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# How Board Members Become Successful Fundraisers

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# Goals for this Session

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- Understand what keeps board members from fundraising & way to address those barriers
- Review values, policies, and practices that support fundraising & create a culture of philanthropy
- Provide tools to support board fundraising

# How do board members look at fundraising?

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“It’s staff’s job to fundraise”

“I didn’t know I was joining a fundraising board!!!”

“We just need 1-2 big grants to support our needs”

“I don’t know anyone that could give money”

“I wouldn’t know how to ask”

“People don’t give to organizations like ours”

“There’s no money in our community”

# The Overworked Executive Director

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- 26% of EDs report they lack fundraising competency
- less than half of DD's say they have a strong partnership with ED

underDEVELOPED, national study of nonprofit fundraising, CompassPoint, 2012

# The Lonely Development Director

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- Only 42% of DD's have influence in setting financial goals
- 50% anticipate leaving their current job in less than 2 years
- Average tenure is 18 months

underDEVELOPED, national study of nonprofit fundraising, CompassPoint, 2012

## On Boards...

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- 3 out of 4 executives say board fundraising is lacking
- Less than half of DDs report having influence on board member participation
- 36% have board fundraising committees



underDEVELOPED, national study of nonprofit fundraising, CompassPoint, 2012

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## A culture of philanthropy? 41% lack this.

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Most people in the organization (across positions) act as ambassadors and engage in relationship-building. Everyone promotes giving and can articulate a case for giving. Fund development is viewed and valued as a mission aligned program of the organization.

“each volunteer and every employee feels it. Clients and donors recognize it whenever they connect with the organization” – Simone Joyaux, Strategic Fund Development

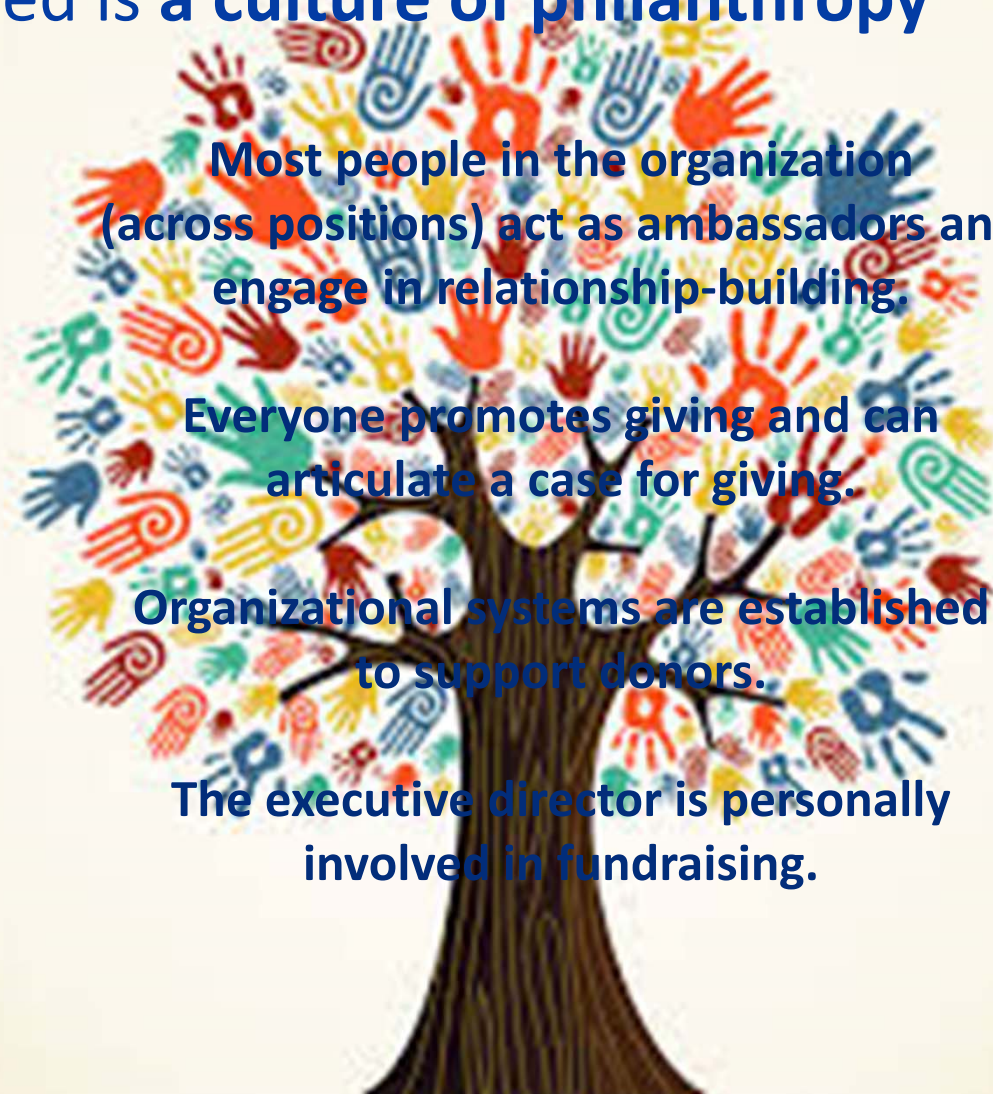
## What's needed is a **culture of philanthropy**

**Most people in the organization (across positions) act as ambassadors and engage in relationship-building.**

**Everyone promotes giving and can articulate a case for giving.**

**Organizational systems are established to support donors.**

**The executive director is personally involved in fundraising.**





# What Does Successful Fundraising Look Like?

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- Everyone who is a supporter can be a donor (clients, alumni, staff, board)
- Expect all board members to be donors (“amount significant to them”)
- Everyone has a role to play in fundraising – what is each person’s role?
- Everyone is valued & recognized for their contribution

# Board's Role in Fundraising

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- *Set fundraising policies*
- *Assist in creation/adoption of fundraising plan*
- *Give money*
- *Help raise money*

# So, Why Are We Afraid to Ask?

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## Some fears

- take 'no' personally
- confused who we are asking and what for
- “retaliation”
- won't know what to say
- will hurt my relationship

## One solution

A different way  
of looking at it!





The exchange principle

# Cultivation conversation: exercise

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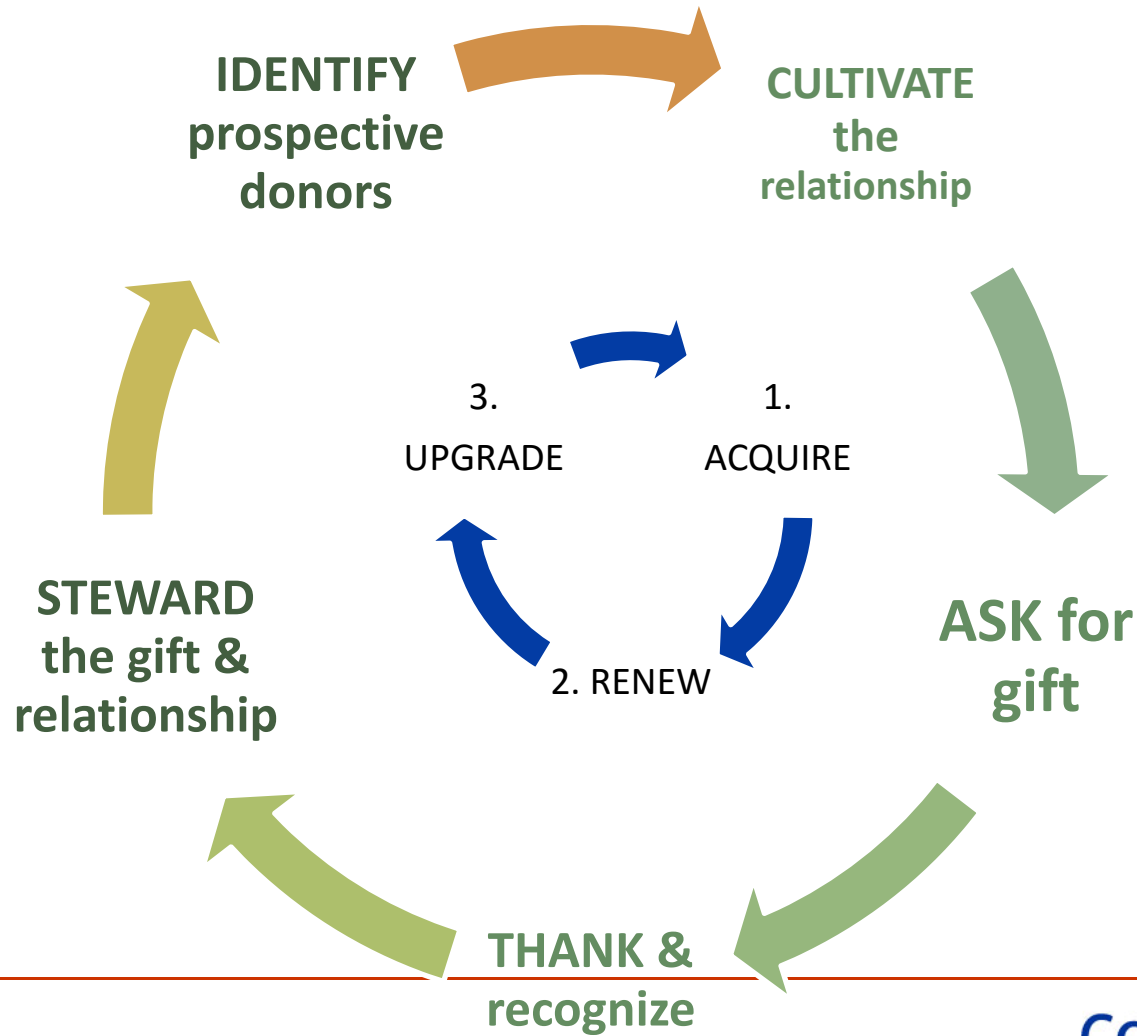


Interview in pairs; ask questions and **listen for what's important to that person.**

- **What motivates you to give time and money to a cause or organization?**
- **What groups/causes do you feel most passionate about?**
- **What do you hope to achieve when you support a group?**

# Sustainability of donors and gifts

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# Including Fundraising Expectations in Board Recruitment

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Two examples of Fundraising expectations in LinkedIn recruitment ad:

## **Fundraising**

*Board Members will consider the agency a philanthropic priority and make annual gifts that reflect that priority. So that our organization can credibly solicit contributions from foundations, organizations, and individuals, we expect to have 100 percent of Board Members make an annual contribution that is commensurate with their capacity.*

another:

Leverage personal relationships and connections to help the development committee and staff identify and solicit potential funders, as well as directly invest in Peace4Kid's work by making a personal contribution each year.

# What do you tell prospective board members?

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“The board also raises a percentage of our annual budget each year, and this year that goal is \$75k.

We work together in reaching this goal through asking our supporters to renew their annual contributions, and to introduce personal & business contacts to our work.

Not everyone asks people directly for donations... but everyone participates in the fundraising and makes their own financial gift at an amount that is meaningful to them.

**Is this something you can do if you join our board?”**



## Talents for Fundraising

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Project Management

Good Listening Skills

Enjoys Networking

Articulate re: Mission

Comfortable Talking About Money

Important to Match Talents with Fundraising Roles

# Which 1 of these talents do you have?

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1. **I am a great listener.** I listen deeply to what people think and feel.
2. **I love managing projects and people.** Getting things completed in satisfying to me.
3. **I'm a natural at networking.** I love connecting people to the right opportunities and interests.
4. **I'm a strong communicator.** It's easy for me to talk about what I am passionate about and why.
5. **I'm financially fit.** I'm comfortable with talking about our groups finances & what we need.

# How could each board member be **POWERFUL** fundraisers, by matching **STRENGTHS** to:

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Board member	Their strengths	Development role
Jordan	Great listener, well spoken about our mission...	Cultivation calls & send info to staff
Mazzi	Good with numbers, always comfortable talking about our finances	Join donor solicitation meetings when the donor cares about finances
Yee Won	Very organized, always gets things done...	Co-chair the annual event with staff
Jose	Has several social and work networks & mentions names of people in meetings...	Brainstorm new prospects with me

# FR Goals and people's actions are aligned

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Your fundraising goal is not a “magic number” in the budget.

Your strategies have months, weeks and days calendared.

Board members know how to plug into these strategies:

- FR committee
- Individual FR plans
- **Shared online spread sheet**



## Example: Shared spreadsheet online

Solicitor	Donor	Contact info	Most recent gift	Ask to renew	Status
Jordan	Rory Brown	213-555-8686 r.brown@gmail.com	\$250	\$250	1 <sup>st</sup> call 10/29/14; talked 10/6; confirmed!
Jordan	Jeff Pate	310-863-4098 jjsteasy@yahoo.com	\$40/ mo	\$50/m o	Emailed twice- wants to stay at \$40/mo
Mazzie	Vera Angeles	Look up new # vavavom@steasy.net	\$1,500	\$1,500	Agreed to meet; 11/8/14
Mazzie	Mike Cashmore	310-933-4098	\$1,200	Upgrade \$1,500	10/28/14: asked to talk in December
Mazzie	Gigi Ong	Do not call- Gigio@comcast.net	\$500	\$500	Cannot reach; HELP!

## Communication

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## Accountability

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### You/board leader

- Clear expectations @ recruitment & renewal
- Gives plenty of notice & ample support to be participate
- Checks in by group and 1:1 on progress
- Communicates successes AND challenges

### Board member

- Understands and agrees to FR expectations
- States what they can do and what support they need
- Sets aside the time to get things done, responds to check ins.
- Shares what worked or didn't work

# What conversation about **accountability** do you need to have?

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# What Additional Help Do Board Members Need to Lead & Participate?

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Clear job responsibilities & realistic expectations  
(board orientations & contract)

Up to date & useful information  
(fundraising plan, case statements,  
and progress reports)

Ongoing training and support

An ongoing mission –  
fundraising connection





# Resources

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- Board Café- [www.BlueAvocado.org](http://www.BlueAvocado.org)
- Grassroots Fundraising Journal, [www.grassrootsfundraising.org](http://www.grassrootsfundraising.org)
- UnderDEVELOPED report [www.CompassPoint.org](http://www.CompassPoint.org)
- Bright Spots in Fundraising Report [www.haasjr.org/resources/fundraising-bright-spots](http://www.haasjr.org/resources/fundraising-bright-spots)

# Thank You!

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## -upcoming CompassPoint workshops

- **Create and Effective Fundraising Plan 5/25**
- Building Successful Boards Part 1 5/26
- Working Across Differences for Org Change 6/17
- Recruit the Board Your Org Needs 7/15
- Clinic for Nonprofit Sustainability 7/14

All workshops listed at  
[www.compasspoint.org/workshops](http://www.compasspoint.org/workshops)



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