



# The Do's and Don'ts of Getting Boards to Fundraise

Why your board isn't fundraising and how to fix it



# THE #1 REASON MOST BOARD MEMBERS DON'T FUNDRAISE AND 3 WAYS TO FIX IT

Why do so many board members not fundraise? Do these people have some kind of allergic reaction to fundraising?

No. And no, there is no such thing as being allergic to fundraising. The #1 reason board members aren't fundraising isn't their fault, it's ours.

Warning: this is a bitter pill. It may be hard to swallow.

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**We bear some responsibility for why our board members aren't fundraising.**

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Ask most board members if they were told they'd be responsible for fundraising when they joined the board and you'll hear a lot of no's. Somewhere in the recruitment process, the fundraising part of their job got downplayed. Maybe it wasn't you, maybe it was a board member who let them off the hook.

On top of that, you likely have several board members brand new to board service. That means zero experience as a fundraising board member. Before you get excited about the board member that has prior board experience it's worth noting that doesn't necessarily mean their board gave them any fundraising training! Odds are none of them have ever worked for a nonprofit before as well.

What does this mean?

- ⬇ We have to be 100% upfront with them about our fundraising expectations
- ⬇ We have to teach them how fundraising works at our organization
- ⬇ We have to train them to be great at fundraising



# HOW TO INTRODUCE BOARD MEMBERS TO FUNDRAISING IN 3 EASY STEPS

A board member who openly embraces fundraising and is a model example of it needs to openly discuss the fundraising expectations of board service during the board recruitment process.

This is a give-and-take conversation. We must tell the prospective board member what we ask of them and in turn, how they will be supported. For example:

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**“While you are on the board of XYZ organization we ask that you share your skills, time and talent. We ask that you bring a positive attitude to fundraising. During your term on the board, we ask to be one of your top 3 philanthropic commitments. What you can expect from us during your time on the board is lots of training and support to be effective in fundraising as well as plenty of options and choices in how you engage in fundraising.”**

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You can't just say that you offer training and support in fundraising. You must provide it. This could be a mini 5- or 10-minute training at each board meeting and training at your annual board retreat. Bringing in other board members in your community to speak at your board meeting on how their board supports fundraising is another excellent way to train your board (and introduce a little peer pressure) at no cost.

Finally, the board agreement needs to offer them a variety of options for how they can engage in fundraising. Think of your board agreement it as an a la carte menu of all the ways they might support fundraising and let them sign up for what interests them most. Baskin-Robbins boasts 31 different flavors of ice cream. Offer at least 15 different ways to support fundraising at your organization. Having something in writing that you can offer a prospective board member makes the conversation easier. Providing options is a great way to start the conversation and it allows members to sign up for what appeals to them. Fundraising is not a one size fits all endeavor. You likely have some board members who are introverts and others who are extroverts. Giving them options lets them choose the opportunities that are right for them.



# 2020 BOARD MEMBER PLAN

Thank you for stepping up as a board member to prepare girls for a lifetime of leadership! Your contributions as board member will build girls of courage, confidence and character who make the world a better place.

We don't take our mission (or your commitment) lightly. There's a lot to be done. We ask you to bring a positive fundraising attitude, your skills, time, and effort. While you're on our board we ask to be one of your top three charitable commitments. What can you expect from us? Training and support to be effective, a variety of engagement options to choose from and choice in how and when you give.

To accomplish this, we've crafted an "all you can eat" menu of philanthropic opportunities to give board members lots of variety in how you support our mission. Please select what interests you and we'll follow up accordingly. We encourage you to mark all the areas that interest you.

### STEWARDSHIP

- Introduce myself as a Girls Lead Board Member at networking and community events.
- Write donor thank you cards (we'll give you sample scripts + materials)
- Call and thank donors (we'll give you sample scripts + donor information)

### CULTIVATION

- Invite the Executive Director or Development Director as my guest at a community/business event.
- Serve as a table captain at the Inspire a Girl brunch and fill my table.
- Organize a group of friends and/or colleagues for a girl event, or volunteer workday
- Introduce my company's leadership to the Executive Director or Development Director.
- Join staff on a discovery visit to get to know prospective donors and their interests.
- Post Girls Lead events to my social networks.
- Make a "personal treasure map" identifying 5-10 people to invite to: a free feel good cultivation event, Girls Lead activity, or breakfast/lunch/meeting with the Executive

Director or Development Director.

- Host event in my home to introduce Girls Lead to my network. Best month(s): \_\_\_\_\_
- Identify potential donors (individuals, organizations, business, etc.) and share their contact information with staff.
- Be assigned up to 3 major gift prospects to cultivate through personal visits and or phone calls.

### AMBASSADOR

- Be a greeter at the Inspire a Girl brunch.
- Recruit committee members for Inspire a Girl.
- Bring interested friends and acquaintances for a tour of our facility.
- Bring interested friends and acquaintances to hear a presentation from staff or outside speaker.
- Use my social networking resources to send out information on the organization or an issue we are dealing with to my network of friends for the purpose of raising their awareness of our programs.
- Identify opportunities to introduce our Executive Director or Development Director as a speaker.
- Write (or record) my own personal story about why I serve and give to Girls Lead.

### ASKER

- Write personal notes to addressees on fundraising letters. (Sample notes might read "I hope you'll join me in supporting Girls Lead" and can be written on the top in ink or added with a post it note)
- Initiate conversations with potential donors for the purpose of assessing their interest in making a gift, update staff accordingly, help advance the relationship and participate in making the ask.
- Use my social networking resources to asks to my contacts to give.
- Write personal emails and/or make personal phone calls to invite people to become donors.
- Serve on the Inspire a Girl "Sponsorship Committee" or "Champions/Host Committee" as a solicitor of sponsorships using my contacts or contacts provided to me.

Did we leave anything out? If you've got ideas for other ways you want to engage tell us here!

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Thank you for your service!

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

# THE DO'S AND DON'TS OF GETTING BOARDS TO FUNDRAISE

When it comes to getting board members to fundraise there are some things you SHOULD do and other things to avoid.



## DO'S

1. Be clear and specific about how board members are asked to contribute. Have an open conversation during the recruitment process led by a board member with a positive attitude towards fundraising where you share the fundraising expectations of board members. Offer a fundraising “menu” boasting a wide selection of fundraising opportunities in writing.
2. Share the outcome of their cultivation. At one charity board members are asked to invite prospective donors for an introductory tour of the organization. When thanking board members, the staff shows them that the average gift by a person who has been on the tour is \$3,000 compared to the average gift from a person who hasn't taken the tour (\$150).
3. Make it FUN. You expect a lot from your board members. How do you make serving on your board fun and rewarding? Tap into their motivational drives, give them rewards, recognition, and special privileges. Many of your members likely joined to expand their professional network so make sure you give members time to enjoy each other socially.

## DON'TS

1. Don't circulate a list of wealthy, well connected influential and important philanthropists in your community and ask each board member to write their names next to the ones they know. Board members hate this. It puts them on the spot and can potentially embarrass them. They feel “hit up” if they do know these contacts or awkward and sheepish if they don't. Fundraising is not a one-size-fits-all type of activity.

## What to do instead

Research your board members' network on LinkedIn and identify which connections you want to request a personal introduction to via email. Ask and share your intentions with your board member, i. e. "I'd love an introduction to Julie at Dropbox so that I can invite her to our upcoming open house." Keep them in the loop and follow up with your board members to let them know what response you did (or didn't get).

- ④ If you have board members who frequently have a table at an event ask if you can be their guest at the table. Work the room with them and brag on their participation as your board member.
- 2. Don't assume that just because they have prior board experience, they understand fundraising and are ready to be a great fundraiser.

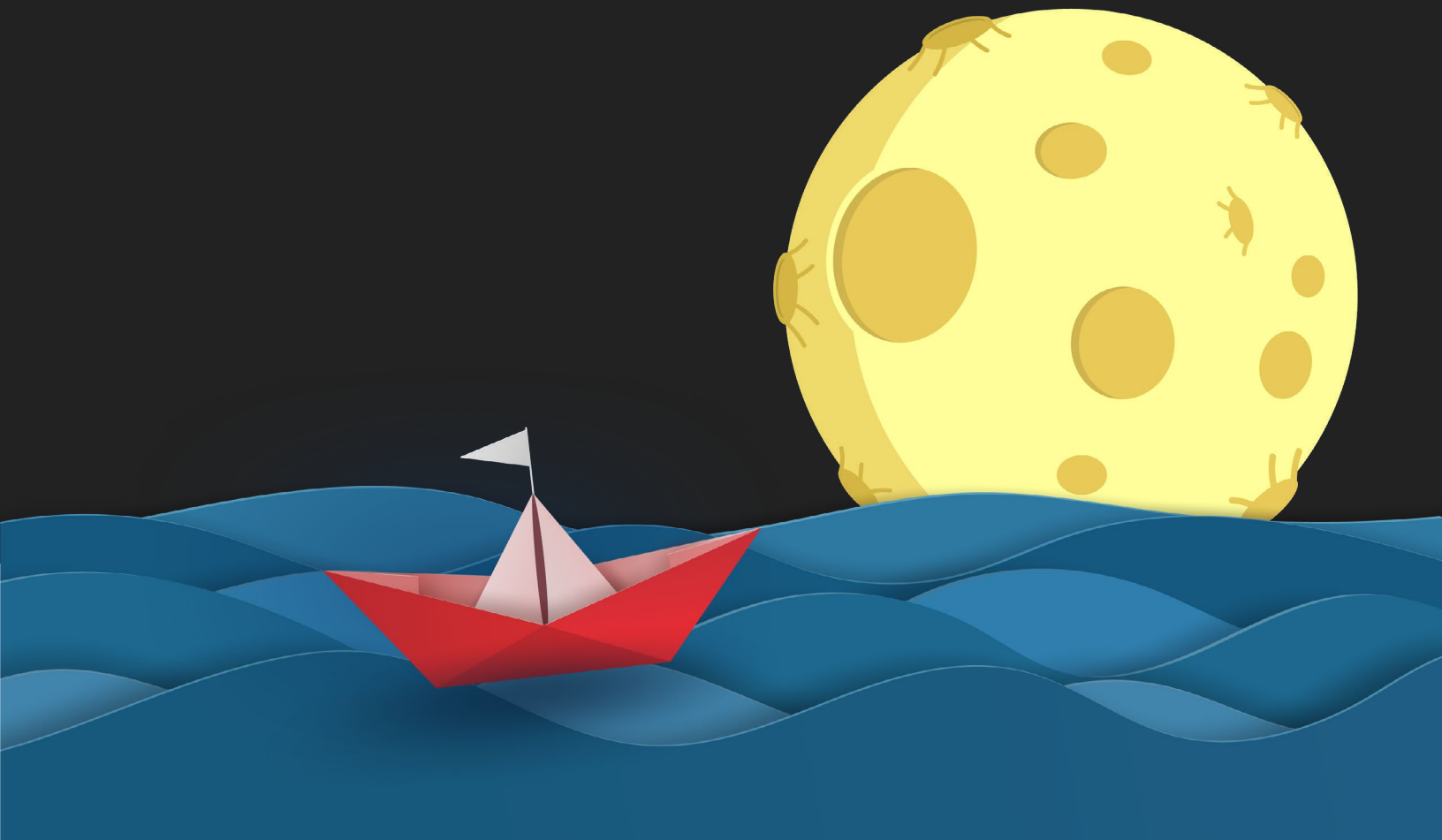
## What to do instead

- ④ Include an element of fundraising training in your board meetings. Start out with your mix of revenue sources, especially fundraising, and how your organization compares with the national trends in giving from Giving USA. Your board members may not understand how fundraising works in your organization or how your fundraising goals are set. Highlight where board members can add the most value to the fundraising program and how staff will support them in the process.
- ④ Have program staff and clients share impact stories and testimonials.
- ④ Invite successful board members from other organizations to come talk to your board about how their board members fundraise. This is not only effective, it also free!
- ④ Invest in professional development for your board. Have an annual board retreat with fundraising training by a professional trainer. A trainer can energize your board and boost their skills and self-confidence. As an outside expert working with hundreds of organizations, they represent established fundraising best practices and trends. Their opinion can go along way to persuade your board. They can also have the tough conversations that you may not be able to whether it terms limits, participation or fundraising.
- ④ Invite board members who have successfully introduced the organization to a new potential supporter tell the story of how they did it. Interview them with questions like, "How did it come about? What did you do? What made it work? How did you feel about it?" Again, these personal stories don't have to be limited to your board. Bring in board members from other organizations.

- ④ Always make it easy for them to fundraise. For example, during your end of year campaign send board members a weekly fundraising message that they can personalize and send out to their network of prospects. Send them progress updates or client stories they can use for stewardship and cultivation.

### **BOARDS ARE ALWAYS EVOLVING**

Your board members are not going to wake up tomorrow and start soliciting donors. You have to mobilize them, train them, coach them and provide support. Fundraising is staff-led, and board supported. Engaging board members in the mission and empowering them to fundraise is in your grasp but you must properly train and motivate them. If you don't invest in them, they can't ultimately serve you.





## ABOUT RACHEL MUIR, CFRE

Rachel has worked every side of the Rubik's cube that is the nonprofit sector. She has served on numerous boards and has the T-shirts (and scars) to prove it. When she was 26 Rachel Muir launched Girlstart, a non-profit empowering girls in math, science, engineering and technology in the living room of her apartment with \$500 and a credit card. Several years later she had raised over 10 million and was featured on Oprah, CNN, and the Today show. Today Rachel delivers keynotes, custom trainings and board retreats that transform people into confident, successful fundraisers. Learn more about Rachel at [www.rachelmuir.com](http://www.rachelmuir.com)



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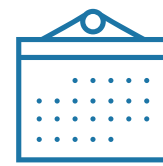
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## ABOUT BLOOMERANG

Bloomerang helps nonprofit organizations to reach, engage and retain the advocates they depend on to achieve their vision for a better world. Our cloud-based donor management software is rooted in principles of philanthropy, simple to use and focused on empowering your team to achieve remarkable results through enhanced donor loyalty. Learn more about Bloomerang at [bloomerang.co](https://bloomerang.co)



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