of one model that can be effective but it's tricky..... Funny, Carol, I had the "opposite" thought...if the gov't people must be on the board by bylaw requirement, I was going to suggest starting an advisory or leadership group and utilizing it as a surrogate fundraising board.

**Carol:** You can also use governmental folks for stewardship. One of the best board members I have ever worked with was a state Supreme Court judge who wrote brilliant thank you notes to current donors.

**Question:** Larry, can you elaborate on what you mean by surrogate fundraising board?

**Larry:** By that I mean, some nonprofits have bylaws that specify that certain gov't representatives must be on it...so if they are limited in actual asks (while they can do the other tasks Carol describes). Then the leadership council can be charged with some of the tasks for fundraising that would normally be assigned to board members.

**Question:** In having board members schedule introduction and get-acquainted meetings, we hear that they want to wait until they "bump" into the prospect at an event. How do we motivate them to make purposeful phone calls asking for the initial meeting?

**Carol:** You have to be careful when inviting a large number of people who can't or won't engage in fundraising onto your board. In addition to govt. folks, be careful of full time professionals who are raising funds for other organizations. It can work, and work well, but your need to discuss how it is going to work before they walk into the board room. Forget about bumping into people. The other terms for that are "stalking" and "ambushing." I don't know about you, but I want to know if someone wants to discuss a nonprofit with me and whether it fills my philanthropic interests.

**Larry:** Carol is really excellent at treating fundraising as an ongoing conversation about the nonprofit.... I try to have meetings with my board members and community folks to talk about where the Light is going....so when we get around to an ask it has a context in which it can be placed..its not stuck "out there" as something intimidating

**Carol:** You might also want to say, "In addition to yourself, is there someone else who is involved in your philanthropic decision making." Sometimes it is a spouse, child or advisor. Make the meeting count and include the right people. These conversations come AFTER you have cultivated your donor and they know more about your organization.

**Larry:** In the five years I've been here, it's really changed.....now we have board members who say, Can I help with that event or that effort? That's the result of ongoing dialogue.

**Comment:** Here's a great blog posting on monetary board giving from a local Alaskan foundation that requires 100% board giving of all its grantees. They want to see board members with "Skin in the Game."

[www.rasmuson.org](http://www.rasmuson.org)

**Carol:** I really like the term "skin in the game." It is all about sharing commitment.

**Question:** Our organization has never fundraised but has been around almost 50 years. How do we shift this non-fundraising board?

**Similar Question:** As the development staffer for a nonprofit that has mostly been fee-for-service in the past we are now moving into areas requiring fundraising. The Board simply doesn't think fundraising is their job. Many of them are government officials who claim they can't raise money. Thoughts on moving forward in this situation? The Board has literally done no fundraising for at least a decade, if the organization's expansion plans are to succeed we need to start raising more money soon. Thoughts? Thanks!

**Carol:** You have to ask them what the alternative are to fundraising. Reduce services? Change the mission? These are complex and difficult questions. One of my clients just closed down one of their facilities thanks to a 75% government cut from the state. Share the pain with your board members.

**Larry:** I think this touches indirectly on a very painful subject...which is, does the board and board members that served the group well for decades represent the highest and best utilization of community members for today's board. Carol and I have talked with our colleagues about this. Another generation of a group's board came in under different expectations.....but if the board doesn't change with the expectations, the group can be sunk--which raises the question of term limits, cultivation of new board prospects, etc. to fit with the times and needs of the organization.

**Question:** We went through a transition now with new management and re-directing existing Board that were not active as much as we had liked in fundraising. New potential board members are aware; we need help with ones that have been member for a decade under previous management.

**Carol:** You are right. Sometimes the players need to change. I told one member who joined a board after returning from WWII, "You can serve fewer kids, write an enormous check yourself, learn to fundraise or get out of the way for someone who will." He was in his nineties and chose to learn to fundraising. Shocked me to death. He was good, though.

**Larry:** For our particular group, we have three board terms...a one year, then two two-year...and after that, you're either on exec committee, a committee chair or out. This serves as a real gut check for assessing where board members are on a regular interval. Easier said than done, but ultimately necessary to grow the organization.

**Carol:** Make your next retreat all about fundraising training. Give them options, set goals that they agree to and a clear way to measure success. If they choose not to participate, time to go.

**Question:** Can you recommend/cite examples of best practice in corporate fundraising. Several of our board members have ties to businesses but would like to know if there are best practices out there in approaching potential business partners.

**Carol:** I don't have a great source. Maybe someone else does, however remember that of the approximately \$308 billion dollars in philanthropy, approximately 4-5% is donated by corporations.

**Larry:** There's two main reasons businesses will give....to fulfill a personal executive's relationships or to fulfill the company's philanthropic mission...I see a lot of people flail in searching for these dollars, which as Carol says are a relatively small part of the landscape, when other avenues are more successful.