

KATHY HEDGE



# ENGAGING

## YOUR BOARD IN FUNDRAISING

### A STAFF'S GUIDE

BoardSource®

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# FOREWORD

The challenges that organizations face in securing the resources they need to succeed are well documented. Many organizations are teetering on the edge of failure, and many more are forced to forgo advances in their programs or services due to a lack of resources.

At BoardSource, we often hear the frustration and angst from chief executives who are facing these tough realities. Said one chief executive participating in the 2010 *BoardSource Nonprofit Governance Index*, “I am so busy writing grants and trying to raise the money to pay the mortgage and keep the doors open that I don’t have time to get out and develop relationships, cultivate donors, etc. The board has got to become more involved and committed to its fiscal responsibility.”

This connection between executive angst around fundraising results and frustration with board fundraising performance is real. According to a 2013 report from CompassPoint and the Evelyn & Walter Haas, Jr. Fund, *Underdeveloped: A National Study of Challenges Facing Nonprofit Fundraising*, 75 percent of all executives say that board member engagement in fundraising is “insufficient,” with 17 percent of executives indicating that their boards have no involvement in fundraising at all.

BoardSource’s 2012 *Nonprofit Governance Index* indicated that fundraising is the lowest ranked area of board performance, with only 5 percent of all chief executives assigning their boards an “A” and 75 percent giving their boards a “C” or below. And, underscoring the frustration around board participation in fundraising, 40 percent of CEOs report that their boards “rely mostly on the CEO and staff” to fundraise, despite the fact that 75 percent of CEOs report that “expectations related to fundraising are clearly explained during recruitment.”

But it’s not just boards that are shouldering the blame when fundraising results are lackluster. According to *UnderDeveloped*, roughly a third of all executive directors are “lukewarm or dissatisfied” with the performance of their development directors. And, conversely, less than half of all development directors say that they have a strong fundraising partnership with the executive director, with 21 percent of all development directors characterizing the partnership as “weak” or “nonexistent.”

The frustration between boards, executives, and development directors is understandable. If you’re not getting the results that your organization needs, then it’s reasonable to ask the question about whether or not

you have the right people on board to deliver those results. But boards, executives, and development staff all too often get stuck in a blame game focused on determining whose responsibility it is to fundraise, instead of tackling the core issues that might enable them to achieve stronger results.

To move beyond blame requires courage and commitment, and a willingness on someone's part to take the first step. This book suggests that the staff has the opportunity — if not the responsibility — to take the lead. And it provides practical advice on how to take the first step, and the many steps after that.

It is our hope that this book — and the conversations that emerge around it — can provide a pathway out of the blame game toward a stronger, more productive fundraising partnership between your board and staff. One that unleashes the full fundraising potential of the board in a positive and affirming way, and that propels your organization forward in ways that are powerful and real.

Anne Wallestad  
President & CEO  
BoardSource

# ACKNOWLEDGMENTS

The idea for this book first surfaced a few years ago when an acquaintance of mine, who was an executive director for a small nonprofit, lamented that her board was not more involved in fundraising. She said to me, “I wish my board would be more involved in fundraising so that I won’t have to be!” I found the comment surprising. Having worked with board members and fundraising for over 20 years myself, my immediate thought was, “If you are able to successfully involve your board members in fundraising, you will have more work to do, not less!”

From that time on, the idea for this book has been percolating. In the pages that follow, you will find a framework that focuses on the *staff’s role* in engaging your board in fundraising. It’s based on my own experience and the insights of nearly 50 nonprofit practitioners and professionals, along with learnings from motivation research that I have applied to the fundraising area. And the results show reason for encouragement: Board member engagement in fundraising is NOT out of our hands — we as staff *can* make a difference!

I would like to thank the numerous individuals who made this book possible. First, my deep thanks to the terrific BoardSource team that saw the value of this topic, steered this project, and provided editorial review: Anne Wallestad, Rita Santelli, Danielle M. Henry, Anne Atwood Mead, and Outi Flynn. I would also like to thank everyone who provided input on content, editorial review, and recommendations for interview candidates: Marla Bobowick, Colleen Campbell Bozard, Elizabeth Costas, Ginna Goodenow, Karen Green, James Greenfield, Lea Harvey, Debbie Hechinger, Mark Hierholzer, Kathleen Rae King, Chuck Loring, Marci Bernstein Lu, Anne Maynard, Josh Mintz, Paula Morris, Rick Moyers, Char Mollison, Jane O’Connell, Julie Price, Susan Price, Maegan Scott, Robert Shalett, Paula Shoecraft, Larry Slesinger, Dave Sternberg, Don Tebbe, and Linda Wood. And a very special thanks to Kathleen Rae King for encouraging me to write this book in the first place, and my husband Russ for encouraging and assisting me along the way.

This book reflects the learnings and experience of the nearly 50 nonprofit leaders I interviewed. I am deeply grateful to all of them for sharing their insights with me as staff members, board members, consultants, and/or funders of nonprofits. Throughout the book you will see numerous examples, quotes, and stories from those interviewed. They make the advice in this book come to life.



My deep gratitude goes to all of those interviewed:

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# INTRODUCTION: FRAMING THE PROBLEM

## Read This Chapter First!

“I can’t get my board to fundraise!” If you’ve thought that lately, then this book is for you!

And you are not alone. Studies show that board member participation in fundraising is considered to be inadequate by executive directors and board members alike (see sidebar at right).

When seeking solutions to address this issue, many fundraisers start by asking the question, “What are the barriers that keep board members away from fundraising?” Certainly this is a very good question to ask. Some board members do not feel comfortable asking their friends or colleagues for a financial contribution to their organization, or they may worry about reciprocity. Others have mistaken notions of fundraising; they see it as “cold-calling” or “arm-twisting,” and only about “asking for money.”

While it’s helpful to examine the barriers for board members, I suggest that it’s not the only question to ask. It’s equally important to look at what is keeping *staff members* from being more successful at engaging board members in fundraising. Of course, the end result is still the same — board members more motivated and ready to raise funds to advance our

### SPOTLIGHT ON FINDINGS

#### Surveys Show Lackluster Board Engagement in Fundraising

Recent studies show that involving board members in fundraising continues to be a challenge for many nonprofits. In the 2012 *BoardSource Nonprofit Governance Index*, a substantial number of chief executives — 40 percent — reported that their board members are reluctant to participate in fundraising. In addition, ‘fundraising’ was the lowest scoring area of performance among the board’s basic responsibilities — a ranking that has been constant in the 20 years of the survey.

In the study, *UnderDeveloped: A National Study of Challenges Facing Nonprofit Fundraising*, released in 2013, 75 percent of executive directors called board engagement in fundraising “insufficient” and 17 percent reported no board involvement in fundraising at all.

Even board members rate their fundraising performance to be lackluster. In research conducted for her 2012 book, *Donor Centered Leadership*, Penelope Burk found that board members gave themselves collectively a 4.7 on a 7-point scale to this statement: “My board makes a significant contribution to the bottom line through fundraising” (on the 7-point scale, a score of 5.2 or higher was considered marginally effective; a score of 5.7 was considered very effective).

missions. But the path to success depends to a large extent on the *staff members* who support, guide, and engage the board.

Make no mistake — participation in fundraising is part of a board's core responsibility of ensuring adequate resources to advance the organization's mission. But it is the staff's responsibility to inform, engage, train, facilitate, and support board members in undertaking activities that will advance the fundraising program on behalf of the nonprofit. With our in-depth knowledge of the organization and fundraising, we are best positioned to create an encouraging environment that supports board member involvement.

So what are the barriers that keep us as staff from being more successful in engaging board members to fundraise? And how can we increase our chances for success?

## HOW ARE WE MISSING THE MARK?

The executive directors and development directors interviewed for this book identified a number of reasons why we as staff sometimes miss the mark when it comes to engaging our board members in fundraising. Perhaps you will relate with one or more of the sentiments below:

- **We forget that board members are volunteers.** Board members have busy lives — most have professional jobs, families, and other civic and volunteer obligations. They do not live in the day-to-day reality of our nonprofit organizations the way we do. When we forget this, we don't provide adequate context and background on issues, and we don't reinforce the connection to the mission that board members need on a regular basis to keep them engaged and motivated. Staff also overestimates what board members know about their organizations, and we underestimate how much support and assistance board members need to be successful in fundraising.
- **We are waiting for board members to mobilize themselves and take the initiative around fundraising.** Most board members don't join the board with the express purpose of fundraising. And board members who are uncomfortable with the notion of fundraising are unlikely to step up on their own. More importantly, in most organizations with professional staff, fundraising is a *staff-led* function that board members assist with, so board members depend on us to mobilize them and give them guidance — respectfully and with a deft touch.

- **We don't set clear expectations about fundraising with individuals before they join the board.** Some nonprofit leaders are reluctant, even nervous, about having the “fundraising conversation” with a prospective board member, so they gloss over the topic instead of being crystal clear about expectations. Other times, the conversation centers around the personal giving of board members with little to no attention paid to how board members are expected to be involved in the rest of the fundraising process. When we do talk about the fundraising process, we keep it vague by simply saying, “board members are expected to assist with fundraising,” without explaining what that means.
- **We start the conversation about fundraising at the wrong place and at the wrong time.** We often introduce the topic of fundraising to our board by announcing a training session for board members, or by setting out how we expect them to play a role in the annual campaign. From the board member's perspective, this is not the way or place to begin. Rather, we need to explain the need, provide context, clarify roles, and build consensus so that there is a common understanding about why the organization is reaching out to the board around fundraising at this time.
- **We use a “one-size-fits-all” approach.** Not all board members can or will engage in fundraising activities in the same way. Some board members may turn out to be fantastic solicitors of gifts, but some will be better deployed in activities that do not involve asking. And if your board has traditionally not been very engaged in fundraising, the process of getting them involved may take some time. Staff members who rely on a “one-size-fits-all” approach, and who expect board engagement to be a relatively quick process, are likely to become frustrated and will frustrate board members as well.
- **We don't know how to “manage up.”** Supporting and managing board member participation requires the tricky skill of “managing up,” that is, managing someone in a position of higher authority. The inverse power relationship can make it difficult for staff to manage board members, especially if the board member is being asked to do something (such as fundraising) that she does not want to do and may resist.

Quite a formidable list — no wonder this is so hard!

Difficult, yes. But not impossible.

## SUPPORT YOUR BOARD MEMBERS' INTRINSIC MOTIVATION

A pivotal insight that can help us work more effectively with our board members can be found in new thinking about human motivation. When you hear the word “motivation,” what comes to mind? Perhaps a coach giving his team a pep talk before the big game? Or a company setting up incentive bonuses for superior employee performance? That’s what is called “extrinsic motivation” — words and actions from one person that are intended to motivate another person to take action.

But as it turns out, *extrinsic* motivation is not as effective as *intrinsic* motivation — motivation that comes from *within* a person. Leading researchers in human motivation<sup>1</sup> have discovered that intrinsic, or self-motivation, is much more effective in influencing behavior.

How can we leverage this to our advantage when engaging board members in fundraising?

First, we can set aside the traditional notion that our task is to “motivate our board members.” It’s no longer that relevant. Here is the more important question: How can we set up the conditions in which board members will motivate themselves? This is not semantics; it’s a game changer. When our framework is to “motivate the board,” we might look for ways to “control,” e.g., to make board members feel pressured to fundraise, and perhaps guilty if they don’t. While pressure and guilt can work to motivate people in the short run, it is less successful in the long run. Here’s the better way: adopt a style that affirms the board member’s perspective and autonomy. This creates an environment that encourages self-motivation. In practice, this means

- building relationships with board members and listening openly to understand their interests, needs, and concerns. This will help us recognize their individual perspectives and appreciate what they can and want to offer to the organization
- providing opportunities for board members to connect with the mission of our organizations in a personal way
- taking the time to lay out the background and rationale of our fundraising program and the board’s role in it
- inviting (rather than pressuring) board members to become involved in fundraising, and offering choices about what their participation can look like

- providing ongoing training, assistance, and support so board members can be successful at the fundraising activities in which they are engaged

The goal is for board members to engage in fundraising activities because *they themselves* see the value in it, have a commitment to it, and can be successful at it — not because we induce them to. Our role as staff is about facilitating that awareness and aspiration. We help board members see the value by engaging them in a conversation about the organization's strategy and future plans and the fundraising activities that support them. We help board members strengthen their commitment by providing opportunities to experience our programs and services in action, and to witness the changes that result. And we help board members be successful by managing the fundraising process and supporting their participation in it.

## **WHO SHOULD READ THIS BOOK**

This book is written for the nonprofit staff members who lead and manage the fundraising programs in their organizations. First and foremost, that's the executive director. Even in organizations with well-staffed development departments, the executive director plays a critical role in providing leadership to the fundraising program and personally being involved in fundraising activities. In lock-step partnership with the executive director, and overseeing the fundraising program, is the development director. The executive director and development director are an important team, and the advice in this book is meant for them to use *together* to engage their board members in the fundraising program in a meaningful way. Board members also might find the book of interest, particularly those who are seeking to spur fundraising activity from their board colleagues. The board environment that I am advocating the staff to create can best be reinforced by the volunteer leadership.

## **THE ROAD MAP FOR THIS BOOK**

Drawing from scores of interviews with nonprofit leaders, this book presents a variety of tested ideas and practices for successfully engaging board members in fundraising. It's not just about doing more, it's also about doing things differently.



## **Chapter 1 – The Prerequisites**

This chapter discusses issues that should be in place before you start to engage your board members in fundraising, such as

- knowing the staff capacity that you plan to invest in supporting your board
- ensuring that you are setting clear expectations about fundraising before individuals join the board
- attaining a baseline level of organizational capacity so that your board has a stable platform from which to engage in fundraising

*NOTE: IF YOU HAVE ALREADY ADDRESSED THESE ELEMENTS IN YOUR ORGANIZATION, SKIP THIS CHAPTER AND START AT CHAPTER 2.*

## **Chapter 2 – Connect to Mission**

This chapter addresses ways to energize board members by getting them excited about the mission of your organization, such as

- bringing mission moments into board meetings
- framing board discussions around mission
- taking board members to the mission

## **Chapter 3 – Articulate How Funding Works for Your Organization**

This chapter addresses how to establish the context for, and depth of, your organization's fundraising program so that board members can better understand both the big picture and how they can fit in. Topics covered include

- explaining the funding mix
- clarifying roles in the fundraising process
- helping board members own the discussion

## **Chapter 4 – Build Relationships with Board Members**

This chapter focuses on how to build relationships with board members, establish trust, and instill a sense of team. Topics covered include

- working with board members one-on-one
- focusing on key relationships
- cultivating meaningful relationships

## **Chapter 5 – Create a Structure to Engage Board Members**

This chapter presents ideas and suggestions for how to create a structure to enable your board members to successfully engage in fundraising tasks, such as

- creating opportunities for donor and board member interaction
- developing a campaign structure to guide board member participation
- defining what success in fundraising looks like for board members

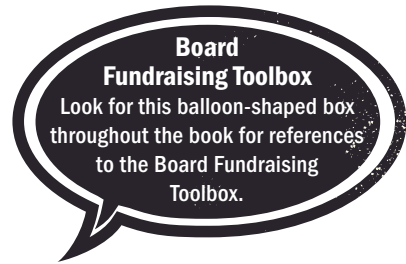
## Chapter 6 – Support Board Members Every Step of the Way

This chapter presents suggestions for how to assist and support your board members to successfully take on their fundraising tasks, such as

- assisting with specific steps of the process
- providing formal and informal training
- recognizing and thanking board members

## Appendix – Board Fundraising Toolbox

The appendix contains a set of tools and templates to help jumpstart your work with your board.



## WANTED – YOUR FEEDBACK!

I'd love to hear your feedback on this book. If you have suggestions, counterpoints, or personal examples that would make a concept more relevant, or research data related to this topic, I'd love to hear from you. E-mail me at [kathyhedge@verizon.net](mailto:kathyhedge@verizon.net). Thank you in advance!