
How Board Members Become Successful Fundraisers

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Goals for this Session

- Understand what keeps board members from fundraising
- Review values, policies, and practices that support fundraising
- Provide tools to support board fundraising

How do board members look at fundraising?

“It’s the role of staff to fundraise”

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

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

“We just need a couple heavy-hitters on the board”

“I wouldn’t know how to ask”

“People don’t give to organizations like ours”

“There’s no money in our community”

What Keeps Board Members From Fundraising?

- ✓ They don't understand the importance of taking the leadership role in fundraising.
- ✓ They are afraid to ask for money.

Kim Klein

The Overworked/Underdeveloped Executive Director



- 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



- 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...

- 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

A culture of philanthropy? 41% lack this.

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 Does Successful Fundraising Look Like?

- 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

Elements of Successful Teams

- **Strong leadership**
- **Clear expectations**
- **Everyone has a role to play**
- **Everyone is valued and recognized for their contribution**
- **Everything is documented and reviewed**
- **No one is talked into being on the team**
- **Everything has a beginning date, goals, objectives, and an end date**

Team Leadership in Fundraising

- Typical Team: a few key board members, staff members and non-board volunteers who motivate and coordinate the work of the organization.
- Essential members: Board Chair, Fundraising Chair, Executive Director or Development Director.

- Team Based Fundraising Step by Step,
Carlson, Clarke, 1999.

Board's Role in Fundraising

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

So, Why Are We Afraid to Ask?

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



Donors give money to organizations to do work that they cannot do.


AND

Organizations offer social value to donors in several ways

Exchange principle



What donor
really cares
about



Social value
created from
your orgs work

Cultivation conversation: exercise



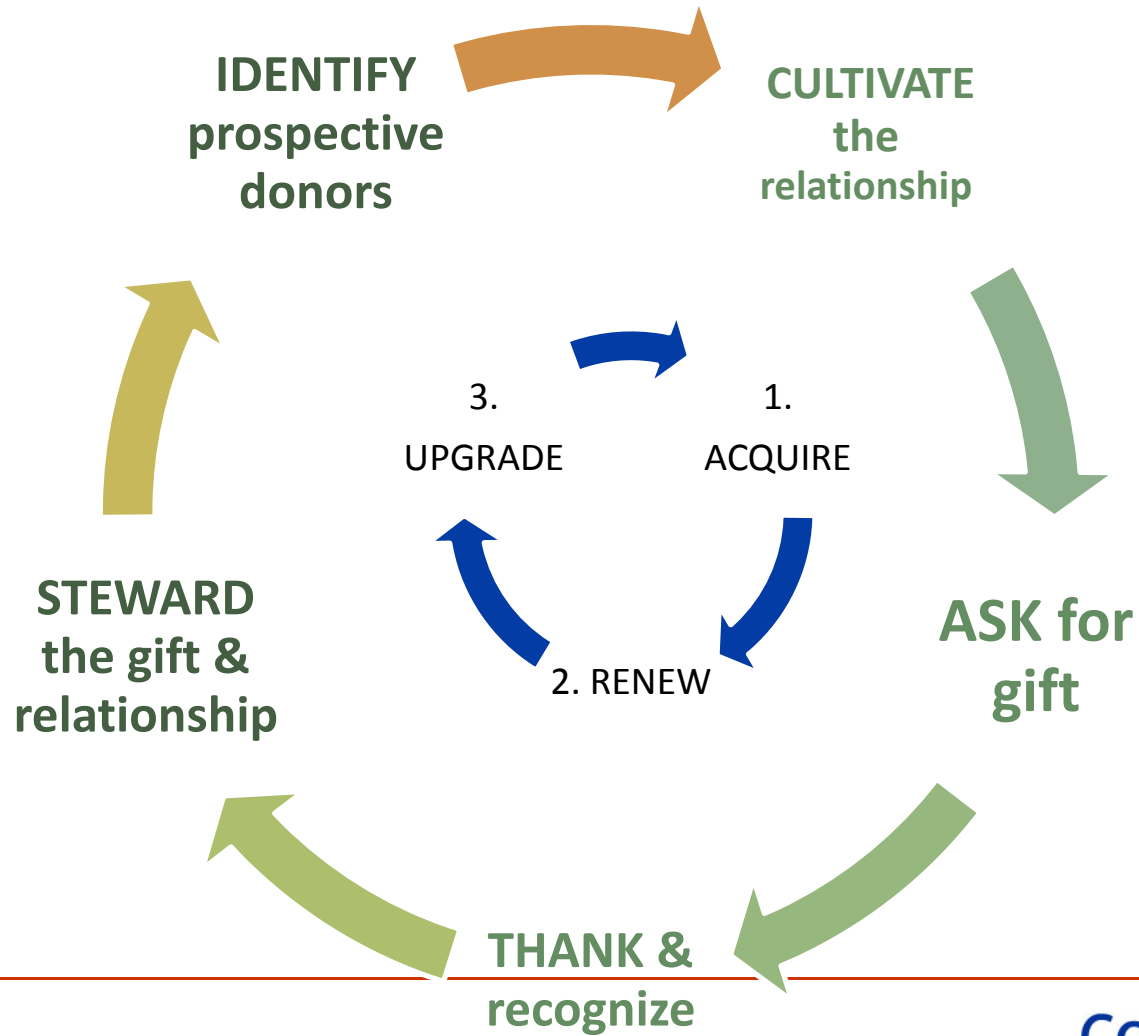
Interview in pairs; ask questions and **listen for what's important to that person.**

- **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?**

Tools for Board Members



Sustainability of donors and gifts



Case Statement

All the Information We Need to Ask for Money

Mission: The “Why”

Goals: The “What”

Objectives: The “How”

History – track record
(timeline)

Structure- The “Who”

Budget – “How Much”

Making the Case for Support

We believe...

...and we do this by...

Use “we”,
“you”, “us”
and “I”

Stories

Consistent

COMPELLING

Concise

A good story connects values, hopes and aspirations.

Finances

1. What does it take to do the current work you do? How close are you to reaching this?

“Every year we raise 1.5 million to help people like Mary get their own house- and we are 75% towards reaching our goal.”

2. What sources (in general) make up your income?

“Individuals who give \$100, 500, 1,000, and more comprise almost half of the dollars that we need every year.”

- ***Asking levels – List them***

Talents for Fundraising

Project Management

Good Listening Skills

Enjoys Networking

Articulate re: Mission

Comfortable Talking About Money

Important to Match Talents with Fundraising Roles

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

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



Thank You!

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