

Involve the Board, Staff and Other Volunteers: Partnering to Achieve Success

- Establish an institutional culture that supports the idea that fundraising is everyone's responsibility. This important task cannot be delegated to any one person or a committee.
- Find out what motivates people.
- Determine the right job for the right person.
- Fundraising is more than just asking for money. There's also identification, research, cultivation, acknowledgment and stewardship.

Why don't boards fundraise?

- Because new members have not been told that they have fundraising responsibilities, which include making a contribution.
- Fundraising is viewed as an "either/or" responsibility rather than an "and."
- Training is not provided for those who want to learn fundraising skills.
- Staff does not secure "buy in" for the fundraising plan.
- Staff does not provide adequate back-up support (technical, logistics, data, information, written materials, etc.)

Role of Nominating/Board Development Committee

The board recruitment process is a key step in creating a fundraising board. The nominating/board development committee supports fundraising by:

- Understanding and conveying the importance of each board member taking an active role in fundraising to achieve the organization's goals.
- Demonstrating personal leadership and enthusiasm for fundraising.
- Communicates clearly with potential board members about the fundraising expectations of the board. This includes *“Our annual budget is \$725k this year, and our board and staff raise \$125k of this from individual donations. We do this through a combination of direct asking and group events. Every board member participates through in this team effort and through their own personal gift.”*
- *Giving* – a personally significant gift. Everyone commits to making a donation amount that is significant for their giving (ie, the largest donation they make, an amount that they ‘stretch’ for). This approach increases respect for diversity of the group and respect for each gift.
Getting – participating in the development/fundraising process. Everyone doesn't have to do the same thing, but everyone participates in some of the fundraising activities each year and helps to reach a group goal in the budget.

Fundraising Activities take place in both the ‘Governance Role’ and the ‘Support’ Role of Board Members

Governance Role (as a group)	Support Role (as individuals)
Ensure the development of a fundraising plan	Make a monetary donation
Monitor the progress of the fundraising plan. Consider action if FR performance exceeds or falls short of goal.	Offer your skills to help implement the fundraising plan. (ie, donor list development, writing materials, holding small gatherings)
Ensure that donations are acknowledged promptly and appropriately.	Ask others for money.
Ensure that cash and in-kind contributions are documented properly.	Help obtain donated goods of real value to organization
Establish consistent fundraising practices at the board level.	Personalize all organizational fundraising efforts. Add a note, make a call with fund appeals.

Fundraising Roles of Board & Staff

Board Responsibilities:

- Set fundraising policies
- Make your own gift to the organization in addition to soliciting other donations
- Ask others for contributions, including potential major contributors; solicit them
- Open doors for staff members to make their solicitations
- Take on special fundraising projects and make them successful
- Become passionate spokespersons for the organization
- Add personal notes to letters mailed by staff members

Shared Responsibilities

- Cultivate current and prospective donors
- Plan fundraising activities for board and staff
- Plan and implement special events
- Add names to mailing lists for staff solicitations
- Make presentations to potential donor groups
- Acknowledge the generosity of donors

Staff Responsibilities:

- Draft plans and recommend reasonable goals
- Draft the case for investment and talking points
- Research current and prospective donors
- Prepare proposals and direct mail solicitations
- Provide the board with necessary materials for their solicitations
- Manage fundraising logistics

Matching Talent and Strengths to Fundraising Tasks

It's important to offer fundraising "skills building" to everyone, and some people will be better matched to certain roles and tasks than others. People may find more satisfaction and comfort in doing things better suited to their natural talents. Use this tool to make initial assignments of tasks when creating your fundraising team.

Talent	Identify prospective donors	Cultivate donors	Solicit donors	Thank donors	Major gift solicitor	Organize events
Good at and likes networking, meeting new people	X			X		
Articulate and passionate about the mission & impact		X	X	X		
Comfortable with people and money			X	X	X	
Well organized, detail oriented				X		X
Your Board Members:						