

BOARDS & FUNDRAISING: **Why They Hate it &** **What to do About it**

For Kindful
September 22, 2021



SARAH  LANGE

Today, we'll discuss:

- The Problem: Your board HATES fundraising (or at the very least, they don't particularly like it)
- Solutions: I'll teach you changes you can make to improve your board's performance, particularly as it relates to fundraising
- Q&A





How's Your Board Doing?

Type in the chat:

- Green – we're rockin' it!
- Yellow – we could use some help
- Red – I'm feeling confused and hopeless

Don't worry – if your board's in the yellow or red zone, there's hope (and help)!



Boards Have Life Cycles

Let me know in the chat:

- Green – 100% of our board members have served on a nonprofit board before
- Yellow -- At least 25% of our board are newbies
- Red – no one seems to have a clue about what they're doing

How many of your board members have worked at nonprofits? Let's remember, the nonprofit industry IS a little quirky. We have these vague, ethereal missions, and get our money from different sources, so it's no wonder our board members are confused. Also – jargon!



Board Training

Let me know in the chat how often you offer board training:

- Green – at least twice/year
- Yellow – less than once/year
- Red – never

Who offers that training – staff or an outside professional?

Staff have lower credibility when it comes to training, because board members believe they're vested in a particular outcome. That doesn't mean you can't do education and coaching...



Things to Know

Managing a volunteer board is challenging. In order to increase our fundraising capacity, however, it's crucial for us to engage our board!

"Many hands make light work."

Your board WANTS to succeed – they're on your board for a reason. It's up to us to put them to work in a way that furthers our mission.

WHY YOUR BOARD HATES FUNDRAISING



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Why Your Board Hates Fundraising – Oh, Let us Count the Ways!

Board members are not professional fundraisers.

Boards are comprised of volunteers, who may or may not work in the nonprofit sector, and often do not have experience, skills or expertise in fundraising. *They don't know what they don't know.*

Fundraising is a very specific set of skills that must be learned and practiced. Have you taught your board how to do fundraising?



Why Your Board Hates Fundraising (2)

Your board members are freaked out about money.

What are the top three taboo subjects in the US? Religion, politics and MONEY. From a young age, we're trained not to ask or talk about it. As a result, most of us are not as knowledgeable about the subject as we could be.

Most of us are TERRIFIED by the prospect of asking other people for money. Your board is no different.



Why Your Board Hates Fundraising (3)

We ask them to trespass.

We frequently expect board members to solicit donations from and sell things to their friends, families and co-workers. In doing so, we are asking them to trespass on their personal relationships. How many of you would be comfortable doing that? Never ask someone to do something you yourself would not do!



Why Your Board Hates Fundraising (4)

We never told them it was their job.

When recruiting board members, are they told what their roles and responsibilities will be – including those related to fundraising?



Going in Blind

“You wouldn’t hire a staff person without explaining the job and performance expectations in advance. The same holds true for recruiting board members.”

- Simone Joyaux, Firing Lousy Board Members



Why Your Board Hates Fundraising (5)

We forget they're volunteers and underestimate the work it takes to provide adequate support.

We frequently expect board members to fly out of the fundraising nest and soar. Without ongoing training and support, they're more likely to crash to the ground. Ouch.



Why Your Board Hates Fundraising (6)

They think that soliciting gifts is the only way to participate in fundraising.

While some board members may enjoy asking potential and current donors to invest in your work, there are those who need other ways to help you raise funds. All board members have a role to play in fundraising. And don't forget about cultivation and stewardship. Board thank you calls to donors have an incredible impact on retention rates.



Why Your Board Hates Fundraising (7)

They don't know how to talk about your organization and why it deserves donor support.

Board members may have the inside scoop on your nonprofit, but that doesn't mean they're good at making the case for support. Make sure new board members receive a good orientation when they begin their board service. Have an annual all-board review of your organization's history, programs, and organizational needs to regularly update members about your latest successes, challenges, and opportunities.



Why Your Board Hates Fundraising (8)

They fear rejection.

We all do! At first, many fundraisers feel that asking for a donation is “begging,” and board members are no exception. Encourage your board members to share their passion for your mission when they speak with others. They’ve made their own commitment for a reason. Their passion will be inspiring to others. The more times a board member hears that magic “yes,” the more comfortable they’ll become.



Other Reasons for Failure

- They have busy lives.
- They don't "get it" because they're missing the full picture; context.
- They may lack a connection to the mission. This will dampen their enthusiasm, for sure!
- They don't understand nonprofits and/or fundraising (we're a quirky lot and fundraising is weird!)

WAYS TO FIX THE PROBLEM



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BUILDING YOUR BEST BOARD IS THE #1 SOLUTION



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It Starts with Recruitment

- Board recruitment must be a planned, ongoing, strategic process, not just something that happens a month before your annual meeting.
- Base recruitment on strategic diversity vs. personal connections (use the Board Recruitment Matrix and the VIP Exercise– I'll share these with you later and will be emailing them to you after the training).
- Passion for your mission should be the #1 criteria for board service! Pretty much everything else is teachable.

Board Recruit- ment Matrix

BOARD RECRUITMENT MATRIX

CHARACTERISTIC	CURRENT MEMBERS	POTENTIAL MEMBERS
AGE		
Over 60		
45-60		
30-44		
Under 30		
GENDER		
Male		
Female		
Trans, Gender Fluid, etc.		
INCLUSIVITY		
African-American		
Latino/Hispanic		
Asian		
Native American		
Caucasian		
Multi-racial		
Geographic		
Area/Neighborhood		
Income Bracket		
SKILLS		
Admin/Management		
Public relations		
Finance		
Fund raising		
Business/Economics		
International Affairs		
Government		
Law		
Technology		
Entrepreneur		
Connections		
Wealthy		
Other:		
Other:		



Orientation & Onboarding

Use board agreements to ensure that everyone's on the same page from the outset.

Here are the 4 elements you need to include:

1. Individual Gifts the Board Member is Expected to Make.

Detail your annual fundraising events, indicating where participation is mandatory, as well as areas where giving is encouraged, i.e. stretch gifts



Orientation & Onboarding (2)

- A job description of what is expected of them
- A description of committees and details on committee service expectations
- Your By-laws
- Your annual operating budget
- A program overview
- Current financial statements
- Your most recent audited financials and annual report
- Board member directory and profiles



Orientation & Onboarding (3)

2. Fundraising the Board Member is Expected to Perform on Behalf of the Organization.

List all the ways a board member can be involved supporting fundraising. Detail here is key. Allow board members to sign up for specific roles e.g. making phone calls, conducting visits, bringing guests to events or in for tours, spearheading events, making a regular and/or planned gift, volunteering for specific events/campaigns, etc.

This is a great place to include your annual fundraising budget broken down by revenue areas and goals.

I use the menu approach so people can sign up for activities that fit their skills, availability and comfort level.



Orientation & Onboarding (4)

3. Program/Event Attendance.

Having board members attend programs gives them a front row seat to your mission in action and empowers them to be informed and enthusiastic spokespeople for your cause.



Orientation & Onboarding (5)

5. Committee Participation

List and describe your committees with an option for them to select and rank their choices. Make sure your committees are based on your strategic plan, and that you don't just have committees for the sake of having committees.



Onboarding

Other ways to set your new board members up for success:

- Provide them with a thorough orientation to the agency, its mission, staff, programs, etc.
- Provide them with a Board Buddy
- Have the board President do a check-in at 3, 6 and 9 months
- Check in with all board members at year-end to make sure they want to continue (you may need to release them from service)



Introducing Your Board to Fundraising

- How does fundraising work in your organization?
- Share the tactics you use, the mix of funding sources and your goals
- Allow your board to set its own goals for each area of fundraising to which you expect them to contribute (you might be surprised!)
- Explain their role (general and specific – use a menu – I’ll share one with you shortly)
- Talk about how and where they can add value
- Ask them what kind of training and support they need



Back to That List of Problems...

- **Problem:** Your board is not comprised of professional fundraisers
- **Solutions:** Provide them with information, education, training, coaching and support so they can succeed in their role. Send them to conferences. Send them links to webinars. Make sure fundraising is on every single board meeting agenda. Ditch the Fundraising Committee!



Problems/Solutions (2)

- **Problem:** Your board is freaked out about asking for money!
- **Solutions:** Things your board should know:
 - The Joy of Giving – dopamine button = neurological high! Donors are 43% more likely to say they're "very happy" vs. non-donors.
 - Agencies do not have needs. Yes, I just said that. Your donors have (philanthropic) needs. Your clients have needs. Your nonprofit is the bridge.
 - 63% of people donate to a charity they've heard of through a friend, relative or social connection and donors feel happiest when they've contributed in this way.
 - Most people WANT to help, but often don't know what that looks like or what kind of help is needed. It's our job to direct their philanthropic instincts!
 - We're not asking someone for money – we're inviting them to make the world a better place, which is an innate human desire.

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There is a TON of money out there...and most of it is contributed by your “Average Joe” (actually, Jane is driving the philanthropy bus...always has been...)



In 2020, giving rose 10.6%

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Problems/Solutions (3)

- **Problem:** We ask our board members to trespass on their relationships.
- **Solutions:** Use the VIP Exercise and the fundraising menu to allow them to select the ways to contribute that fit with their temperament (introvert/extrovert), schedule, skills, comfort level, etc.



VERY IMPORTANT PERSON (VIP) EXERCISE

VERY IMPORTANT PROSPECT (VIP) EXERCISE



KEY QUESTION:

"Who are the people who can help catapult our future?"

You might as well start at the top. Think BIG! Think BROAD! Identify people who could, with very little effort, help catapult the organization to a whole new level of impact.

These people are the civic, political, philanthropic, religious, corporate or social leaders in your community and should be your top priority in terms of donor solicitation. They tend to be generous with their time, treasure and talents, but of equal importance, they are important opinion leaders who can influence many other people.

Instructions:

PART ONE:

Take out a small sheet of paper.

Identify 5 - 10 people you know of who could catapult our organization to the next level. Think BIG. DREAM! The only caveat is that they have to be people your organization could reasonably approach.

Next to the person's names, put down some ideas on how to get to these individuals. You DO NOT need to turn in your list – this is purely to stimulate your own thinking.

PART TWO:

Pair up and discuss some of the names on your list. (5 minutes)

PART THREE:

Return to the large group. What was that experience like?

Assemble all the names on one sheet of paper where everyone can see them. Review the list name by name, ranking each name:

A – someone in the room knows this person, feels they would be very open to having a conversation about getting more involved with the organization. Place that person's name next to the VIP.

(CONTINUED)

BOARD MEMBER FUND- RAISING MENU



INDIVIDUAL FUNDRAISING PLAN FOR BOARD MEMBERS



Fiscal Year: _____

NAME: _____

THANK-A-THON: Spring 2013

☐ I agree to come to Abby's House to make calls, thanking our donors for their support

BUY-A-BED CAMPAIGN: January - December 2013

- ☐ I will sign out a Buy-A-Bed box and secure at least \$_____ in donations
- ☐ I will make a gift that matches the amount collected in my Buy-A-Bed box
- ☐ I will organize campaign participation with a group(s) of which I am a member
- ☐ I will help spread the word about the campaign with friends, family, co-workers, etc. using word-of-mouth, email and/or Facebook
- ☐ I will attend the end-of-campaign celebration (December 2013)

CORPORATE GIVING (year-round, but preferably by March 1, 2013)

☐ I am suggesting we approach the following businesses/corporations for support:

☐ I am able to serve as liaison to the following corporations/businesses:

☐ I would like to participate in photo opportunities as often as possible

JET BLUE RAFFLE: Spring 2013

- ☐ I will purchase at least _____ raffle tickets
- ☐ I will sell at least _____ raffle tickets



Problems/Solutions (4)

- **Problem:** Board members don't know what we expect of them or what to expect from us.
- **Solutions:** Uplevel your recruitment, orientation and onboarding processes. Check in with board members on a regular basis to make sure they're clear about expectations (and that you're clear about theirs!) Remember, this is a two-way street – don't just dump them in the deep end of the pool, give them swimming lessons!



Problems/Solutions (5)

- **Problem:** Board members don't receive the level of support they need to succeed.
- **Solutions:** Provide them with information, education, training, coaching and support so they can succeed in their role. Send them to conferences. Send them links to webinars. Make sure fundraising is on every single board meeting agenda. Survey your board annually about their level of knowledge, comfort and confidence!



Problems/Solutions (6)

- **Problem:** Board members think that asking for money is the only way to engage in fundraising.
- **Solution:** Here are 10 ways your board members can engage in fundraising without having to ask for money:
 1. They can give personally (100% giving, gifts that reflect capacity and commitment, in the top 3, etc.)
 2. They can all donors – board members LOVE thank-a-thons! You can use the 1st 10 minutes of your board meetings to make calls (that way, you KNOW they get done! ;)



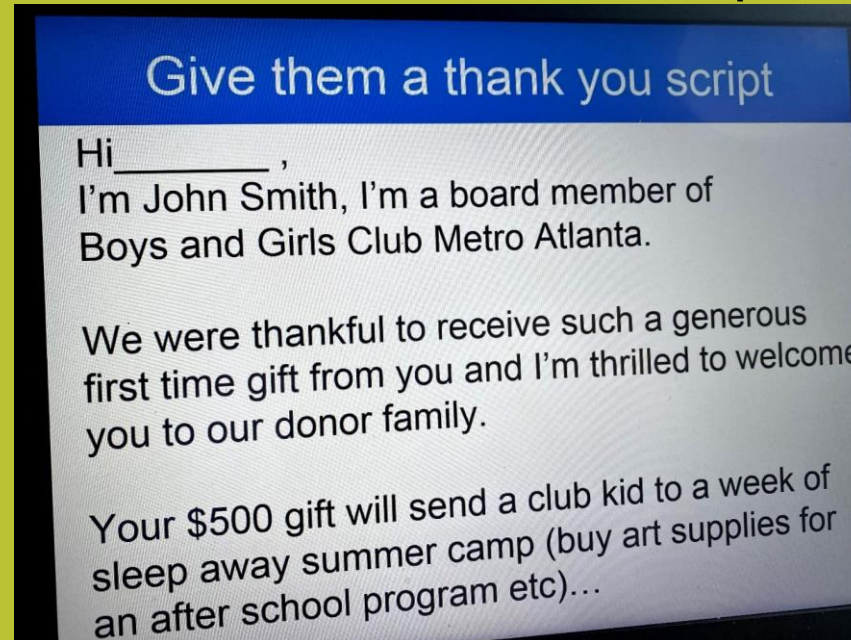
Problems/Solutions (6a)

- When donors receive a thank you call from a board member within 24 hours of making their gift, donors increase their giving by 39%! Fourteen months later (provided you stay in touch with them), the donor's giving has increased by 42% and there's a 70% retention rate! (Penelope Burk)
- Your board members will need a script, contact info, brief giving history, relevant notes about the donor, and a "win" the donor made possible (impact story).



Problems/Solutions (6b)

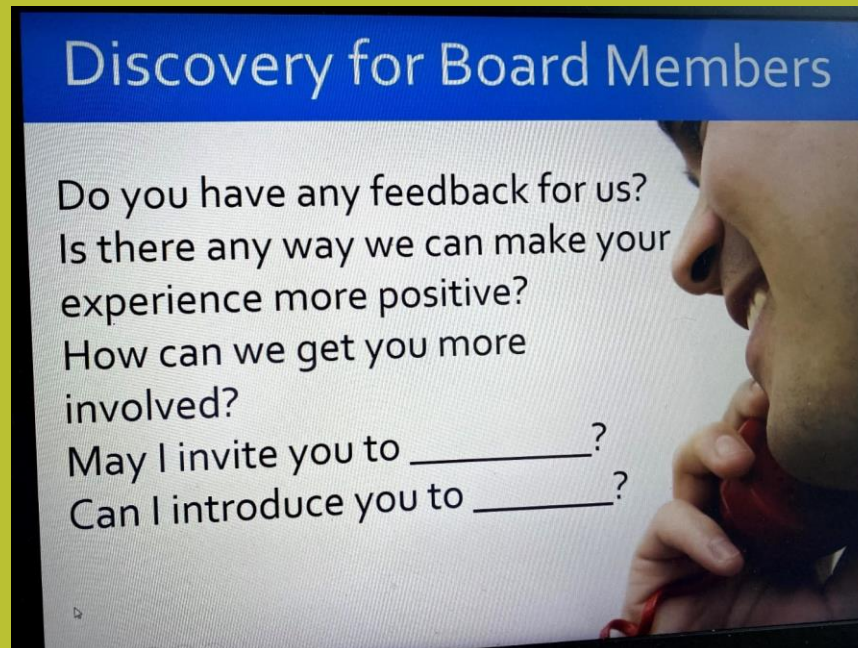
- Be sure to provide your board members with a script! Here's an example (Andy Robinson):





Problems/Solutions (6c)

- Encourage them to ask Discovery Questions if they “land a live one”!
Here’s an example (Andy Robinson):





Problems/Solutions (6d)

3. They can name you in your will (the best place to start an estate planning program is with your board!)
4. They can invite people they know to take a tour of the organization (HIPPA, minors, etc.)
5. They can host a cultivation event at their home. It's likely staff will play a central role in this.
6. You can give them 3 donors to cultivate. This will require clear expectations and appropriate support.



Problems/Solutions (6e)

7. They can take on a project designed to raise awareness about the organization (30 day social media challenge, email campaign, etc.)
8. They can share how donations create transformation.
9. They can share client testimonials, impact stories, data, client success stories, etc.
10. They can write a letter to the editor, article, blog, etc. to talk about why the organization is important to them and invite others to support the cause.



Problems/Solutions (7)

- **Problem:** They don't know how to talk about the organization.
- **Solutions:** Provide your board members with the case for support, impact data, success stories, etc. Encourage them to follow you on social media. Help them develop their own "elevator pitch" by focusing on the following questions:
 - Why do I give up my precious time to be on the board?
 - Why this agency vs. another?
 - What do I get out of contributing to this organization?

Sharing from our hearts is the fastest way to connect to another person's heart. And here's a secret: Philanthropy is a heart-centered activity!



Problems/Solutions (8)

- **Problem:** Your board members fear rejection.
- **Solutions:** Well, at some point, someone's gonna say NO. Let them know that it's not a personal failing – it's almost always about the donor, not the person who asked (ex: BUSSW 85th Anniversary Campaign).
- Overcoming fear of rejection takes time and comes with practice, along with an increased level of comfort and confidence in one's fundraising skills.
- Provide your board members with the opportunity to develop and practice their pitch. Be willing to provide ongoing coaching, guidance, scripts, stories, data, etc. Make sure that at least some portion of every single board meeting allows members to discuss sticking points and roadblocks (this is probably best done in small groups or pairs).



Problems/Solutions (9)

- **Problem:** They have busy lives.
- **Solution:** Well, maybe it's not the best time for them to be on your board – a committee, perhaps? Or, if they're really valuable, use them strategically.
- **Problem:** Your board members don't "get it" because they're missing the full picture.
- **Solution:** Provide updates, stories, data, etc. at every meeting. Encourage your board members to read your newsletters and follow you on social media. Have staff members attend board meetings on a rotating basis to provide program updates.



Problems/Solutions (9a)

- **Problem:** They lack a connection to the mission.
- **Solutions:** Information, information, information. Also, experience (tour, volunteering, etc.).
- **Problem:** They don't understand nonprofits and/or fundraising.
- **Solution:** Lucky for you, you're an expert on both! It starts with recruitment and is followed by a good orientation, proper onboarding, and ongoing training, education, and information!

Q&A



Remember!

Growth is uneven. Take it one step at a time – try one strategy, see how it works, then try another.

If you have questions, get in touch – I'm here to support you & help you succeed! Drop me an email at: sarah@sarahblange.com

Before you leave, I want to tell you about the free,
FUNDAMENTAL 5 FASTRACK YOUR FUNDRAISING CHALLENGE
that I'll be running from October 4-8!



The Challenge!

The Challenge will run from Monday, October 5 – Friday, October 8.

- Each morning I'll release a short minute video, sharing my top tips in a specific area of fundraising.
 - Monday: Dollars from Donors
 - Tuesday: Winning the Grants Game
 - Wednesday: Engaging Your Board in Fundraising
 - Thursday: Leveraging Social Media for Fundraising
 - Friday: Surrounding Yourself with Support
- You'll be given a **short** homework assignment, designed to help you think through your next steps.
- You'll be asked to post your results on the Challenge Facebook Page. When you complete your homework by 11:59pm (EST) of that day, you'll be placed into a drawing for the daily prize, which will include a signed copy of my book, *The Field Guide to Fundraising for Nonprofits*, and a donation to your favorite charity! Winners will be announced the following day. There will be other prizes, too!
- To learn more and register, visit: <https://newera4nonprofits.ac-page.com/challengefundamental-5>



THANKS FOR JOINING ME!

I hope I'll see you again soon!



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