# How to Engage Nonprofit Board Members in Fundraising at Year End and Year Round





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Inside Look...

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Summary

## ntroduction

oards and fundraising, I find, often mix as well as water and oil. You know this. You've seen it. Perhaps you are living it, dealing with board members who say "I'll do anything but fundraise" and who tell you that they couldn't possibly give you the name of one person who might care enough about what you do to make a charitable gift. Believe me, you are not alone.

I do a lot of board training. Typically, I walk into a room full of lively, engaged people. Then I get introduced, and someone says, "Janet is here to talk with you about fundraising." And suddenly, these engaged people cross their arms and legs, purse their lips, and resolutely stare at the floor.

Boards are afraid of fundraising, and often with good reason. It makes them uncomfortable; they worry about losing friendships, they fear rejection. Mostly, however, board members tell me that the biggest barrier to them fundraising is the singular fact that they do not know what to do.

But you can change that. The goal of this ebook is to help you better engage your board members in fundraising at the end of the year and all year round.



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### **DOING WHAT YOUR BOARD NEEDS**

Years ago, when I had my first go at getting my board members to help with our end of the year fundraising, I called my sister and — in meltdown mode told her how much I really hated my board. I expected my sister to commiserate and not just because that's what sister's do.

In many ways, my sister and I are mirror images of each other. I live on the west coast; she resides on the east coast. I have always had to work for a living while she has been a person of leisure for almost as long as I've known her. I work at nonprofits and she has served on numerous nonprofit boards. My work is largely about fundraising, and she is largely (pun intended!) a major donor.

There I was, getting no joy from my board members who uniformly were not fundraising. In desperation, I called her and told her how my board members just were not doing what I needed them to do. There was a beat of silence, then she said, "Are you doing what they need you to do?"

Hmmm, probably not. What I did was what I (now) always tell fundraisers NOT to do. I focused on my needs and didn't bother to find out what they might need. Like too many of us, I simply demanded that they bring in names of people who could make a large gift, without considering the cost to them in doing that. I expected them to sell tables to our galas, convince our donors to



give at the end of the year, and persuade perfect strangers to donate. If we talked about their fears of fundraising, I focused on the fear of rejection—a fear I understand well.

My sister reminded me that for board members, no isn't actually so bad. Yes is far more fraught. For every time their friend says yes, I will support your organization, there is that unspoken acknowledgement that in return, your board member will

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support theirs. Is it any wonder that the "f" word makes them quiver?

It can be frustrating. But it is frustrating not only for you but also for your board members. No one comes on a board with the intention of being a bad board member. And yet, at least as it relates to fundraising, they so often are. The good news is that you can turn it around.

While each and every board member may not become a fundraising superhero, you can engage your board members in fundraising, especially at the end-ofyear, where most nonprofits get the majority of their charitable revenue.

Getting your board to engage in fundraising at the end of the year will not only increase how much you raise but also gets your board members primed to be an active fundraising partner throughout the year.

But before we focus on year end giving and getting, let's look at the foundations of board fundraising and what is necessary to get them to become engaged in raising funds.





## The Importance of a Culture of Philanthropy

Before you can have a great fundraising board, you must have an organization that exudes a culture of philanthropy. If the leaders of the organization are not convinced that fundraising is really important, important enough to support and provide needed resources to ensure fundraising success, then fundraising simply will not happen.

#### Having a culture of philanthropy means that:

- Fundraising sits at the center of the organization
- Everyone involved with the organization staff, clients and their families, volunteers, donors can talk about why and what the organization needs to fulfill its mission
- Everyone sees him or herself as an organizational ambassador
- The Board understands its fiduciary responsibilities
- The ED is provided the time to be involved with fundraising and the resources to have a robust fundraising program.





#### Organizations with a culture of philanthropy also share values that include:

- Ethical Behavior/Integrity
- Collaboration/Teamwork
- Stewardship/Donor Recognition

#### A BIG THING ABOUT ORGANIZATIONS WITH A CULTURE OF PHILANTHROPY – A CULTURE OF FUNDRAISING – IS THE WAY THAT FUNDRAISING ITSELF IS VIEWED.

Organizations that value their donors share with them the impact of their generosity, and take the time to get to know those who contribute, have a culture that supports fundraising and understands its importance. If, on the other hand, it is the belief of the people in your organization, if the language they use, says that donors are chumps, that they are people you are hitting on, they are ATM machines, then whatever culture you have at your organization sure isn't one that promotes joining in to support your work.

Building a culture of philanthropy—and I believe that this isn't something that simply happens but is, rather, something that must be taught, nurtured, improved upon—starts at the top.

Leadership—both at the staff and board levels--must believe that fundraising is a gift you give to your donors; a gift that enables them to be part of something spectacular. This is one reason why it is so important that your board members are engaged with fundraising.





## Staff Roles in Engaging Board Fundraising

hen my sister called me out for not doing what my board needed from me, it really gave me pause. I began to think about my and my staff's roles as it related to board fundraising. Was it simply to demand and then nag (something I have great skill in) that they go forth and fundraise?

If we believe that "boards fundraise," then surely my job had to include supporting and supplementing the fundraising work I expected of my board members and other volunteers.

I'm going to suggest, therefore, that the first step in developing a board that understands and fulfills its fundraising goals is to ensure that your staff understands its fundraising responsibilities.

Yes, raise money. But honestly, their number one priority is to support and supplement the fundraising work of board members and volunteers. Fundraising professionals are actually volunteer managers who identify, motivate, and support the work of volunteers.



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When I took my job seriously, I discovered that my board was more willing to consider fundraising as something they needed to do. There were still steps that had to be taken, but finally, they lifted their heads up, uncrossed their arms and legs, and were willing to entertain the idea.

## GETTING THE BOARD COMFORTABLE WITH FUNDRAISING

To get my board comfortable as fundraisers, and as a means of supporting volunteers, staff must develop materials that "make the case" for charitable giving to your organization. This includes developing and managing the fundraising plan, organizing the work of volunteers, employees and others. Working closely with the CEO and chair of the development committee, they keep the board up to date on fundraising successes, challenges, and opportunities.

Staff members also maintain accurate information on current and prospective donors, produce reports that show funds raised from different sources using different methods; manage online and direct mail campaigns; write proposals and submit reports to funders; send thank you notes and gift receipts; and manage special events.

Fundraising staff are responsible for building infrastructure and capacity. They help ensure marketing and communications tie to fundraising and, as appropriate, help develop cause marketing programs and donor benefit packages.

Be realistic: asking your board members to call donors, make appointments, ask for a gift is like asking your child to make his or her own dentist appointment. It just is not going to happen.

If you can remember that your job is to motivate and support their fundraising efforts you will ensure that you are doing everything so that your board member can be as knowledgeable and comfortable doing what he or she needs to do to help get the gift.





## Having the Right Board for Fundraising

don't care what you do, if you do not have the right board members, you will never get them engaged in fundraising. Not at the end of the year nor at any other time. Too often, we simply put bodies on our board—friends of current (not very engaged) board members; staff of a company you hope will give you money; your friends, someone that someone else told you had money. Worse than simply appointing almost anyone who breathes is the fact that we tell them that their roles and responsibilities amount to coming to a meeting. Quarterly.

**Let's be clear:** Being a board member is a serious undertaking and you must be transparent about what it means to be a board member--particularly as it relates to philanthropy — at your organization. As you recruit new members, having a written job description and a board agreement that you will ask them to sign, will help.

Of course, you are probably not starting with a clean slate. You already have board members who you must get excited about joining with you in fundraising. To do that, they have to understand their fundraising roles. That means that you have to understand what you are expecting from them and whether that expectation is reasonable.





## **EXPECTATIONS FOR BOARD FUNDRAISING**

Presumably, most of your board members are bright, successful people. And presumably, most of them aren't fundraisers by profession. There's a reason for that: they don't want to be professional fundraisers. So why do we pretend they should be? What they are, are volunteers who are passionate and committed about the work of our organizations. And it is that which we need to harness.

Begin by giving current members a primer on what their fundraising roles are. Consider what kinds of fundraising you are currently doing and how you expect them to partner with you. And think about how you would like to be fundraising—and consider how you can engage them.

Ideally, board members will be able to open doors for you and bring new people to the table. I know, we already ascertained that they are NOT giving you the names of people who can give you large gifts. That may not be what you need.

Look to your database and create a small list of loyal donors who you have reason to believe could give you a larger gift. Bring that list to your board meeting and ask, "Who knows anyone on this list?" If no one does, who works in the same field, lives in the same community, has kids going to the same school?



At one organization where I worked, I had a fabulous board of 33 members. Each and every one was wonderful. Truly. However, all of them were also board members of another, larger organization in our community. Over 90% of them belonged to the same church. About the same percentage were members of the same Rotary club. They were all of an age, lived in close proximity to each

other and had the same circle of friends. Can you see the problem?

I needed one, maybe two of these fabulous board members. Then I needed another 31 or 32 who could reach into different cohorts of people and help me get a toehold.

As you think about the right board, again

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consider your role in helping to engage that board in fundraising. I learned early on that while Board Member A might admit to knowing prospect B – or might have even brought this name forward – it was highly unlikely that A was actually going to reach out to B and ask for a meeting. That, my friends, was my job – and is yours.



## **REACHING OUT - WHO MAKES THE CALL?**

As connections were uncovered, I would sit with my board member and ask him or her to pull out the calendar. I'd then ask for two or three dates and times when they could meet with this prospect in the next three or four weeks. Armed with that, I would contact the prospect, dropping my board member's name, and say that I had been asked to set up a meeting for the three of us.

Because this was the job I was being paid to do, I made those calls and got those appointments. And I made sure to lavish a lot of love and recognition on the board member for opening that particular door and helping to raise what often ended up being a significant chunk of change.

Of course, identifying potential donors and helping to open the door is not the only way you should be engaging your board members in fundraising. There are so many ways for your board members to partner with you and be part of your fundraising team.

Let's look at the process of fundraising and how this allows you and your board members to find the most effective and comfortable ways for them to help raise funds for your organization.



## The Process of Fundraising

y first fundraising job was a long time ago. And fundraising wasn't a word that was used a lot. The word that I always heard was development. I wasn't considered a fundraiser, but a development director.

#### THERE ARE TWO THINGS THAT I REALLY LIKE ABOUT THAT:

- 1. The word development connotes a process and growth. We develop relationships in order to bring people and organizations closer to us, so they will want to invest in what we do.
- 2. The word "director" explained my role—as the person who managed the development activities of my leadership, be that volunteer or staff.

In order to do that, I needed to really understand the development process so I could deploy my staff and—more to the point--engage my board in fundraising. That meant that I had to work with and every one of them to find the places where they could be successful. After all, none of us likes to work at things where we have scant success.





My best advice, therefore, is to begin at the beginning. Start by making sure your board members understand that while there are many tactics you can use to induce people to give, fundraising itself falls into two larger categories: Transactional (or arm's length) or Relational.

## TRANSACTIONAL AND RELATIONAL FUNDRAISING

**Transactional fundraising is focused on right now and on the support you are hoping your prospect will give.** Typical transactional fundraising techniques include direct mail, social media, special events, and, yes, grantwriting. Much of transactional fundraising is staff driven, however there are ways that board members can help to make your transactional fundraising more effective.

For example, having a board member sign your end of the year appeal can increase your fundraising results. Having them use their social media to spread the word and sometimes even ask for support enlarges your world tremendously. And writing a letter of support to a funder, especially one where they know board members, can increase your chances of getting funded.

As you'll note, even though these are ways of transactional fundraising, your board member is most useful to the organization by leveraging his or her relationships. And again, don't just ask them to do something, hold their hand as they do it. Meet with them to plan the strategy, write the letter, draft the social media posts, and always cheer them on.

Relational fundraising is the way most money is raised. After all, people give to people. It's face to face asks, house parties or salons, those personal notes to friends, colleagues and acquaintances saying, "join me in supporting this amazing organization." For many transactional techniques, such as a gala or golf tournament, you will be working with your board to reach out to their circle of influence and the fundraising they do will be relational.





## THE RIGHTS OF FUNDRAISING

A definition I love says that successful fundraising is the right person asking the right prospect to support the right project for the right amount at the right time in the right way. Getting all those rights right happens because you follow the fundraising process of prospecting, cultivating, soliciting, and stewarding.

Note that, just as my sister and I are mirror images of each other—so are the steps in fundraising. The things you do, for example, to cultivate a donor are the same things you should be doing to steward them.

If each element in the fundraising process is a circle, it would look something like this illustration:







And the best fund-raising happens where the circles interest. Every conversation a board member has with a prospect is a way to prospect, cultivate, steward, and solicit.

We've already talked a bit about prospecting. Identifying and learning about those we have reason to believe have the capacity to make a gift at the level we are looking for, an interest in what we do, and a connection to our organization is the starting point for fundraising.

Once we know who, we have to figure out how to interest and involve them in our organization. This is called cultivation. It is also called stewardship. It is critical to understand the importance of stewardship to a robust fundraising program. The very best prospect for a charitable gift is an existing donor. But only if you have treated that donor well. And that is something, alas, too many nonprofits do not do.

## **GETTING DONORS, KEEPING DONORS**

In the United States, more than 60% of all first-time donors to an organization never make a second gift. Each year, 35% of donors who have made at least two gifts, drop off your giving map. If you could retain even 10% of those former donors, think how much more money you would have to push your mission forward.



When you cultivate and steward, you are both touching and moving your clients. Touching is where you reach out to your donors to say we are here. We're so glad you are here with us. Your support allows us to do so much—and we can only do what we do because of our partnership.

**Touches** include such things as newsletters, personal notes, thank you letters, invitations to events (but NOT when you are asking them to buy a ticket). They can also be meetings individually or in groups—where you talk about what is happening at your organization because of their support.

#### WHAT TOUCHES ARE NOT

Touches are not are asks. And, as you'll see, it is here where your board members can be most effective and will feel most engaged.

What touches are not are asks. And, as you'll see, it is here where your board members can be most effective and will feel most engaged.

**Moves**, on the other hand, are the things you intentionally do to get a donor one step closer to making this (first or next) gift. When you are engaged in a move, you are always talking about the gift you are hoping the prospect will consider. You are always talking about what their gift will accomplish, what it will cost, and why it will matter to them. The final move, of course, is the solicitation. And it is this step that most of frightens most of your board members.

In my many years of successful fundraising, I learned that if I cultivated correctly—and if the donor had been stewarded well over the course of his or her relationship with our organization—this was the easiest step. Board member who walked through the fundraising cycle with me several times all came to acknowledge the truth of that statement. Frequently, my prospects would solicit themselves! "This sounds great," they would tell me. "I'm in. I'll commit to a gift of...."





## **Turning Your Board into Fundraising Superheroes**

ften, when I am doing board trainings or retreats, I'll ask how many of them joined the board because they were excited by the thought of fundraising for this extraordinary organization. As you might imagine, I am greeted with a resounding silence.

I, on the other hand, fell into fundraising in the 1980s, and thought I died and went to heaven. What, it seemed to me, could be better than to meet with interesting people, learn about them, share things about my fabulous organization, and help them to do something that mattered to them.

I quickly learned that most people thought I was nuts—but I thought then and still think they were wrong. Think about it: there are many studies that point out that philanthropic people tend to be happier than those who aren't, and making a charitable gift actually brings a donor joy.

Give your board members the gift of making people happy and full of joy by helping them to become fundraising superheroes.





### **EDUCATING YOUR BOARD**

Getting them there means educating them. Make sure your board members understand that fundraising is so much more than asking. Go through the fundraising process (see above) and ask them what they think they could do to prospect, cultivate, solicit, and steward. Give them some ideas they might not have thought of.

Talk about the specifics of your fundraising program. Explain the ways you are raising funds, and then explore with your board members how they might be an asset. You know the culture of your board far better than I (at least, since I don't know your board at all, I hope you do—and if you don't, that is your number one priority).

Would this work best in a group setting or mainly via one on one conversations? Should it be a regular part of your board meetings, or would a 3-to 4-hour retreat serve the purpose better?

Whichever way you go, as board members let you know "I could do THIS," work with them to figure out what "this" looks like. And then keep up with them, ensuring that they are, indeed, doing this.



## **STARTING WITH STEWARDSHIP**

I, typically, started by focusing my board on stewardship. After all, it is so much easier to say Thank You than Please Would You Give. We would start small. At each board meeting I would bring a list of donors who had made a charitable gift (exclusive of buying tickets to an event or purchasing an item at a silent or live auction). The list included information on the gift and a little history. For example, it might note that this donor has been a regular donor for the past 5 years; never gave before; this is an increase over past gifts. Usually, I divided the list and gave each board member his or her names. Occasionally, I would go through the names and ask who knew whom, and ask those board members to "take" those donors.

Each board member would also get a stack of cards. These cards were the type that fold over. The organization's logo or an iconic picture would be on the front. Inside was blank. At the front of the room I would hang a flip chart that contained some language they could use — thank you so much for your ongoing support; Wow! Thank you for your first-time gift. This is amazing; I am so excited, (name), to be able to thank you for your generosity..... and three bullet points.



The purpose of this note, I would remind my board members, is to thank the donor for his or her generosity and tell them what their support will help us to do. The three bullet points were those things. This, of course, served two purposes: they were telling the donor about

potential impact, and I was educating my board members about the kinds of things we did. Then I would ask them to write the notes – now.

I never asked a board member to write more than five—though as time went on, some board members volunteered to do more. I also never, ever, not in a million

#### **REMINDER:**

Thank the donor for his or her generosity and tell them what their support will help us to do.

years, allowed them to take the notes out of the room. They would try.

"I'll write it tonight," they would insist. But, no they won't. With all the best intentions, those notes would remain blank. My joke was that they didn't get out of the room unless they handed me the handwritten thank you notes.



## **BEYOND STEWARDSHIP-AND MORE STEWARDSHIP**

I'll be honest. Some board members never got beyond this, but most did. They joined me and a prospect on tours—and eventually invited their friends to come and see first-hand what we did. They attended house parties, hosted them, and over time, hosted house parties where every other attendee was from their circle of influence.

At special events, I assigned each of them a period of time to be a greeter at the sign in table. Before the event, we did a lot of role playing on how to work the room (something most of them actually understood but had never considered doing for us)—and more importantly, to follow up after the event with those they greeted or met on their rounds.

Large and loyal donors were assigned a board steward. The job of the steward was to reach out at least twice a year to again thank the donor and to remind the donor of the importance of the gift that had been given. And no, I did not expect my board member to remember who they were stewarding, when they should reach out, or what they should do. That, remember, is the role of staff.

Yes, all this took me (and, at some organizations my team) an enormous of amount of time. But at the organizations where I did this, retention rates grew; annual gifts increased; and more of these donors moved up the giving pyramid, with a significant number becoming major donors.

Best of all, a few of my board members really did become fundraising superheroes. And they often became mentors to their fellow board members, leading the way to success.





## Engaging the Board in Year End Fundraising

hile we want our board members to be engaged with fundraising all year round, it is especially important at the end of the year. Many organizations raise more than half of their charitable revenue via their end of the year appeal. Overall, more than 30% of all charitable funds come in the last month of the year, and most of that comes on the last three days of the month.

How can your board members become committed fundraisers at the end of the year? In the same way you engage them all year long. Whether you have a robust end of the year campaign, where you are reaching out to your constituents in many ways and on many platforms, or are only intending to reach out once via a direct mail letter, do invite your board members to learn how you are going about raising end-of-the-year funds. And then, work with them to find out how they are willing to help.

For example, if you are sending out a direct mail, engage at least some of the board members go through the list of prospects and write personal notes. These can go along with the letter or, if more appropriate, as a separate corre-





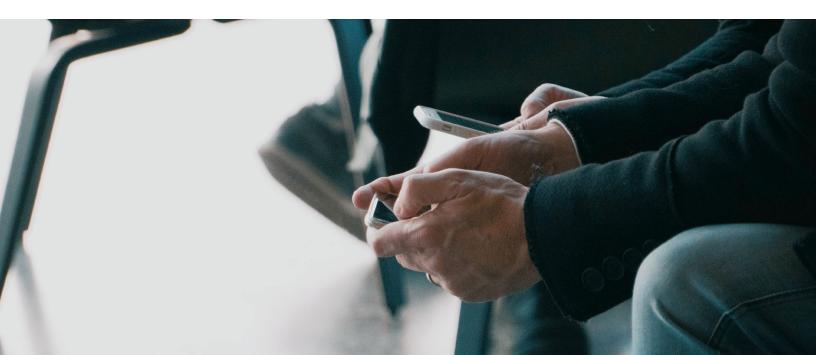
spondence. For existing donors, these board notes should thank the prospect for all they've done in the past and ask them to again join with the board member in supporting this amazing organization.

It can be very useful if the board member asks the donor to increase the gift by noting that "this year, I have made an increased commitment. I hope you will increase your annual gift also." If they are new prospects, then the board note could simply tell them how important their support will be.

In recent years, email has become an accepted means of reaching out, so having board members send emails directly from their account, telling their contacts that at this year's end, they hope that the person receiving the email will join with them in supporting the organization. A link to the donation landing page, of course, is prominently displayed in the email.

Texting, too, is becoming a fundraising vehicle. Whereas once I would have asked my board members to come some evening and make calls to those who have yet made their end of the year gift, the fact that most of us don't answer our phones unless we know who is calling has made that an exercise in only leaving messages. Messages that younger donors never listen to.

Several of my clients have had better responses by asking board members to text some prospective donors with a short message and a link to the landing page.



### **ENGAGING LARGER DONORS**

Where your board members will be of most use, of course, is with your larger donors. At the end of the year, as all year, they are the key to opening the doors to both individuals and organizations. They are the best people to bring prospects and donors closer to the organization. Through face to face interactions, by hosting house parties, or speaking at service or professional organizations, they can be fabulous ambassadors who let the audience know the importance not just of your work but of the support that donors give.

Perhaps most importantly in getting your board engaged in fundraising at year end (and the rest of the year) is ensuring that they are individual donors. That means that, beyond the support they may bring from their company, they should (also) be making a personal gift. The end of the year is a good time to remind your board members not just of their obligation but to consider the passion with which they support your organization and to make a gift that

reflects their passion. In this way, they can honestly say to others, "Join with me in supporting the important work we do."

Through face to face interactions... they can be fabulous ambassadors who let the audience know the importance not just of your work but of the support that donors give.



etting your board engaged in fundraising takes a lot more than simply telling them to do so. It takes educating them, having a plan for what they can do, facilitating them to do it, and most of all, it takes an organization with a culture of philanthropy.

Unless everyone at your organization believes that fundraising is key to ensuring the sustainability of your organization, fundraising will always be off to the side and not considered important. If it's not important, of course your board members won't want to engage.

Along with that culture, is your own personal culture of being an asset to your board members. As the person in charge of development, much of your job is working with and facilitating your board members' fundraising efforts. Of course, you need to have the right board members in order to do that well. And that means recruiting carefully so your members understand their roles. But even current members can be taught the importance of fundraising and what their roles could be.

While not every board member wants to be an asker, all can be part of the process, doing things that are comfortable for them. Teach them what fundraising truly is, and then work with them to find their sweet spot. It will be worth the time you'll take.

As you train them and help to develop individual fundraising plans, you will find that each of your board members, in his or her own way, can become a fundraising superhero and help your organization push its mission forward.





# Meet the Author

anet Levine of Janet Levine Consulting has worked with hundreds of nonprofit organizations taking them from mired to inspired. Janet focuses on working with staff and boards to increase fundraising capacity and build sustainability. Her philosophy is one of collaboration where together we develop and implement comprehensive programs that fit the needs and resources of the organization.

Prior to opening Janet Levine Consulting, she spent more than 20 years in the field. Beginning her development career at the School of Engineering at USC, Janet has also held senior advancement positions at the Reason Foundation, the University of Oregon, the American Film Institution, El Camino College and Pasadena City College. Just prior to opening Janet Levine Consulting in September of 2007, Janet served as Vice President of University Advancement at Cal State Dominguez Hills.

Her clients run the gamut from small, all volunteer organizations to large, national organizations. Of special pride is the number of clients who hire Janet Levine Consulting for follow on assignments.

In addition to her consulting practice, Janet regularly leads workshops in fundraising and board development across Southern California. She has taught in the Fundraising Certificate program at UCLA and facilitates four online courses (Get Grants, Introduction to Nonprofit Management, Marketing Your Nonprofit, and Essentials of Fund Development) that are available through libraries, universities and colleges in the US and overseas. She is also a sought-after presenter at professional conferences. She is also the co-author of Compelling Conversations for Fundraisers, available at Amazon, and this ebook, a free resource of Nonprofit Library.

For more from Janet Levine, visit her website.



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