

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.