CHAPTER 1

An Understandable Problem

(Feel Free to Skip Ahead to the Solution)

Tell me what to do with my board!

—Executive Director's plea

What Is Keeping Board Members Away from Fundraising?

Two major barriers stand between our board members and their willingness to venture out on the short and skinny branches of the fundraising world:

1. Board members equate fundraising with the awful experience of "asking for money."
2. Board members are not engaged in or passionate enough about their organizations.

Let us take a look at these two key issues.

Board Members Think Fundraising Is "Asking for Money"

Typically members of boards do not understand the full context of fundraising—not only how we do it, but what it is all about: the bigger picture of developing friends/donors/investors/partners who are on our organization's team and who will stick with our cause for the long run, providing both money and moral support for our mission.

Also, they do not understand the reasons we work so hard to raise money—reasons that are among the most noble and altruistic imaginable. We know that we are ultimately working to make the world a better place, *and* to improve or save lives, but our board members do not equate this with fundraising.

The real issue is that trustees just do not understand fundraising at all—they make up their own stories about it, and, unfortunately, they think that "fundraising is begging." So

they are stuck, really stuck, in a very uncomfortable place, because the idea of "asking for money" strikes anxiety and fear into most nice, well-meaning board members' hearts.

Let's remember the most fundamental motivators for human behavior. We humans seek experiences that will bring pleasure and avoid anything associated with pain or discomfort. We are naturally drawn toward positive experiences that will yield some type of good-feeling payoff, and we try to stay away from anything that is negative or stressful.

It takes not courage alone but also tremendous commitment to tackle something really scary and stick with it. I have the utmost respect for the brave board members who are quite nervous about fundraising but courageously step up to the plate regardless of their fear, because they are so committed to the cause.

They are my heroes, because they are standing up for something that is deeply important to them personally. They are willing to challenge their deep inner discomfort, because they believe they can make a difference and help create change for the good.

However, most board members do not have enough passion and commitment to the cause to propel them through their fear. The mission is not for them a full-time commitment or career as it so often is with staff.

The board members are simply kind-hearted people wanting to help their communities and do good works in their spare time. And so for most, the motivation isn't high enough to get them to take on what they imagine fundraising to be: "asking for money."

Board Members Are Not Sufficiently Committed to or Involved in Their Organization's Good Work

The best way you can get most board members to engage in fundraising is to get them super-charged up and deeply committed to the change they want your organization to achieve out in the world. That is why, first of all, they have to be engaged, active, excited, and involved.

This book will describe ways to create this change. Many nonprofit board members are disconnected, in varying degrees, from the work and mission of their organizations. We have all seen too many boards with members who are not particularly knowledgeable about their organization or the results it is achieving.

These days there is a lot of talk in our sector about nonprofit boards, much of expressing deep disappointment. There is now an entire "board-improvement" field offering suggestions on how to create more effective boards

Nonprofit experts talk about a "crisis" of underperforming boards. Leadership and governance models spew forth assorted new ideas and approaches to address board inaction, misdirection, and dissatisfaction.

This is a very real problem that most organizations simply muddle through and do not know how to address. Where is the "constructive partnership" that we all seek with our board members?

The board members themselves are not to blame. Trustees are often dissatisfied with their own experience. Talented and high-achieving people, they are typically asked to do low-level, meaningless work that does not inspire action or create commitment, much less tap their real creative talent.

It is time for us to recognize this second reality about board members and their lack of involvement, a truth that is important to understand: If you have a situation in which your board is disconnected or not engaged, then its members will not—repeat, not—tackle fundraising enthusiastically. They may get dragged into it, but they will not do it with passion, care and heart. If they are not fired up enough about your organization, they will avoid you when you even mention fundraising.

To be sufficiently motivated to venture into fundraising, these talented men and women need to have the chance to "own" the organization's goals, its mission, its plans, and its challenges. They need to be able to participate in substantive discussions that will help chart the organization's future.

Are your board members really helping to determine where your nonprofit organization is heading and what you need to accomplish? Are they given the opportunity to provide what we might call "effective governance"?

They need an atmosphere of openness and trust with the staff, particularly the CEO and development director. They need to feel that they are active contributors to, and part of, your organization's success.

That commitment must come first and you, the nonprofit professional, are the one to make it happen. Remember, it is our responsibility to set the board up to win in fundraising.

So please do not ask consultants for a magic solution, hoping that a quick pep talk will get your disengaged board to bring in the big bucks. I cannot work miracles with a group of people who are not offered the opportunity to be co-partners with the staff—in appropriate roles, of course—to make the organization's work possible.

What I can do is show you here is how to stir passion in your board members and then steer them into action.

What Do Board Members Want, Anyway?

The role of a nonprofit trustee today is just as likely to be confusing and demoralizing as invigorating and rewarding. We are not paying the attention we need to our boards as a whole and to their individual members.

The care and feeding of our board members is an oft-neglected art. And I do not say that lightly—it really is an art. Drawing a board member into happy action on behalf of our cause is much like the delicate process of cultivating a potential major donor.

No wonder our board members are not more active. No wonder they sometimes hurriedly take the short way out by latching on to quick, ineffective solutions to whatever

challenge is at hand. In these cases, they are not interested enough to spend the time to think through our issues and options.

We have to spend the effort to deepen their relationship with our organizations. We can evoke what they are passionate about and fan the flames of their desire to see change happen for the good. We have to be present, listen to them, offer varying ways they can become involved, and act on their suggestions. It is called cultivating their involvement —just like we do with our donors.

Engaging board members in fundraising has to start at the beginning—with the quality and involvement of your board itself. You can create partners out of your board members and have them actively participating and deeply passionate about your mission and outcomes.

We need to be sure that the *experience* that board members have is worth their time and energy. This experience gets to be meaningful at some personal level. They get to have a sense of offering something of worth to their organization. If you can create this, then their reluctance to raise money will begin to dissolve.

Board Service: A Disappointing Experience?

> *The problem with our board is that there is nothing for them to do but come to meetings and talk.*
>
> —Nonprofit Development Director

There is much talk and worry these days about what goes on in many nonprofit boardrooms—outmoded practices, conflicts of interest, holding on to the past, overlooking difficult challenges, unclear accountability, and more. There is even more frustration over the lack of inspired, creative governance coming from them, not to mention board members' well-known lack of support for fundraising.

What causes a group of talented, caring individuals who join a board to slip so quickly into inaction? What is it about the experience of serving on a board that causes smart, capable, connected people who want to help their organization to inexplicably lose their fire and their motivation?

What Is Wrong with This Job?

Perhaps the problem lies in the basic setup and structure of the nonprofit board itself. The overall role of boards is not clear, particularly to board members.

What is "governance" anyway, especially in practice? Are trustees on the job just to keep order, or merely to help create legitimacy for the organization? Or are they given an opportunity to live up to their potential and actually provide thoughtful leadership?

Here is the interesting question: whose job is it to give them that opportunity to lead? Will they create it themselves? Or will we have to create it for them?

What activities are we are asking our boards to undertake? Are these activities *meaningful* or *meaningless*? In actual practice, is the real work of the board detached from our organization's mission, or does it give board members the sense of actually making a difference in the world through their service?

> *I have seen new Latino boards get organized with members full of passion. Then they hear 'you have to learn how to be a nonprofit,' and suddenly the passion gets tempered with the reality of running an organization.*
>
> — Dan Moore, former Vice President of Kellogg Foundation

Could serving on a nonprofit board really be, as some have actually complained, an exercise in irrelevance? Do our board members even understand what their appropriate role is? Is it because they are *confused,* as some experts claim, about their duties and simply need a clearer job description to set things right?

Are Board Members Unhappy?

Instead of being unclear about their job, it may be that trustees are *unhappy* with their job. If so, I cannot blame them!

Chait, Ryan, and Taylor suggest in their provocative book, *Governance as Leadership,* that board members are not confused about their role, they are *dissatisfied* with their experience: Board members are frequently "derailed by the meaninglessness of what they do."[1]

I take the view that we do not necessarily need to give them clearer job descriptions; what we need to do is give them more satisfying work.

Chic Dambach, a BoardSource consultant and CEO of the Alliance for Peacebuilding, described this situation clearly in a recent article for BoardSource:

> Most nonprofit boards are comprised of community leaders and other people of exceptional knowledge and skill. Yet, few organizations take advantage of this remarkable resource.
>
> Committee structures impose mundane and needless tasks on busy people, and board meetings become tedious and repetitious exercises. The purpose of the organization gets lost in endless reports, while opportunities to enhance performance and produce meaningful results rarely make the agenda. The skill, talent, and resources of board members individually and collectively are wasted.[2]

One reason board time is so often spent on trivial and unsatisfying issues is the careful use of our overly structured, dispassionate friend Robert and his Rules of Order.

Just what we need to get our board members fired up: give our smart board members "mundane and needless tasks." Boring, bureaucratic meetings that follow a rigid format end up focusing members' attention on the smallest details, while ignoring pressing strategic questions. If you want to wring most of the energy, excitement, and creativity out of a meeting, then follow Robert's Rules closely and that is what may happen.

A Culture of Consensus

The challenge is more profound, however, than the way boards run their meetings. We need to look at the deeper level of how we think and act together in groups. Let's look at "group process" as an agent that can prohibit creativity and change in our organizations.

The basic nonprofit board structure itself fosters a sort of group mentality that values harmony and conformity. Like many cultural groups, boards like to hold to the status quo. They tend to discourage dissent, and resist new ideas and change.

We know well the long-serving trustees who stubbornly cling to "the way it was" when they helped found the organization. They are unable or unwilling to recognize new opportunities for change and growth.

It's like they are trying to steer a boat by looking backward at where they have been rather than forward to see if storms or funding crises are ahead.

Many boards are bastions of conservatism and reticence. People do not want to disagree; instead, they want to belong. Being accepted by the group is more important than asking the hard questions.

> *Where all think alike, no one thinks very much.*
>
> —Walter Lippman

Opinions and serious debate are rarities. Consensus can drive decisions to the lowest common denominator. I am sure we have all experienced these situations on our own boards or on boards on which we have served.

It is interesting to consider that many organizational consultants say chaos, not order, is what generates new ideas and fresh thinking. It is when you do not know what to do next that fresh bursts of creativity are brought forth.

The businesslike approach to meetings offered by Robert's Rules sets up a precise ongoing structure that inhibits healthy disagreement. There is no format to deal with surprises or chaotic conditions that might push our organizations to the breaking point.

Consider that our nonprofit organizations are like "organized systems" of interrelated—and interdependent—people and tasks. Everything that happens depends on many parts of the organization or "system" functioning properly.

Fundraising success, for example, depends on long term organizational credibility, snappy marketing, savvy strategic planning, dynamic leadership, and so on. Many of these are outside the control of the development office yet directly impact fundraising results. All parts of the overall system need to be functioning at a high level in order to produce fundraising success.

Since our organizations are organized, living systems, then chaos theory also applies. If we want creativity and change in our organizations, then sometimes we need to allow for disorganization and even chaos. Chaos theory holds that systems experiencing chaos are not completely out of control after all. They actually contain an inherent underlying organizing structure within all the disorganization and confusion.

And what is best is that a system in chaos will naturally self-correct into a new structure that is *better adapted to handle current stresses* and challenges than the earlier one. So chaos can be a good thing; not something to be avoided at all costs.[3]

Just think about an organization faced with a serious challenge—maybe it's a new competitor, or maybe it's the imminent cut off of a major funding source. No one knows what to do and everyone may be confused, uncertain, even on the edge of panic. But in the middle of the disorder, new out-of-the-box ideas come forth to offer creative solutions to the problem at hand.

Once the organization or "system" has reorganized itself, it is better prepared to handle new stresses in its future environment—for example, it may have decided to merge with the competing organization or developed an innovative new fundraising strategy. Postchaos, the newly reorganized nonprofit "system" can embrace the future with renewed vigor and an invigorated board will tackle fundraising with enthusiasm.

Can We Create Change?

> *If the rate of change on the outside exceeds the rate of change on the inside, the end is near.*
>
> —Jack Welch, Former Chairman and CEO, General Electric Corporation

The trouble is, many of our organizations are sluggishly, if doggedly, conducting business the same way they did decades ago. They are burdened with an outmoded governance structure that worked in the past but can be crippling as we forge into the uncertainties of the twenty-first century.

We are operating in an environment that is changing incredibly fast, and the rate of that change is accelerating, not slowing down. The world has changed. If we are to run successful nonprofits, change is required, not optional. Our ways of doing things in the past will not necessarily be successful in the future.

When an organization starts to become a bit stale in its thinking, it first shows up in funding crises. Organizations have life cycles. A mature nonprofit can easily become "old news"—which is a real challenge for many long serving and successful organizations.

It may have begun to drop down on the community's radar screen. There are new, more "sexy" organizations capturing the hearts and minds of the community. The organization has started to lose its market position in donor's hearts and minds.

In these cases the nonprofit will call in a fundraising consultant. Invariably I will find that the problem is not fundraising; it is in fact organizational strategy, culture, marketing messages—and even the board—that are the problem.

Its leadership has been looking backward, not forward. The nonprofit will need to reinvent itself if it wants to remain relevant in its service field and/or continue to raise enough funding to flourish.

And I find that encouraging a nonprofit organization to reinvent itself can be a tall order. That's where an engaged, thoughtful, savvy board is essential—a board that looks forward, not backward. This is the kind of board that will raise money.

IN THE REAL WORLD

Once I attended a meeting as a board member of a university-affiliated nonprofit. I knew some major issues were looming on the horizon. There was a rumor that the university was considering a policy change that could pull the rug out from under this organization.

I was startled—no, I was astounded!—to find an agenda that focused on routine concerns. The order of business totally ignored the elephant in the room. How could the board members chat complacently while avoiding any mention of an impending event that could wipe us out?

We were fiddling while Rome was burning, distracting ourselves with irrelevant details. Yet the highly structured agenda gave board members a businesslike sense of competency. They left the meeting satisfied that they had dotted the i's and crossed the t's and were doing a good job managing the organization.

The Code of Nice

"The Code of Nice is pervasive in all areas of the nonprofit industry," as Pamela Wilcox writes in *Exposing the Elephants: Creating Exceptional Nonprofits*; our prevailing attitude is "do something and be hated, do nothing and be loved."[4] Of course we want a comfortable and collegial environment. But nice does not mean avoiding what is vitally important. There's nothing nice about that kind of irresponsibility.

We need to be able to deal openly, directly, and honestly with the big issues that shape the organization. Where is bold, risk-taking leadership when we need it?

Our board members' desire for consensus results in decisions that are often too safe—an easy way out for all. Audacious goals involve too much risk. Dynamic leadership can get worn down by group inertia and drag. How can the real work of the organization get done when everyone is just so very pleasant? And who will do the fundraising?

> *I worry that serving on our board is considered more of a burden than an honor.*
>
> —Executive Director's lament

The Best Dream Team Board Members

There are some wonderful board members out there, who not only help in fundraising but also tend wisely to our organizations and provide all manner of moral support. They

care deeply, and you can tell that they do. They bring a vision and a spirit to the cause that helps inspire other board members.

The best board members perform at a level far beyond the typical nonprofit board member's job description. What do they do that is so special? How can we capture it?

Perhaps we could start by articulating the qualities that are not even mentioned in formal job descriptions but are so very valuable; qualities that Dream Team board members share:

1. They look at the big picture (where the organization is going), and they keep a careful eye on external forces in the outside environment. They make sure our organization is adapting to a changing world, focusing on where we should be in the future.
2. They ask the tough questions that we do not always ask with a fresh perspective. They act as "outside directors" to keep us honest and focused on the important issues. They are willing to provide what you might call "a constructive friction" to our discussion.
3. They keep us accountable, and keep themselves accountable as well. They insist on results and keep an eye on the bottom line.
4. They are active and self-initiating as fundraisers, willing to use their connections, actively opening doors to create new relationships that will extend our organization's reaches into the community. In appropriate situations, they ask for funding. They participate 100% in fundraising campaigns and in all activities that support fundraising.
5. They understand our organization's needs and what we are raising money to accomplish. They are able to talk with passion and urgency about our organization, its mission, and its case for support.
6. They are wholeheartedly, actively—and pragmatically—committed to our mission.
7. They give us their wisdom, moral support, engagement, and interest. They monitor our organizations with integrity and strength and guide us to success. They look for *solutions* to problems, rather than focusing on the problems themselves.
8. They take the time to think through all our issues and challenges. They don't take the easy way out and latch on to quick solutions.

There are plenty of formal job descriptions for board members out there, but it is these qualities of leadership, vision, and commitment that make our organizations fly high, and that makes the change happen in the world that we want.

What would happen if we set these expectations out in the job descriptions we provide to board member? Would we enlist more or fewer great board members? Would we inspire them to action? I think we might just inspire them to a stronger role, even to be great in the largest sense of the word.

The Right Roles for Board and Staff

What is the board's role and what is the staff's job? Want to create confusion? Ask this question! This perennial issue about roles and responsibilities for board members is the stuff of endless discussion. We would probably all agree that defining appropriate roles for board and staff is a constant challenge for many nonprofits.

To solve this problem, many pundits offer clear, cookie-cutter divisions of roles: boards focus on policy, strategy, and governance, while staff members handle management, administration, and execution.

However, the real fact is that *much responsibility is shared* among board and staff members. Both the staff and the board have dual leadership roles that are interdependent, and many of these roles overlap.

Of course this results in conflicts about who is expecting whom to do what. That this situation occurs is understandable. The staff thinks some jobs are the board's responsibilities, yet board members do not agree—especially when it comes to fundraising.

> *Our board has been operating from the perspective that "staff" does all the work, and the board either approves that work or critiques it.*
>
> —Nonprofit CEO

Focus on Outcomes and Results

Our only way out of this potentially damaging fog is to simplify, simplify, simplify. Let's just define expectations in terms of *outcomes and results.* Who needs to do what in order to help the organization succeed?

Appropriate roles and responsibilities clear up quickly when everyone's eye is on concrete results they need to create personally. For example, the most important question to ask is: *what do I as a board member need to do this week or this month to help my organization succeed?*

Recently I facilitated a planning retreat for a local board. One of their objectives was to clarify the board's roles and responsibilities. We could have spent hours of valuable time in theoretical discussions about the appropriate role of the board.

Instead, we focused on defining what the board members needed to accomplish for their organization in the next six months. This attention to immediate action items simplified—and stimulated—the discussion.

Board members were invigorated, and they left the retreat far more excited and fired up than they had been, because they had a clear sense of how each person could be in action to help the organization. They wanted to connect their work as board members directly to their nonprofit's mission.

It is interesting that outcomes and results are so rarely discussed with board members. Staff does not typically force the issue of their expectations of the board's performance—or its responsibilities.

This can be difficult, since the staff actually works for the board: the employees cannot talk frankly with their bosses about the bosses' own responsibilities and/or their lack of performance. This is where board self-assessments and a neutral consultant are valuable.

My board will not fundraise; what do I do?

—Executive Director

Does the Board or the Staff Do the Fundraising?

Our organization has a very strong board that is committed to our school. However, I believe they do not, for the most part, view fundraising (other than giving) as part of their responsibility.

—Nonprofit CEO

The issue of whose responsibility it is to bring in the money is almost always a subject of disagreement and frustration. As a consultant, one question I am frequently asked is, "What are the appropriate roles of board and staff members in fundraising?"

Allocating responsibility for fundraising is like a game of tag. The person who is "it" chases all the others until they tag someone else who becomes "it": "you're *it*; no, you're *it,*" and the buck keeps passing. No one will let the monkey sit on their back when it comes to fundraising.

Everyone leading the organization wants a job description for board members telling them they *have* to raise money, and most organizations in fact state this clearly. However, even when board members actually sign agreements that they will help raise money, too many are still simply not willing to do the job. They freeze when it comes time to act.

From my perspective, if one-third of the board will shoulder fundraising responsibilities, then you have a substantial force to work with. This third can be the "tipping point" to inspire the rest of the board to action.

Board Members as Either Askers or Ambassadors

I expect my board members to fall into the roles of either Askers or Ambassadors, roles I have created so that everyone can find a way to comfortably support the fundraising program. If they are not comfortable asking, then they still play a support role by representing the organization as Ambassadors.

The Askers obviously are willing to go out and help raise money by directly soliciting. They are the fearless ones who inspire others with their energy and enthusiasm. We can't live without them!

The Ambassadors assist with everything else in the fundraising cycle. There are many, many support roles they can play: helping to identify donors, involving and cultivating donors' interest in their organization, and creatively thanking them. From my point of

view, every single board member has an important role to play supporting the fundraising process.

> *The successes I've had have come from recognizing that some people excel at fundraising and some excel in other areas. While I believe that it is important for all board members to engage in fundraising, there is usually a core group who will carry the load. Expecting everybody to contribute an equal amount of raised funds is a recipe for disaster.*
>
> —Nonprofit CEO

The Three Major Jobs for Board Members

Clearly trustees have a legal duty to ensure that the organization has appropriate resources. I like to simplify all the various board roles and responsibilities into three major areas.

Their first job is to keep their organizations clean and legal. Board members are legally the "stewards" of the organization, and as such must carry out their duty to ensure that legal, financial, and reporting matters are handled honestly and accurately.

In this era of increasing public demands on nonprofits for accountability and transparency, this function of the board is more important than ever. This role of fiduciary oversight can be mundane and detail oriented, certainly not exciting or engaging.

Their second job is to serve as the link to the outside community, bringing in resources and connections. And that also means raising friends and funds.

The board members have a clear duty to ensure that the organization has appropriate resources. In actuality fundraising is interpreted in many different ways and worked out in varying structures, depending on the organization itself, its stage of development, the skills and longevity of its staff, the capabilities and interests of its board, and its fundraising history. There are as many different fundraising roles for board members as there are organizations. I treat board roles and responsibilities in fundraising in detail in Chapter 6.

Their third job is to define the organization's future. Setting organizational strategy in light of a rapidly changing environment requires a future focus, carefully observing potential outside influences.

It calls for a watchful eye on your nonprofit's position on the community radar screen; in other words, its brand and market position. It needs creative thinking and fresh approaches, not business as usual and certainly not the traditional rote fill-in-the-blank strategic planning processes we typically employ.

The Board's "Must-Do" Fundraising Duties

One thing is clear: *the board must see that the organization has a valid and realistic plan for bringing in needed funds.* Board members should play a direct role in helping to bring in these funds. They should agree on a plan with staff that allocates specific roles for board members and staff members.

Every organization executes a different fundraising program. The board and the staff together work out who is to do what to create fundraising success—with both assuming responsibility. It takes a team to raise money.

Organizations should *require* the board to play some type of role in fundraising, and this role should be spelled out clearly in a board job description or commitment letter that we will discuss later. We will also discuss the many roles board members can play to support the fundraising program.

> *We have struggled to get our board to focus on fundraising.*
>
> —Nonprofit CEO

All too often, the members agree to fundraising jobs but somehow never accomplish them. And since they are volunteers, they cannot get called on the carpet, can they?

Of course, we all know that volunteers do not react positively to being told they "have" to do something. They would rather feel guilty about letting the organization down than tackle unpleasant fundraising chores.

> *Keeping board members focused on fundraising is an ongoing problem. Most board members are already very busy, and their fundraising calls have a way of falling down their priority list.*
>
> —Nonprofit CEO

So job descriptions for fundraising simply may or may not be followed, for many reasons, human nature being what it is. Staff members privately understand that they often cannot rely on board members to come through.

Considering their lack of training in fundraising, board volunteers can hardly be expected to be wildly enthusiastic and successful at something they may have never done.

They need lots of training on how to approach fundraising and plenty of support to get their jobs actually completed. Fundraising will never be an activity that we can delegate to the board and happily go off on our programmatic way.

We will talk in detail later in this book about how to introduce fundraising to your board in a way that excites their passion and commitment for the organization—and that sets them up to tackle their fundraising roles with gusto.

IN THE REAL WORLD

Recently I was working with a nonprofit that required all board members to submit ten names to be solicited for the annual appeal. When the board members were originally recruited, they all signed a job description that plainly said they would: "provide ten names for the annual campaign mailing list."

(continues)

IN THE REAL WORLD (CONTINUED)

A problem arose, though, when some board members simply refused. They said it was not appropriate because they were uncomfortable "hitting on" their friends—regardless of what they had agreed to when they joined the board.

I recommended that the staff take a softer approach with their board. Steer clear of talk of soliciting, I suggested, and change the wording of the assignment. Instead, try asking each board member to bring ten people in for a tour. Once you get people here, you know that they become hooked and always become donors.

The staff liked this change. They shifted into asking board members to make friends for the organization rather than directly soliciting ten people.

I am waiting to hear how the board members liked this. I'll be very surprised if they do not find it both agreeable and effective.

The Reality of Board Members and Fundraising

We all have a dream image of the ideal trustee who is able and willing to solicit with passion and energy. Consider the previous job description of the best Dream Team board member. Much of what we hope for is related to fundraising, of course, yet few board members fit this noble description.

We are holding up a "dream" level of performance as the standard and setting our expectations accordingly. However, the reality of what board members actually do is very different. Again, we must clearly acknowledge reality so we can deal with our board members as they are, not as how we imagine they are.

> *Our board would talk for an hour about programs, but we couldn't get them to talk for five minutes about fundraising.*
>
> —Nonprofit CEO

Our board members have some challenges when they are confronted with fundraising. Let us acknowledge real attitudes and real situations so we can deal with them and make things better. Here is the *reality* of the problems we have with board members and fundraising, remembering that we play a major role in solving each issue:

- ***Board members are not fully engaged in our organizations.*** We have discussed how they may be bored because they are not asked to do anything substantive. Or they are distracted by focusing on the wrong issues, or possibly they are too new to the organization to know what to do.
- ***Board members do not fully understand their organization, the impact it makes, or its mission well enough to talk about it.*** I hear too often from board members that they don't know what to say about their organization. This is our responsibility—we give

our board members plenty of materials, but often it is not the right information or it is too full of jargon for board members to use effectively.

- ***They do not know how to be passionate, articulate spokespeople for our organization.*** Again, we can fix this: we need to help them learn what to say—and how to say it.
- ***They are reluctant to open doors to their connections.*** They do *not* actively look for connections in the community and potential funding relationships, because, as we have discussed, they fear the "asking for money" issue. Also, we have not made it clear to them what they will be asked to do if and when they do open doors to their connections.
- ***Board members are not all making "proud" gifts to the best of their ability.*** Board solicitation is frequently not done as effectively as it could be. We will talk about the right way to solicit your board in detail in the last chapter.
- ***They are afraid of fundraising.*** They are anxious about asking for money. They think it is unseemly and inappropriate. They are afraid of rejection. We have not educated them properly about the philosophy of fundraising.
- ***They agree to make fundraising calls, but then do not do them.*** We do not set them up to win with fantastic training, inspiration, and top-notch staff support.

> *I am continuously impressed by a sort of 1950s mentality that board members come in with regarding expectations for fundraising. They think if they give their time, then they are off the hook for fundraising.*
>
> —Nonprofit Consultant

Quotes from Board Members About Fundraising:

- *Let the staff do it.*
- *Isn't that the staff's job?*
- *I'm giving my time—that's enough.*
- *I'll do anything but raise money.*
- *Asking for money is dirty work.*
- *Eeek!*

The Mistakes We Make with Our Board Members and Fundraising

As I have said before, it is our responsibility to set up our board members in active, satisfying roles that can support the fundraising process. Too often we make mistakes that hurt, rather than help, our cause.

We approach fundraising in the wrong way. In our defense, we mean well, and we want to treat our board members nicely. However, staff fundraisers are generally overworked and overwhelmed, and all too frequently we try to tackle too many projects at once.

For all our professional skills, we sometimes rush board members through much of the fundraising process, particularly their training. Also, most fundraising training for board members focuses on the wrong thing: teaching them *how to ask for money* rather than introducing a deeper context of what philanthropy and fundraising are all about.

Most fundraising training misses the mark by jumping straight to soliciting. It eventually inhibits board member energy and excitement for the cause rather than pumping it up. Introducing board members to fundraising by presenting a seminar titled: "The Art of the Ask" is not a way to bring them gently to the table.

We forget that our board members just do not get it. And they will tend to resist until they do understand what fundraising is all about. In a too-much-to-do hurry, we as staff can make some common blunders that squelch our board members' enthusiasm and set them up for failure.

Let us look at some of the major mistakes we make with our board members when it comes to fundraising.

The Five Most Common Mistakes

Mistake One: Asking for Money, not Building and Keeping Friends As we have discussed, presenting board members with the task of "asking for money" is not the most effective way to inspire anyone—board members or not—to help raise money. If we can get board members to change their point of view and create a conversation about their vision for a better community, not about cash, then the tone changes to one that is far more energetic and exciting.

> *I was once on a very aggressive fundraising board. I felt that we were so focused on the money that we lost sight of why we were even doing this. The conversations were always about the bottom line, not about the kids we helped or the work we were doing.*
>
> *The fundraising became almost like an end in itself. I had to force myself to remember what it was all for.*
>
> —Former Board Member

If we can shift our board members to a Passion-Driven Fundraising approach, they will focus first on making friends for our organization and then getting them on our bandwagon as donors—then everyone wins.

Recently I was doing a fundraising training for the Board of Wake Health Services. At the end of the evening, I asked the folks around the table how their notion of raising money might have changed after our discussion.

One of the doctors who cared for homeless persons came up to me later and said, *"This was so very helpful. Before, when I thought of fundraising, I immediately imagined cold calls. You have shown me that I can help in fundraising in lots of much easier ways. Fundraising is not necessarily cold calls at all; in fact, good fundraising is everything but cold calls."*

We cannot allow our good-hearted, well-meaning, but nervous board members to get away with equating fundraising with soliciting.

Mistake Two: Too Many Calls at Too Low a Dollar Level If we are going to use board members in solicitations, then it is important to plan carefully the highest and best use of their time in order to make the most of their valuable contacts and limited availability.

I have seen well-meaning but scared trustee volunteers bravely step up to the plate, willing to help make annual giving solicitations in person. And then the thankful but overly optimistic staff loads them up with far too many calls to make at one time.

Worse, the calls are for meager amounts of money. It is much better to focus our board members on fewer calls at much higher dollar levels.

> *It takes the same amount of work to get a $10,000 donation as it does to get a $100 donation—you just have to ask different people. People's own views on money tend to limit the size of the donations they solicit.*
>
> —Nonprofit Board Chair

I believe in asking board members to make only three calls at any one time. Any more will seem like too many; the trustee may set them aside until he or she has time to do it.

By contrast, making just three calls seems doable and is therefore put on the short list. When the individual completes the three calls, then you can feel free to ask for more. Loading the trustee up with too much to do at once is a recipe for disappointing failure.

My friend Michael Guillot, CFRE, Vice President for Development at North Carolina Symphony also has a simple focus. He says to "do one thing at a time. Focus on quality, not quantity. I would rather have each board member doing one task a month for our philanthropic programs than have them struggle with too many actions that never get done."

Use your valuable board members carefully where you need them most, and where they will do the most good.

Mistake Three: Cold or "Cool" Calls, Which Are Rarely Successful If you send trustees out on calls that do not have a high likelihood of succeeding, they will experience defeat rather than success. Cold calls are the worst possible place to use the energy and good will of your kind-hearted board members, because cold calls have the highest rate of failure.

Passion-Driven Fundraising will not subject your board to this kind of rejection, which will incline your board members never to venture out for you again! Preserve their fragile self-esteem and protect them from negative responses, if you want their continued help. Why would they keep beating their heads against a wall if they are rarely successful?

Send them on easy calls that will create fun, shared vision, and passion for your organization, calls that will make them happy and give them confidence. *Send them on calls where you already know what the outcome will be.*

Send them out to make friends for your organization, and engage the community with their passion. Set them to load everybody into that bandwagon that they are driving!

> *Where I have not been comfortable in fundraising is when I have been asked to send annual fund mailings or to solicit friends who are not familiar with the organization or who otherwise are in need of cultivation.*
>
> —Former Board Chair

I work hard to preserve my board members' good feelings about being involved with fundraising. I nurture their interest, starting them off with simple tasks to encourage them such as thanking current donors or taking an assignment to cultivate someone at an event.

Then, after they develop some confidence, I will bring them along on a formal cultivation or solicitation call. I will rarely send board members out to solicit alone, and only if I think they are carefully prepared, experienced fundraisers.

Mistake Four: Lack of Training, Structure, and Support We send our trustees out with too little preparation and backup. We tend to forget that they are volunteers. They are not the pros at this that we are. Passion-Driven Fundraising will give them thorough training to correct their misconceptions about fundraising and to pump them up with confidence to venture out into scary fundraising territory.

Do not make the mistake of assuming that your board members understand fundraising, or how to talk about your organization. Be sure they have a solid understanding of the underlying philosophy of fundraising—developing donors/investors/partners who will stick with your organization for the long run.

They need—and deserve—first-rate support from staff. You will find that board members deeply appreciate this kind of backup. They need clear goals, a clear organizational structure, and inspiration to wake up their passion and deep personal commitment to your organization's success.

Mistake Five: Emergency Fundraising, Not Long-Term Relationships I am all for a sense of urgency when setting out to raise funds. However, I have seen too many organizations wait until there is a financial crisis or emergency to ask board members for help.

At such times, board members are asked to pull in some money quickly in order to fill a budget shortfall or cover some major financial loss. Again, this sets them up for unpleasant fundraising experiences. They are sent out with little training and usually manage to approach the job from the wrong perspective.

In these cases, they will usually create a conversation about "money," not about a vision for a stronger, healthier community or a better world. This misdirection causes fundraising to be placed on the wrong plane, leaving board members with a distasteful experience that could have been avoided.

Mission Possible—A Better Way!

Of course, none of us can wait for the perfect board—or the perfect staff—to do our fundraising. I have raised a lot of money for many different organizations in my day, and most of these organizations had issues or "warts" on the inside.

We did not have the luxury of delaying our fundraising until any internal problems were smoothed out and all parts of our organizational system were working smoothly. We had people to serve and important work to do that could not wait. We had to go out there and raise money anyway.

You cannot expect to fix everything in your board and your organization, ever. You have to operate as a "going concern" and do the best you can do all the time. Don't let internal organizational challenges hold you back from your very best efforts at fundraising.

There *Is* a Better Way!

There *is* a way to engage board members' hearts, minds, and passion for fundraising. We *can* find a way to activate them and create the energy that will fuel a new passion—an on-going commitment to tackle something they deem vitally important.

With the approach of Passion-Driven Fundraising, we can overcome both major obstacles that stand between our board members and fundraising. We can transform their attitudes about money and fundraising, and we can also generate excitement about what they want our organizations to be accomplishing *now*.

The Passion-Driven Fundraising approach has four steps:

Step 1: **Focus your board** on the mission and much closer to the work at hand.

- We will learn how to re-engage your board members by focusing them on real outcomes and results, giving them substantive work and—most of all—meaningful board meetings. We will learn how to foster a sense of community and collegiality among your board members so they can work seamlessly together.
- We will give them "mission moments" to reconnect them with their passion for the cause. We will learn how to bring them back in touch with their desire to make a difference out there in their communities and in the world.

Step 2: **Inspire your board** members by literally re-defining fundraising as *making friends to change the world*. We'll show them how to start friendraising and piling everybody on their bandwagon.

- We will learn a deeper philosophy fundraising that is full of power to make anything happen—the power of a bold vision, of new, creative energy and of volunteers working only out of the goodness of their heart.
- We will learn how to overcome their fears of fundraising and introduce them to the joy that donors experience when they give to something important.

- We will tackle head-on the attitude of scarcity that pervades many boards, and learn how the mindset of abundance will bring success. There *is* enough for everyone!

Step 3: **Ready your board** with the right tools and skills. We will learn about fundraising from the donor's point of view—when board members shift their focus to the donor, they can help keep donors happy and involved with your organization for the long haul.

- We will take the emphasis away from soliciting and show board members all the other ways they can contribute in fundraising without "asking" but that still make a direct impact on the bottom line.
- We will give them an experiential tour of the fundraising cycle, so they understand how we do what we do. They will begin to see just how little time is spent in the "asking" phase of the cycle, compared with all the many other activities we undertake with our donors.
- We will equip them with the right things to say and the right way to say them. Since many board members do not know how to talk about their organization, we will discuss the all-important elevator speech in detail, and learn how to make this process fun for everyone.

Step 4: **Engage your board** members in your fundraising plan by finding specific, appropriate roles for each person. Create the right kind of support structure to help them be productive and sustain change for the long run.

- We will discuss practical methods for setting your fired-up board members to work, opening doors, making connections, reaching out, and helping to bring new supporters into your nonprofit.
- We will show them how to build social capital for our organization and how to be personal advocates for our mission wherever they go.
- We will learn how to use Advice Visits to get in the door to prospective donors. Learn how board members can host Small Socials and Mission Based-Tours to build your organization's network and clout in the community.

And in the last chapter we will discuss how to set up your board members to win by enlisting a Dream Team board of the right people with the right outlook and skills.

- We will learn how to set expectations early in the game, including clearly defining the board's specific fundraising responsibilities and orienting new members appropriately so they can hit the ground running.
- We will learn how to set up a management structure for the board itself—the Governance Committee, along with the right kind of self-assessments that will monitor—and encourage—board performance.
- We will learn how to solicit your board members properly and thoroughly, so that they all make proud personal gifts to your cause each year.

Before long you will have board members who are raring to go, who, like my friends at the Ronald McDonald House of the Rio Grande Valley, love to tell their story to anyone who will listen, who are stepping up to foster relationships with donors and who *know* people will want to support them.

NOTES

1. Richard P. Chait, William P. Ryan, and Barbara E. Taylor, *Governance as Leadership, Reframing the Work of Nonprofit Boards* (Hoboken, NJ: John Wiley & Sons, 2005).
2. Chic Dambach, "Good Intentions," Board Member, BoardSource: November/December 2006, *BoardSource*.
3. Margaret Wheatley, *Leadership and the New Science* (San Francisco: Berrett-Koehler, 1999).
4. Pamela Wilcox, *Exposing the Elephants: Creating Exceptional Nonprofits* (Hoboken, NJ: John Wiley & Sons, 2006).