

Board Fundraising That Works

By TERRY AXELROD

Think about the best experience you've ever had being a board member or volunteer of a non-profit organization. It seemed like whatever you did just worked brilliantly. It never felt like anyone was taking advantage of you. You felt completely appreciated from the get-go. In fact, they showered you with nice notes and appropriate little goodies. They took into consideration your other time commitments. They included your family in various activities.

In a nutshell, they honored your time and talents, gave you a fun and challenging assignment, and supported you with great staff to have you and the project be successful. They showcased your strengths and had others magically available to cover for your weaknesses.

You still have a warm feeling when you think about it.

It's the Golden Rule of working with boards and, too often, it goes without saying: Treat your board members as you would want to be treated. Be even nicer to them than you're already being. Make this the single best volunteer experience they've ever had. Treasure them as the lifelong friend and supporter they will become. Speak to their most noble and generous qualities. Keep reconnecting them to your mission.

Check Assumptions

Now, check out these assumptions about the realities of your board:

Someone in your organization (most likely you) spent a lot of time recruiting each board member. You identified the categories of expertise needed: human resources, real estate, finance, fundraising, etc. You diligently courted each potential board member, checked them out thoroughly, and then popped the question. You were thrilled when they accepted.

You had them read over your written agreement of expectations for

board members: number of meetings to attend, serve on a committee, etc. You made sure they digested all the fine print about their fundraising responsibilities. They signed off on the deal.

Susan, the CPA, your fresh and eager new board member, arrives at her second board meeting. One of the main agenda items is, of course, fundraising. It just happens to be the time of year for the big annual banquet, golf tournament, or the annual fund drive.

Before she has even gotten oriented to the basics of being on the board, Susan is being asked to do the part she most dreaded. Yes, she did know this was coming, and she did agree to help. So she takes a deep breath and scans her address book for her 10 closest friends or colleagues who she knows can't refuse. After all, she's helped them in similar times of need.

Let's stop here, for a minute, and reflect on how it feels to be on the receiving end of one of Susan's asks. In most cases, the person cannot say no. Their relationship with your board member, whether professional or personal, would make it very awkward to refuse. Yet as soon as Susan goes off your board, they stop giving.

Not that it was a bad organization. On the contrary, they were probably doing very great work. Had the organization taken the time to educate and cultivate Susan's friend personally, she could have become a lifelong supporter in her own right. But that did not happen. In the eyes of the organization, this donor was Susan's friend, so they left her alone, not wanting to intrude.

In terms of their love of fundraising, your basic random sample of board members pretty much mirrors the basic population. In other words, fundraising is just not everyone's bag.

The same folks who may be brilliant at strategic planning or human resources, may not have the bug for



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A dynamic, sought-after speaker nationally and internationally, Terry's high-energy trainings take the fear out of individual fundraising and give participants a practical, do-able system for long-term financial sustainability.

Benevon trains and coaches nonprofit organizations to implement a mission-based system for raising sustainable funding from individual donors. This system ends the suffering about fundraising and builds passionate and committed lifelong donors.

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Board Member Roles

As many of us have learned the hard way, pressuring board members to do fundraising just doesn't work.

They may say they'll make those three calls, but never seem to get around to it. Or their attendance slacks off at meetings and eventually they withdraw or resign from the board feeling guilty, inadequate, and frustrated.

Take heart! There is another way—a way to keep everyone happy and still have a successful, robust fundraising program. In our Benevon Model for building a sustainable funding, there are three roles for board members.

They are:

- ▲ Inviting people to introductory events
- ▲ Personally thanking donors for gifts
- ▲ Giving money themselves

— Terry Axelrod

fundraising. You didn't initially recruit them for their fundraising expertise.

On the other hand, there is that portion of the bell-shaped curve that actually enjoys asking others for money. Those are the folks you recruited intentionally to fill the fundraising slots. You put them on the development committee.

At the proper point in the fundraising/cultivation cycle, these folks will be of great help. But not until your potential donors have been personally introduced to your good work and have become more involved.

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Let's look at each of these roles:

I. Inviting People to Introductory Events:

Regardless of their personality type, whether introverts or extroverts, we can assume your board members signed on because of their commitment to your mission. At a minimum, they should be excited enough about what you're doing to invite a few friends and colleagues to come and check the place out. Take a tour. Come to a little box lunch dog-and-pony show presentation or a reception or dessert at someone's home. No solicitation will be made. It's just to come and find out—to help you spread the word.

Set it up with an easy enough structure so that it's a no-brainer for the

board. Help them come up with their invitation list. By when will they: Make the calls? Do their personal reminder follow-up calls? Offer to drive the person to the gathering? Or perhaps they'd like to open the door by extending the initial invitation and have you or another staff member follow up.

It's your job to take it from there, if needed. Give their friend the royal treatment. Show them around, talk with them at length. Get their thoughts and advice. Then call the referring board member to give them the great feedback. They'll be delighted that the person showed up and truly enjoyed it.

Finally, at your next board meeting, hand out a list of everyone who attended an introductory event the prior month, with the name of the board member who invited each of them. Not only does it give the person a little recognition, it lets the others see the guest list, which is also very helpful for overlapping contacts. The second board contact can put in a good word the next time they run into the person.

II. Thanking Donors for Gifts

When was the last time you received a personal thank-you call from a board member for your contribution? You would definitely remember.

Not that it has to be a big deal. A simple voice mail message over the lunch hour will suffice. "Hello, my name is Sharon or Dave X. I'm on the board of the Association for Blind Students. I'm calling to thank you for your generous donation last month. We truly appreciate it." End of story.

In most cases, if your board person times it right, they won't even have to speak to a real donor. They can just leave upbeat, truly-appreciative voicemails. If, heaven forbid, a real person should happen to answer the phone, it will most likely be a friendly real person. They can have a nice, brief conversation and learn what compelled the donors to give.

At the next board meeting, have the board caller report on their calls. Let them share any anecdotes. They will look good to their fellow board members. It will inspire others to sign up for thank-you duty the next month. Stick with this every month for a year and your repeat

donations will increase. And your board members will feel much more involved with your fundraising program.

III. Giving Money Themselves

That's right. In this model, each and every board member must make a personal financial contribution. They can't hide under the corporate gift or beg off, saying they brought in thousands of dollars from others. Though those are well and good, they don't substitute for a personal gift. You've got to be able to tell your community that "100 percent of our board gives."

Having said that, I do not recommend setting a minimum. It tends to be a leveler for the folks with larger capacity. And it can be offensive to the folks with less capacity.

At the appropriate board meeting, have the chair of your development committee say something like: "It's that time of year, the time when we ask all of our supporters to make their annual gift to the organization. As you recall, we each agreed when we joined the board to make a personal contribution annually. Please be thinking about the gift you'd like to make. Over the next week or two, I will be giving each of you a call to discuss your gift."

At that same board meeting, you might want to give them a copy of your standard pledge card, specifying the giving levels you have adopted. It will be a good take-home reminder of the call they will soon receive.

If you adopt the Benevon Model, I think you'll see that it honors the unique contribution of each board member without pressuring anyone. It treats your board members as the lifelong supporters you want them to be. It keeps them in touch with your mission and feeling good about being involved with you. It treats them the way you would treat any other potential major donor—the way you would want to be treated. It's the Golden Rule. ■

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