

How to Manage & Inspire your Nonprofit's Board

Recruit and train your board members
to embrace fundraising



Nonprofit Boards Are a Lot Like Families

We don't always get to choose them, we have to figure out how to live with them, and sometimes, we can be a little dysfunctional.

Kidding aside, your board of directors plays a pivotal role in an organization's success. These volunteer leaders set a nonprofit's strategic direction, manage its finances, and provide governance oversight. Not an easy job.

Board members also hold an invaluable role in an organization's fundraising efforts. Their support (whether in time or dollars) affects donor behavior and determines a development team's job satisfaction and likelihood for success. Simply put, a board can make or break an organization's fundraising program. And research shows most boards need work.

In a recent [BoardSource study](#), CEOs were asked to grade their organizations' board of directors in 10 different areas. Fundraising received the lowest score.

Fundraisers also aren't happy with board performance. The [UnderDeveloped Report](#) found that 30% of development professionals who were planning to resign cited problems between them and their board as the key reason for their departure. Many nonprofit leaders regard this report as an indicator of the impending workforce crisis in the fundraising profession.

Houston, we have a problem. I think this problem can be broken down into three parts:

01 How board expectations are set (or not).

02 Who's recruited for a Board and how they're invited to serve.

03 How nonprofits train, manage, and hold board members accountable for their fundraising responsibilities.

This eGuide is designed to help you tackle this problem head-on. It offers tips and tools you can use to establish, educate, and empower a board that fully embraces fundraising.

PART ONE

Setting Expectations

Before you start recruiting new board members, it's essential that you answer this question: What do you want the board to do for your organization?

I encourage you to take the time to develop a job description that outlines exactly what you expect from board members in terms of time commitment (number of meetings during the year and length of term), meeting and event attendance, levels of involvement, and fundraising activities. Vague statements like “play an active role in fundraising” will leave expectations up to the imagination and likely lead to you not receiving the fundraising support you need.

In your job description, specify the level of gift you want board members to make as well as the type of fundraising activities you would like them to do. This description can be tailored based on their availability and comfort level. The point is to be as clear as possible when describing the fundraising role you need your board members to play.

Sample Board Job Description (Adapted from BoardSource)

Overview of Responsibilities of Board Members

The board of [ORGANIZATION] is responsible for overseeing the mission and purpose of the organization. Its duties include participation in strategic planning and making policy decisions, then securing the financing for them and the monitoring of their execution. Members must be willing to attend the requisite meetings, follow through on commitments, and participate fully in the decision-making process.

The board also presents the organization's image to the community and solicits its support in achieving XYZ's goals. We expect our board members to sign up for a ___-year term with up to ___ consecutive terms allowed, for a total of ___ years.

Specific Responsibilities

Fiscal

- Review revenues and expenses on a quarterly basis to ensure the mission of the organization is being upheld.
- Participate in strategic planning and the setting of long-term goals.

Legal

- Act on behalf of the organization and its interests, putting aside personal concerns, affiliations, or constituencies.
- Set procedures and policies to ensure that any affiliate is organized and administered in a manner that is in compliance with applicable law.

Ambassadorship/Fundraising

- Promote our mission to increase visibility and encourage financial support for the organization. This can include participating in fundraising events, stewarding donors, and/or sharing your personal story of involvement within your networks.
- Each board member will give a personally generous gift within his/her means on an annual basis as a sign of commitment to the organization and as a sign of respect for the other board members and donors who support the organization.

OR

- Each board member will be responsible for giving and getting a total of \$X annually, composed of a personal gift and either donations from their network or supplemental funds from their own charitable dollars.
- Be willing to make introductions to new networks, corporate sponsors, foundations, and helpful individuals.

Staff

- Hire the chief executive and review performance annually.
- Be willing to use individual expertise to assist in staff organization and development.

Specific Responsibilities

Performance

- Attend and be active in X out of the X scheduled board meetings each year (in person or via phone).
- Sit on at least one committee, and a board member will be asked to lead each of our committees (OPTIONAL: LIST COMMITTEES).
- Assist in selecting new board members who will help the organization achieve its goals.
- Actively participate in annual board self-evaluation.

PART TWO

Recruitment & Orientation

Creating Your Dream Team

Now that you know what you want your board members to do, close your eyes and visualize your organization's ideal board. How does your organization's current board align with that vision? Need more clarity? Ask yourself these questions:

- How does your board perform now with fundraising? Do its members make philanthropy a priority?
- Do term limits help or hinder the productivity of the current board?
- What kind of board member will offer better access to potential major individual and institutional donors?
- What skills and expertise do your board members need to guide your organization over the next few years?

The next step is finding your ideal board members. Start with your current board members and their networks. Next, look at your donor base and identify a few major donors or prospects who could be good candidates or can introduce you to one. Finally, you may want to post a call for board members on LinkedIn to reach outside your traditional connections.

How You Ask

I love that Penelope Burk refers to board recruitment as “hiring,” because it sets the expectation that being on a board is a job that people want and are committed to taking on with passion and enthusiasm.

The **first step** is to ask your governance committee to draft a list of prospective new board members and share it with the rest of the board for review. Similar to a hiring process, it's a good idea to recruit multiple candidates for each opening. This approach offers the opportunity to pick and choose the best people for the job.

You should also give prospective members a board recruitment packet that includes information about your organization's programs, finances, staff, and leadership. One of those resources should also outline your expectations for board service.

Next, ask the candidates to complete an application for board membership. Set a firm deadline for receiving the application. It's an easy way to see if they are willing to complete a task for you on a certain timeline. Be sure to include questions in the application that offer candidates a chance to share how they view volunteer leadership and, more important, the unique role they can play in meeting your organization's needs.

Interview prospective members is a must-do. You can learn more about them, answer any questions they have, and ,most important, get a glimpse into what working with this person will be like. During the interview, ask yourself:

- Will this person be a team player?
- Will his/her personality complement the current slate of board members?
- Is he/she fun?

The answers to these questions should help your team select the best candidates to join your organization's board.

PART THREE

Training, Managing, and Setting Up New Board Members for Success

Hosting an in-person orientation for new board members is an invaluable experience for both you and them. The ideal orientation has two key parts:

Organizational Overview

The first part is a comprehensive overview of your organization's mission, vision, strategic plan, programs, and finances. Encourage new board members to visit your offices to see your work in action and to meet your program leaders. These experiences will help them become more effective advocates (and fundraisers) for your organization.

Fundraising Overview

The second part of the orientation should focus on fundraising. To start, offer information about fundraising trends and best practices to help demystify the field and help new board members see their role within your fundraising efforts. Consider pairing a new board member with a current one who can help them settle into their new governance role.

I also encourage you to share your annual Fundraising Plan during the orientation and at the start of every fiscal year. Reading this plan will help board members identify how they can be involved in helping the organization reach its fundraising goals.

Also, develop a menu of ways board members can engage, solicit, and thank donors and champion your organization. Ask each of your board members to commit to a few activities they can complete during that year.

This two-part approach brings your new leaders into your work right from the start and sets them up for a successful tenure. After the orientation, it's important for you to set expectations for the specific role you want each board member to play. Ask them to review the job description and time commitment expected and offer feedback. Confirm the level of support they will need from the staff to fulfill their role most effectively.

Boards and Fundraising: The Role Every Board Member Can Play

In my experience, there isn't a Board that doesn't groan when the topic of fundraising comes up. Board members often consider fundraising one piece of an organization's fiscal health. When it comes to rolling up their sleeves and getting involved in it, they suddenly disappear.

This happens for three reasons:

1. Board members may think that soliciting gifts is the only way to fundraise

To debunk this myth, explain the different roles board members can play in fundraising.

Some board leaders are ambassadors who cultivate connections and introduce new people to an organization. Some can be connectors to their networks and bring other donors to you. Some may enjoy being solicitors and asking potential and current donors to invest in your work.

Finally, all board members can and should be stewards of your donors. Board "thank you" calls, for example, have an incredible effect on donor retention.

Tips: Build time during every board meeting for member to write "thank you" notes and regularly assign calls to board members to thank your donors. And the next time your board balks at calling or writing to a donor show them this graphic:



2. Your board needs help talking about your organization and why it deserves donor support

This may seem strange given the assumption that board leaders are the real “insiders” of an organization. However, board members may be wary of fundraising if they weren’t given a good orientation when they started or aren’t provided regular updates about your organization’s latest successes, challenges, and opportunities.

Tips: Give every new board member an in-depth orientation that includes fundraising training. Kick off each fiscal year with a refresher orientation to ensure that all board members really understand your work and how to ask for support. Create standard talking points and an “elevator pitch” so everyone is literally speaking from the same hymn sheet.

3. They fear rejection.

Who doesn’t, right? Board members may feel that fundraising is “begging,” or that they’ll make a prospective donor uncomfortable or caught off-guard. Here’s a little secret: If you’ve trained your board members to exude passion for your mission, they’ve made their own personal financial commitment, you’ve cultivated the prospect, and brought that board member into the process well before the ask, there’s no question you will get a yes. It’s a lot like dating. If you propose to someone on the first date, your chances of getting accepted are pretty unlikely.

Tips: Ask board members what’s holding them back from talking about your organization or feeling comfortable soliciting a gift. How can you allay their fears? Coach the board member on the fundraising cycle and what they can do to ensure a potential donor eventually says “yes.”

A simple way to make fundraising feel doable and fun for your board is giving them turnkey tools and templates like social media posts they can copy and post on their social platforms.

Development Committee—Do You Need One?

The simple answer is yes. Part of creating a culture of giving starts with volunteer leaders feeling committed to fundraising. A development committee provides a meaningful way for leaders to provide strategic oversight of fundraising and serve as a good example of fundraising engagement for the rest of the board. Here are three different committee options that may work for your organization:

Tips: Staff-driven fundraising planning is key here. Map out costs and anticipated revenue, and make sure your plan is clear and achievable. Share the draft with your finance and development committees or chairs to get feedback and buy-in.

Here are three development committee options:

Committee Option 1: All Board Members

Your development committee can be composed entirely of board members. This can be useful in garnering strong levels of engagement throughout the entire board. The downside is that your board members may get burned out quickly, distracted with other board committee service, or lack the interest or skill set to take this hands-on approach to fundraising.

Committee Option 2: Blended Membership

Another alternative is to include non-board members who are prospective board candidates, those with incredible capacity/networks but who don't want to serve on the board, and/or past board members that want to remain involved in the organization.

This allows you to involve a broader network of volunteers, which can also help you identify future potential board leaders. If you choose this blended model, development committee chair should be a board member who provides reports during each board meeting.

Committee Option 3: No Development Committee

Sometimes organizations just don't have a development committee at all. This is not an ideal situation, but board transitions, burnout, or other internal issues can get in the way of retaining successful volunteer leaders.

In this case, the development director or executive director will need to drive fundraising strategies and priorities for the board and work with board leadership to identify the next committee leader from the current slate of board members, major prospects, or donors you'd like to become more involved.

Reporting Fundraising to Boards

Fundraising needs to be an agenda item during every board meeting. And I don't just mean an update on fundraising goals. Focusing only on the dollars raised encourages the board to only consider transactional relationships with donors (asking and giving). We know this isn't a donor-centered approach. To shift this conversation, share metrics such as:

Donor Retention

- Total number of donors: Are you maintaining at least that same donor retention rate next year?
- Total number of new donors to find: In thinking about your growth strategies, what ways can you acquire at least as many new donors as you did this current year?
- Total number of lapsed donors: What can you do next year through communications and outreach strategies to bring back some of your lapsed donors?

Giving Levels

- Are the giving levels of your donors increasing, decreasing, or staying the same? Try to track donors by various gift ranges (\$1-\$249, \$250-\$499, \$500-\$999, and so on). You can see where to focus attention on upgrading maybe through increased donor communication or staff/Board outreach.

Donor Engagement

- How are you engaging your donors now? What's working and what's not? How can the Board be involved in building relationships with your donors?

Donor Engagement

- Is 100% of your board giving? They should be.
- Are they all giving at the level you set in your expectations? If not, why not?
- Is 100% of your board involved in some form of fundraising? They should be.

Windmill Hill Consulting can help you develop your own plan to engage your board fundraising. Through facilitated trainings we can demystify fundraising so they find the role that's right for them. We can also work with you to develop the tools and reports to put the plans into action.

Board Meetings: 9-Step Timeline for Staying on Track and Engaged

Much of a nonprofit's key fundraising work actually happens during board meetings, so they need to be as efficient as possible. Here's an easy-to-follow timeline to help you plan and execute effective board meetings that keep your board engaged and on track. This timeline is based on monthly meetings, but it can be easily adapted for quarterly meetings.

24 Hours After the Board Meeting: Distribute Meeting Minutes

Even the most accurate minutes lose their impact weeks after the meeting. Highlight strategic action plans and who will serve as lead for each item.

26 Days Before the Next Board Meeting: Prepare the Agenda

Use a template that includes your standard board meeting procedures. Follow the STARS method:

- **Specific:** Define each agenda item in terms of its intended outcome.
- **Timed:** Each agenda item should have a realistic assigned period of time
- **Actionable:** Each item should initiate a definite action as a result of the meeting discussion.
- **Relevant:** Each agenda item should be relevant to the whole board, not just one or two members, and the organization's mission.
- **Shared:** Provide board members with a copy of the agenda in advance so they can be prepared.

24 Days Out: Review Action Items and Follow Up

Reach out to the person assigned to each action item with a friendly reminder, offering direction and support. If you receive no response, send another reminder of the action steps with the notice of the next upcoming meeting, requesting a status update. Being specific on your follow-up increases the likelihood of its successful, timely completion.

18 Days Out: Update Key Staff on Board Decisions, Discussions, and Future Plans

Engaging staff with appropriate, relevant board discussions can result in unique insights that only those on the front lines of day-to-day operations can provide.

11 to 13 Days Out: Meet with the Board President

Do this prior to finalizing the agenda. This gives you time to discuss priorities, provide status updates on action plans, and exchange ideas and observations without the limitations of a formal full-board meeting.

10 Days Out: Prepare Meeting Packets

Include previous board meeting minutes, an agenda for the upcoming meeting, financial documents, committee reports, and any relevant data on the organization's performance, key functions, and current opportunities.

7 Days Out: Distribute Agenda, Reports, and Meeting Reminder

Include any reports, financial statements, or research to be discussed during the next meeting.

During the Board Meeting: Stick to the Agenda

Prioritizing agenda items and staying within allotted timeframes keeps board meetings focused and productive. When things start to move off topic, find creative ways to steer the discussion back to the agenda.

Keep everyone engaged by making sure every person has an opportunity to contribute. Talking and listening should be equally encouraged, while relating comments and recommendations into the context of the meeting.

Also, be sure to recognize the individual and collective contributions of the board at each meeting. Exceptional contributions and achievements should be recognized appropriately with thank you notes, small gifts, or commendations.

Also: Take Thorough Meeting Minutes

Obviously, the more accurate and detailed your meeting minutes, the more effective the outcomes. In addition to recording meeting details, incorporate a consistent method of identifying action items and the person delegated to complete them. Using a highlighter or colored/bold font for particular action items is a simple but effective method to ensure they are easily referenced later.

Board Performance—Measuring Progress, Setting Limits, and When to “Bless and Release”

How Are We Doing?

After you’ve “hired” your dream board, performance evaluation is essential. It helps the board reflect on their collective and individual performance and helps staff identify where their volunteer leaders may need more support or direction. Encourage your governance committee to have each board member complete a self-evaluation. Review the results as a group. If improvements are needed, ask the board members what they need in terms of resources and staff support to do a better job next year. As Peter Drucker, the great management guru, once said, “What gets measured gets improved.”

Term Limits

One of the most important expectations for board members is their length of service. Board members are very busy people, and we want to be respectful of their availability. That’s one reason setting term limits to two or three years (at most) is helpful. Term limits also help breathe new life into a board by bringing in new people with new experiences, networks, and ideas.

Bless and Release

We’ve all known board members who, despite having the best intentions, rarely show up for meetings, are unreliable, don’t respond to emails or phone calls, and inconsistently make an annual gift. Your board’s annual self-evaluation is a great opportunity for the board chair and CEO to learn what’s behind these members’ lack of involvement.

Encourage your leaders to discuss their expectations for board members with them and whether this role is still a good fit. If everyone agrees, it’s time to “bless and release” that member. It may seem awkward but, it’s likely that you will make it easier for the volunteer to step down gracefully.

Conclusion

As I said at the beginning of this guide, a board can literally make or break an organization's fundraising program. That's why it is invaluable for you to develop a clear vision of what you want your board to do and give them the tools to meet those expectations. I hope this guide will give you the tools needed to empower and inspire your board members to become successful advocates, donors, stewards, and ambassadors for your organization.

About the Author

Barbara has thirty years of annual fund, major gifts, and campaign fundraising experience at major non-profit organizations including Harvard University, the National Trust for Historic Preservation, Oxford University in England, and the American Red Cross.

Her consulting firm, Windmill Hill Consulting, helps non-profit organizations of all sizes peel back the layers and develop a profitable fundraising strategy that focuses on the resources, skills and tactics they need to build more effective donor relationships and catapult their revenue.

She serves as past president of the Association of Fundraising Professionals (AFP) Washington DC Metro Chapter and as a former member of the Advisory Panel for Rogare, The Fundraising Think Tank in the U.K. Her firm, Windmill Hill Consulting, is a member of the Giving Institute and Barbara is involved with the Giving USA report. She is a frequent and sought after presenter at national and international conferences. In 2020, she joined the faculty at the University of Maryland's Do Good Institute teaching nonprofit fundraising.



Barbara O'Reilly, CFRE
Principal
Windmill Hill Consulting

SAMPLE DONOR THANK YOU EMAIL

Dear XX,

As a board member of XX, I was delighted to learn of your recent gift to us. You have helped [provide a summary of your organization's accomplishments this year—keep the focus on those you served ,not you!]. We can't do the work we do without you. On behalf of [insert the beneficiaries or people you serve], please know how grateful we are to count you as one of our donors.

If you are interested in learning more about XX or seeing our work firsthand, please do not hesitate to contact XX.

Sincerely,
XX

SAMPLE BOARD FUNDRAISING EXPECTATIONS

<Organization> Board of Directors
Individual Fundraising Plan

Please complete this form as your FYXXXX fundraising plan by confirming your personal gift, choosing the donor development activities you will participate in, and setting goals in those areas. It is important that each board member commits to at least one donor development activity.

My Financial Investment in <ORGANIZATION>

Board members of <Organization> are each expected to make an annual gift in an amount that is personally significant to them. Gifts may be pledged and paid over monthly or quarterly installments throughout the fiscal year, paid by gifts of appreciated securities, or to include matching gifts from your employer.



My personal donation for FYXXX: \$ _____



My company will match this amount: \$ _____

Donor Development Activities

Ambassador

- Attend <Organization> events and send information on donors and prospects to staff.
- Invite friends, colleagues, and/or relatives to <Organization> events.
- Host a house party or invite a friend to host a house party. House parties can educate our new friends and donors about <Organization>'s programs and are also an opportunity to raise money. As host of a party, you will underwrite the cost of food and drinks, and open up your home to friends and family.
- Months that are best for me:
- I have a friend who is available to host, and I will actively assist with the creation of the guest list.

Connector

- Provide a list of prospects for donor cultivation and solicitation. The development director and fundraising committee will work with you one-on-one to develop an effective strategy for inviting your family, friends, or colleagues to support the work of <Organization>.
- Arrange a prospective donor meeting with an individual, corporation, foundation, or governmental agency that can provide new funding to <Organization>. Solicitation of prospective funding is more effective when personal contact is made. If you know any individuals and/or anyone in a corporation, foundation, or government agency that you can introduce personally to <Organization> staff and participate in a meeting, you can play a key role in <Organization>'s fundraising. Additionally, you may know of trustees who can make discretionary grants to <Organization>, or can be especially helpful in advocating for <Organization> on key proposals.
- I am interested in facilitating a donor meeting or specific communication with foundation trustees.
- Watch for names of prospects from annual reports, newspapers, etc., and send to staff.

Solicitor

- Participate in major donor fundraising by serving as a contact, participating in a meeting, and/or making ask(s). Raising unrestricted funds is an important component of <Organization>'s fundraising plan, and solicitations from major donors is an important strategy.



My goal to raise through major donor fundraising: \$ _____

- Solicit a sponsor for an event. Events are an important opportunity to solicit corporate sponsorship or to invite the support of other potential donors. We will let the board know in advance about the scheduled events so you have enough time to solicit sponsors.



My goal to raise through an event: \$ _____

Steward

- Make thank-you calls to donors and supporters. This activity involves calling and/or emailing donors just to say thanks. It is an opportunity to thank the donors for their support, answer any questions, and learn more about the donor. You will be given information and assistance to make these thank you calls.
- Write notes to major donors on event invitations, annual solicitation letters, etc.

Other

- Other ways to support fundraising. Please include ways you can volunteer your services to <Organization> or other ways you hope to raise funds for the organization (e.g., auction items).



My overall fundraising goal: \$ _____

I agree to fulfill the above-stated fundraising goals to the best of my ability.

 Signature









 Date

BONUS: Talking to Your Board about Software

If your nonprofit's board requires approval before a software purchase is made, approaching the conversation the right way can lead to success. You might not get approval from your board if you start with pricing and then discuss features without talking about the big picture. You must focus your conversation on the positive outcomes your organization anticipates. To get your board's approval you need to make it obvious what the outcome will be after you start using this new tool. How much time will you save? What else could you focus on with that extra time?

When your entire team, including your board, is on the same page when it comes to using a new piece of technology, you are more likely to find success with a new tool. If a purchase is made and your team isn't sure what it will do or who uses it will lead to low adoption. Low adoption leads to lack of results.

Keep these tips in mind when discussing a software purchase with your board:

-  DO tell your board what the tool will help you accomplish. What is the end result after using this tool for 6 months? A year? How much more could you raise and how much time could you save by using a tool designed to help you be a smarter fundraiser?
-  DON'T get too detailed with product features. You don't want your board lost in the weeds.
-  DO ask board members to submit question they might have before the meeting. Be prepared with accurate answers.
-  DON'T start the conversation with price. Boards often get hung up on financials and it's hard to steer them back to what matters: how this tool will help your nonprofit.
-  DO breakdown the cost to show what you're getting: software subscription, data import, product onboarding, and ongoing phone and email support.
-  DON'T give a list of features without explaining how the features will improve your processes—and what the impact will be (in saved dollars, increased donations, efficiency).
-  DO paint a tangible picture of what your organization could look like after this tool is purchased and adopted. Give them real examples of challenges you face now and how this tool will help you solve them. What's something the board wants to accomplish and how will this tool help achieve the desired goal?
-  DO show the board that you have someone in the organization that will "own" the implementation of the software.

Bottom line: Be as clear as possible about how your boards can be involved in fundraising. And give them the tools and templates to make their jobs easy.



Volunteer and staff leadership play a critical role in creating an organizational culture that embraces sustained and growing philanthropic support. Your board members can and must play an active role in donor engagement for your nonprofit organization in the ways that make sense for them. But, to do this, they need training and skills building to feel more confident in knowing how to most effectively connect with the organization's supporters.

Windmill Hill Consulting can customize board trainings so your volunteer leaders gain a greater awareness of how to:

- maximize their governance responsibilities;
- identify the roles they can play in creating a culture of giving for their organization;
- and strategically identify those they know who might be an ideal donor.

We can help your board with:



**Governance
Training**



**Fundraising
Training**



**Identifying
Ideal Donors**