



WHAT WOULD YOU DO?

A GOOD BOARD THAT WON'T FUNDRAISE

Forrest Sinclair said good night to the last of his board members and closed the door of the office. He liked his board members, and the quarterly meeting of the board had gone relatively well. As chief executive, Forrest felt good about the direction the Elizabeth Waters Wildlife Sanctuary (EWWS) was heading. The sanctuary was more involved in educational outreach, had initiated collaborations with other conservation projects in the region, and was investigating opening a small retreat center as a source of earned income. Forrest felt secure in the support of his board as the organization pursued these projects.

At the same time, he was frustrated about the board's level of participation in fundraising. Especially since many of them had a demeanor suggesting they were natural-born fundraisers, as well as connections in the community. In fact, most of them served on other boards, some of which were small natural history museums, environmental organizations, and even foundations.

To the board's credit, some board members had provided Forrest with lists of personal contacts who could be cultivated for donations. However, the sanctuary's development staff members were having a hard time getting through to those on the lists. And Forrest himself had tried to call a few people, casually mentioning the name of the board member who knew the prospect, but the potential donor usually put him off.

A few members also had expressed willingness to participate more actively in fundraising, but said they really didn't have much experience asking for money and didn't know how to proceed. Forrest immediately mailed each board member a copy of a 20-page funding proposal that the development staff had just polished, along with a memo saying that all the information about the sanctuary's programs and strategies was in there and that should be plenty to prepare the board members for funder visits that the development staff would arrange. As Forrest had described it, the fundraising process was simple: Go in, give your spiel, and ask for a donation. Uncomfortably, board members said they'd be glad to help, but did they have to do that?

After that, a few of the newer board members complained that they had not realized when they joined the board that they would be expected to attend funder meetings and ask for money. They said that they had already tapped into their wealthy associates for other organizations and could only be expected to ask for so much.

Forrest was convinced the board had the potential to be a strong fundraising board. The members were, for the most part, engaged and enthusiastic about the sanctuary's mission — and they had connections. What was keeping them from stepping up and following through?



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How would you solve the dilemma described in this case? This exercise is especially constructive used as the basis for a robust discussion among board members around the board table. After you've finished writing your own responses, see how your solutions compare to those written by other nonprofit leaders on the following page.



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Worksheet

RESPONSE 1

There really are no foolproof ways to turn recalcitrant board members into fundraising disciples. There are, however, certain things that an organization can do to promote active board participation in its fundraising agenda.

First, the board must clearly understand the organization's fundraising need. Some board members may be reluctant to ask others to contribute if they believe, for example, that current and projected expenses can be met by enhancing earned revenue sources (e.g., better marketing, investment management, etc.).

Second, ensure that new members understand that their board service carries the responsibilities of providing direct financial support to the organization, as well as soliciting the support of others. Clearly communicate these responsibilities early in the board recruitment process and confirm them, in writing, in a board orientation manual provided to each board member and reviewed with the board chair and organization's chief executive.

Third, consider involving reluctant board members at the end-point of the fundraising process. Ask them to sign, on the organization's behalf, thank you letters to significant donors. This can be an effective way to promote board members' personal involvement in and comfort level with the fundraising process.

Fourth, never send a board member a 20-page funding proposal, as did Forrest Sinclair. Stick to one-page, bullet-pointed executive summaries to support your board members' fundraising efforts. The principle here is simple. Make sure you do all of your work before you ask the board to work for you.

Finally, do all that you can to build among your board a deep, abiding, and personal pride in the organization, its role in the community, and the professionalism of its operations, including its development efforts.

RESPONSE 2

Forrest is mistaken. Few board members are "natural-born fundraisers." But almost all can improve their performance with the help of ongoing training. Forrest needs to educate his board about the whole process of fundraising and team building — not just give them 20-page proposals or ask for lists of contacts.

It seems that Forrest needs some basic training himself! He expects his board members to simply "go in, give their spiel, and ask for a donation" with no reference to the importance of prior prospect research or donor cultivation. Perhaps if he would model with his own board the kind of relationship building, communication, and clear goals that are crucial to successful fundraising, he might get more support.

Further, Forrest has not created a context for fundraising. There is no mention of a strategic plan or annual board goals. He seems to want his board to raise money without making the connection between funding priorities and long-range goals, and he has failed to emphasize why a strong board member-staff development team is crucial to achieving these goals. He is also giving his board mixed messages about what he wants from them. He asks for contacts but doesn't invite the board members to join him in making calls and then wonders why he can't get appointments.

The fact that some board members complain that they had not realized they would be expected to fundraise suggests that Forrest should work with the nominating committee to be clearer about these expectations from the outset.

When his trustees understand that their most important role as fundraisers is to speak knowledgeably and passionately about the mission of EWWS and to cultivate interest in its programs with their friends and in the community, they will accept fundraising as a natural and achievable obligation of board membership. Every board member can do that.

RESPONSE 3

Forrest should not be surprised that his board members are not “natural-born fundraisers.” Fundraising skills take time to develop, and this has not been a priority of the EWWS board in its recruitment or board development activities. If the financial condition of the organization is sound, why would board members think that anything more is required of them? Forrest seems to be somewhat naïve to think that mailing board members the funding proposal would prepare them adequately for funder meetings.

To change the board's direction will take work and time. In the long term, the board will need to clarify its policy on board giving, to be more direct about what it expects from members in opening doors to donor prospects, and to ensure that board recruits know what will be expected of them. Ongoing training and support for board members will be required, suggesting the need to meet more frequently than its current quarterly schedule. Forrest is right to begin with the board's chair because her support and leadership will be essential to the effort.

In the short term, the new retreat center is a good opportunity to rally board members to increase their financial commitment and to build some fundraising skills. Forrest and the chair might begin by selecting a team of board members to spearhead the project. Alternately, they might use strategic planning techniques to involve the whole board in developing strategies to implement the project. The key to both long and short term approaches is to make board members more aware of the importance of their personal commitment and to give them appropriate training and support. Forrest should make better use of the organization's development staff in this effort.