




# 14 Tips to Engage Your Board of Directors in Fundraising



You're an emerging nonprofit organization. You've got a great mission meeting an important community need.

But as you grow, operational challenges become more complex and, more than ever, you need to be getting the most out of your fundraising efforts. You could start addressing this issue in many different directions, but why not begin with your X factor, your game-changer, your special quality that no other organization possesses?

**Your Board of Directors.**



## WHY START WITH THE BOARD?

Of course, every nonprofit has a Board, so it's not the *Board* itself; it's the unique individuals that compose it. You've collected a group of talented, dedicated and well-connected professionals who believe in the mission of your organization and want to see it succeed.

By its very nature, this governing body always has the *greatest* potential to significantly contribute to ongoing fundraising efforts. Whether it's through governance, networking, personal giving, recruiting, or strategic planning, your Board has the opportunity to take your fundraising from fair to fantastic.

## WHAT'S THE CHALLENGE?

Certain Board members may not always agree with—or believe—this principle. It's up to you to make them see the light. The sooner you can engage your board and have them understand their critical role in your organization, the faster you will see the impact on your fundraising.

**We've outlined a practical way to implement this process, laying out:**

- 1. Get Started Engaging Your Board:** How to start the conversation, find Board Champions, and set realistic fundraising goals and expectations
- 2. Get Everyone on the Same Page:** How to host a successful board retreat, motivate and inspire your members, and come to a consensus on fundraising goals
- 3. Moving Onwards & Upwards:** How to implement the new fundraising goals, hold Board members accountable, and continue positive Board development

***Let's begin!***

# GET STARTED ENGAGING YOUR BOARD

## 1) Start with the Board Leadership: Find Your Champions

Take the leadership's temperature regarding a renewed focus on fundraising by initiating discussions about increased fundraising engagement with the Board Chair or Board Executive Committee.

**A few Board champions are essential to building momentum.**



If you sense hesitation from the Board, find common ground by keeping the mission of the organization at the center of the discussions and how funded is needed to carry it out. Determine mutually agreeable goals about how these new efforts will be rolled out.

## 2) Schedule Individual Board Member Meetings

After gauging the status with the leadership, meet with all other board members to solicit their feedback about the desire to ratchet up fundraising expectations.

While face-to-face meetings are optimal for a personal touch, teleconference can be utilized. Understand their passions and how they would like to help. Your goal? Have your vision for fundraising embolden them.



### **3) Set Board Fundraising Goals with Board Champions & Board Leadership**

Based on interactions with the Board, both with leadership and all other members, set fundraising goals with your Board Champions and Chair. Make sure they are realistic, yet advance certain key ideas. These will vary by organization depending on your fundraising strategy, but should include the following:

First and foremost, can we all agree everyone has a role to play in fundraising?

#### **Personal Contributions:**

- Can 100% of this Board make a personal donation?
- Can this organization be a focus of your personal philanthropy?
- Can Board donations comprise X% of our Annual Fund goal?

#### **Networking & Support:**

- Can we all agree to make introductions to potential donors or supporters?
- Can we count on you to fill a table at our signature fundraising event?
- Is everyone open to serving on at least one fundraising-related committee during the year?

# GET EVERYONE ON THE SAME PAGE

## 4) Plan a Board Retreat!

This doesn't mean an expensive or overnight event (although, it can be, if that's your style). By "retreat," we mean a semi-casual interactive event, outside of a regular Board meeting, for all Board members to gather together and focus on their role in the organization.



Some Boards like traditional retreat settings, like a lodge or hotel. Others may prefer something less formal, like an afternoon potluck at a community center or park.

No matter the setting, include a "mission moment" where a beneficiary of your organization speaks about the direct impact it had on their life. This will motivate the board and connect them to the heart of your organization.



## 5) Have *the* Conversation

So many organizations don't have this conversation enough—the conversation that **fundraising is not about money**. It's about achieving your mission to bring positive change. Utilize the “mission moment” and tap into the reason Board members joined your Board. Tap into their passion for the cause.

This is a great opportunity for Board members to openly discuss their connection to the organization and their motivation to volunteer. They may be worried about their own fundraising limitations, or they may reflect on the joy they have in working with the cause. Only through an open conversation can they realize that can be the case for other members, as well. This will create a greater sense of camaraderie on the Board.



## 6) Have a Clear, Outlined Case for Support

You want to do everything in your power to facilitate fundraising for Board members. Prepare for the Board retreat by creating talking points, such as stats demonstrating the need for the cause, or personal success stories, or powerful metrics that speak to change created by the organization. They will more readily become top-notch ambassadors, and donors, if armed with persuasive points that are clear, concise and compelling.

Distribute these useful talking points. During the retreat, encourage Board members to pair up and briefly practice making the case for your organization to each other. Make them comfortable promoting the mission.

Consider even having each member formally indicate how they will participate. The Board Chair, or member of Executive Committee, could follow up with each Board member and make sure everyone is on the same page.



## 7) Agree to the New Fundraising Expectations

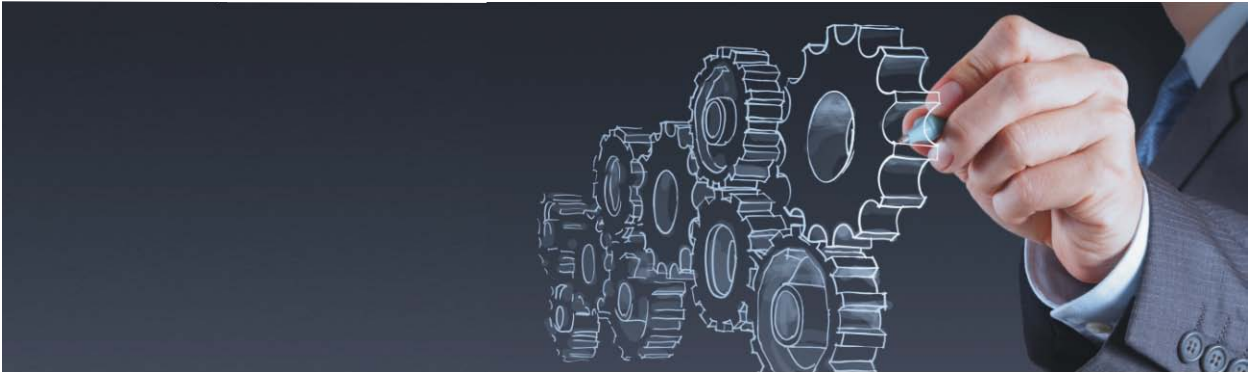
Present the new fundraising goals and expectations prepared with the Board leadership. Hold a discussion and make sure each member feels that they are able to contribute to the conversation. There will likely be changes from the original goals, but it's important that these are realistic and attainable expectations for the Board members.

Once there is a general consensus, have each member formally indicate how they will participate. The Board Chair, or member of Executive Committee, should follow up with each Board member after the retreat to ensure their cooperation and hold them accountable moving forward.



## 8) Refine Board Development Practices

Work with the members interested in Governance/  
Nominating to implement or further refine current Board  
development practices that will affect the Board's ability to  
raise money.



- How can this fundraising vision for the Board be supported through Board development?
- Which new Board members will take us to the next level?
- Who is currently in our pipeline?

Encourage critical thinking around Board recruiting and effectiveness, especially as it relates to fundraising, and leave the retreat with a clear idea of the types of individuals to target for future board members.

# MOVING ONWARDS & UPWARDS

## 9) Expect Board Attendance at Fundraising Events

A majority of the Board should be present at major fundraising events. These events are key times for other constituents to see your leadership in action. It's also one of the best times for Board members to actively advocate for your organization and build relationships. Keep putting those key event dates in each Board meeting packet.



## 10) Identify & Utilize Board Superstars

You have your minimum fundraising expectations in place but what about your maximum expectations? There will always be select Board members willing to go above and beyond. Identify them and cultivate those relationships.

- Will they add handwritten notes on appeal letters?
- Make thank you calls to donors?
- Accompany you on a solicitation call?

Ensure these Board members feel successful in their additional fundraising endeavors by assessing their insights and encouraging open dialogue.



## 11) Prioritize Fundraising Updates at Board Meetings

Many Boards create meeting agendas that do not feature fundraising updates or minimize them by covering the topic for five minutes at the session's conclusion.

**Don't be one of these Boards!**



If fundraising is central to a mission, it should be a central aspect of Board meetings, whether that's through discussing prospects, evaluating results or introducing opportunities.

This recurring agenda item serves as a reminder that successful fundraising requires a diligent and consistent focus. It seems basic, but it's often overlooked.

## 12) Celebrate all Fundraising Successes with Board!

It could be a single Board member victory, such as an introduction to a new major donor, or a victory by the organization as a whole, such as hosting a successful major event.



It can often be a long and winding road to a fundraising win, so be sure to connect the dots for the Board and highlight contributions Board members may have made. This recognition and gratitude will go a long way in encouraging future successes.





### 13) Continue to Develop Board Leadership

When you see an opportunity for the Board to learn more about fundraising, through a third-party seminar or conference, encourage the Board Chair to promote it and personally invite fellow Board members to join him/her. Promote training opportunities to your Board/Development Committee Chair.



**Remember:** For many Board members, this is their first time fundraising and they still have a lot to learn. Encourage their own professional development as leaders in fundraising and philanthropy.

## 14) Keep smiling!

Many Board members will be taking a leap of faith to bolster the organization's fundraising efforts. They are volunteering their time, leveraging their contacts and resources, and making their own personal financial contributions. Be positive. Be reassuring. Be a resource!

None of this is meant to imply that this process will be easy. But you owe it to the organization and those you serve to effectively fund your mission and you're not going to do that all on your own. You need a Board of Directors who will engage in raising money and support your fundraising efforts.

Once this is in place, you will have established a culture, from the top down, that makes fundraising a priority. And when you're finally able to rely on your X Factor, the sky's the limit.

