

Top Ten Ways to Cultivate a Fundraising Board

One of the most common challenges for the staff of a nonprofit organization is engaging its board members in the work of fundraising. More than ever before, *every* board member (actually, everyone in the organization!) must be involved in one way or another with revenue generation. Here are the top ten ways to recruit, develop, and sustain a board of directors that will fulfill its most fundamental responsibility: healthfully sustaining the organization into the future.

1. **Recruitment:** Recruit members who will give or get
2. **Orientation:** Indoctrinate to the culture of the organization early
3. **Annual Meetings:** 1:1 meetings between president and each member to discuss individual and organizational performance
4. **Contract:** Annual give/get contracts discussed and signed at board meeting
5. **Training:** Update fundraising skills updated before every campaign
6. **Follow-Up:** Staff follow-up throughout campaign
7. **Accountability:** At least quarterly reports from staff on board fundraising performance
8. **Rewards:** Reward the successes, individual and organizational
9. **Personalization:** Find out the individual board member's personal connection to the mission; make a connection between that passion and fundraising for the organization
10. **Transparency:** Be open and honest about the needs of the Organization

New Board Member Commitment to Serve Pledge

I, _____, recognizing the important responsibility I am undertaking in serving as a member of the Board of Directors of THE ORGANIZATION, hereby, personally pledge to carry out in a trustworthy and diligent manner all the duties and obligations inherent in my role as a member of the Board of Directors.

My Role:

I acknowledge that my role is to contribute to: defining the organization's mission, governing the fulfillment of that mission, and carrying out the functions of a board member and/or officer as specified in the THE ORGANIZATION bylaws and policies. My role as a board member will focus on the development of broad policies that govern the implementation of the institutional plans and purposes. This role is separate and distinct from that of the executive director to who is delegated responsibility for determining the means of implementation of board policy.

My Commitment:

I will exercise the duties and responsibilities of this office with integrity, collegiality and due care.

I Pledge:

1. To follow the Board of Directors Code of Ethics.
2. To make attendance at all meetings of the board, committees and task forces on which I serve, a high priority. And to come to meetings prepared to contribute to the discussion of issues and business to be addressed, having read the agenda and all background support materials.
3. To participate in strategic planning retreats, board self-evaluation programs, and board development workshops, seminars and other education events that enhance my skills as a board member.
4. To recognize conflicts of interest between my position as a board member and my personal and professional life. If such a conflict does arise, I will declare that conflict before the board and refrain from voting on matters in which I have a conflict.
5. To make a financial contribution under my name at least annually. I pledge to make a personal Financial Commitment of \$ _____ for the year of _____.

One-time payment in the month of _____

Quarterly payments of \$ _____

Monthly Payments of \$ _____

Payments can be made in cash or check or gifts of securities.

In addition to my personal gift, I will help the organization secure its needed contribution income by participating these activities:

(Please pick two)

- I will work to secure a contribution from companies or businesses with which I am affiliated.
- I will make introductions to people and organizations in my personal circles of influence that may have the capacity to give by:
(choose all that apply)
 - { } Signing solicitation letters and or making phone calls
 - { } Setting up opportunities for the Executive Director to interact with potential donors in person
 - { } Hosting a "friendraising" event at my home or business\home\club
 - { } Other: _____

- I will support Special Event 1 by:
(choose all that apply)
 - { } Recruiting sponsors
 - { } Selling XX tickets or donating \$XX
 - { } Volunteering my time the day of the event

- I will support Special Event 2 by:
(choose all that apply)
 - { } Securing sponsorships
 - { } Securing vendors
 - { } Securing in-kind donors
 - { } Volunteering my time my time the day of the event

- I will help THE ORGANIZATION get to know it supporters by making thank you call to donors.

If, for any reason, I find myself unable to carry out the above duties, I agree to talk with the board development committee and, if need be, resign my position on the Board of Directors.

Board Member Signature

Date

TIPS ON HOW TO ADDRESS THE BOARD'S #1 CHALLENGE: FUNDRAISING

It should no longer be a surprise that many nonprofit boards struggle to fulfill their fundraising responsibilities. [Leading with Intent: 2017 National Index of Nonprofit Board Practices](#) echoed previous years' studies in reporting that board chairs and chief executives (CEOs/executive directors) ranked fundraising as the biggest challenge area facing boards. Less than half (40 percent) of chief executives surveyed responded that their board actively participates in fundraising versus relying mostly on the chief executive and staff.

Given that the struggles with board fundraising are not new, the question becomes why boards haven't found a way to address this issue. One of the reasons may be that there is no quick-fix solution. Boards committed to improving their fundraising performance must embrace a comprehensive and ongoing approach that covers all facets of the board service cycle: recruitment and orientation, board meetings, and overall board culture.

RECRUITMENT

Leading with Intent found that

- only 67 percent of chief executives believe fundraising expectations are clearly articulated during recruitment
- only 31 percent of chief executives and 19 percent of board chairs assign a high priority to fundraising responsibilities when recruiting new members
- 72 percent of chief executives believe that board diversity is very important or important to increasing fundraising or expanding donor networks, yet the majority of board chairs and chief executives do not report demographic diversity as a high priority in board recruitment

Based on this data, it is clear that boards are not using the recruitment process to their advantage. To address this, boards can

- add skills aligned with the fundraising tasks your board members are expected to complete to the skill sets you are recruiting for. Even if someone does not have direct experience asking for support, other skills, such as public speaking, pertain.
- be candid about expectations surrounding fundraising when discussing board service with board candidates. Provide them with as much information as possible, such as whether board members are required to make a personal contribution and how they will be expected to assist with fundraising efforts, helps ensure that new board members understand that fundraising is a fundamental aspect of board service.
- Define what the ideal board composition looks like in terms of diversity and then focus on finding it. For some boards, this means changing the way they identify potential candidates by moving beyond the personal networks of existing board members and considering nontraditional recruitment strategies, such as a posted board search or use of a search firm.

When fundraising expectations are clearly articulated during recruitment, 52 percent of chief executives report their boards are actively engaged in the organization's fundraising efforts.

When fundraising expectations are not clearly articulated during recruitment, only 12 percent of executives report that their boards are actively engaged in fundraising efforts.

ORIENTATION

Leading with Intent found that boards that have a strong understanding of their roles and responsibilities are better at fundraising than boards with a weak understanding of their roles.

- To ensure that your members have a strong understanding of their fundraising roles and responsibilities,
- provide new board members with a written job description and/or the board's [fundraising policy](#). Asking new board members to sign the job description during orientation signals their intentions early on and provides a document that can be referred back to throughout their term of service.
 - Incorporate fundraising training into new board member orientation. Teaching board members about the many different ways they can be involved in fundraising — hosting “friendraisers,” writing thank you notes, making introductions, etc. — allows everyone to find an appropriate level of participation at which to begin their board service.

PERSONAL GIVING

One of the least time-intensive, and most impactful ways board members can participate in fundraising is by making a donation. However, only 59 percent of chief executives report in *Leading with Intent* that board members are required to make a personal contribution to the organization. BoardSource's [Recommended Governance Practices](#) suggest that all boards should strive for 100 percent board giving.

The amount of the gift is not what boards should focus on. While all board members should be encouraged to make an annual stretch gift within their means, the overall goal is for all board members to show their support of the organization through a donation. Board members who do so are able to point to their support and articulate why the cause is important to them when meeting with potential donors.

Some organizations connect fundraising to personal giving. For example, board members asked to raise \$5,000 can donate all \$5,000 personally, raise \$5,000 from their personal connections, or do a combination of both.

FUNDRAISING CULTURE

Setting clear expectations with board members is one of the best ways to reshape the board's fundraising culture. Boards that understand their responsibilities are much better equipped for success and are likely more invested in achieving fundraising goals.

However, clarifying expectations should not stop after the recruitment and orientation processes are complete. There are opportunities throughout board members' terms of service to reiterate individual responsibilities and strengthen board members' commitment to fundraising.

Leading Practice #10:

Personal Giving

If the organization engages in fundraising, every board member should make a meaningful personal contribution according to his or her means (while not conflicting with any legal stipulations); the board should attain 100-percent board giving.

By making a personally meaningful gift, each board member demonstrates his or her commitment and trust in the organization, which also enables him or her to function as a more credible fundraiser and inspire other donors.

Board Meetings

Board meeting agendas should reflect organizational priorities. If board members never talk about fundraising, chances are they won't consider it essential to board service. Considering spending a few minutes at each board on fundraising — brainstorming new strategies in response to a challenge, discussing potential donors, or reporting on and celebrating successes.

Some boards include a “fundraising summary” in the board meeting preparation materials. The summary is anonymous but lists individual giving histories for each board member. This can be an effective way to encourage those who haven't yet contributed without calling them out individually.

Ways board members can be involved in fundraising without “making the ask”

Candidates may be scared off from board service if they think all their time will be spent cold-calling contacts to ask for money. In reality, however, there are many avenues to get involved in fundraising that board members can use to build up their skills before eventually making a direct ask. Make sure you communicate this during the recruitment process.

- Advocate for the organization by sharing its mission and why it is personally important
- Attend board training opportunities related to fundraising
- Participate in board discussions to assist in developing and evaluating the organization's fundraising strategy
- Identify and evaluate prospects
- Thank donors for their gifts
- Attend and invite guests to fundraising events, donate auction items
- Cultivate gifts by discussing organization's work and successes with colleagues, and inform the necessary individuals (board chair, development committee, etc.) about potential donors' levels of interest
- Host fundraising events
- Participate in face-to-face meetings with staff members and potential donors

Resources:

[*Fearless Fundraising for Nonprofit Boards*](#), [*Fundraising Responsibilities of Nonprofit Boards*](#), [*Leading with Intent: 2017 National Index of Nonprofit Board Practices*](#), [*The Nonprofit Policy Sampler*](#)