

Involving your board members in fund development

It's your job to help board members do their job in fund development.

But who is "you"? The development officer. The executive director. The board chair. The chair of the board's fund development committee.

Let's start at the beginning, with this caveat: You won't find all the answers in this article. For more, see resources in the sidebar.

First, what is a development officer? (And if we hire one, why can't she do this work and leave us board members alone?)

No one – including your development officer – does this work alone. This is a team enterprise. Volunteers – especially board members – are particularly important. Why? Because volunteers are the heart of philanthropy. In fact, my favorite definition of philanthropy is "voluntary action for the common good."

You hire for expertise. The development officer provides the body of knowledge and best practice to ensure that your organization is doing the right stuff. Yes, fund development is a profession with research, documented principles, and ethics. To learn more about the right stuff, visit CFRE International, www.cfre.org. This fundraising certification organization documents what the body of knowledge is.

Your development officer leads and facilitates the fund development process. I describe this leadership and facilitation as "enabling." Enabling is the process of empowering others. Effective enablers clarify roles and relationships, identify and remove barriers, communicate to build learning, provide direction and resources, coach and mentor people to succeed. For more about enabling, see the sidebar. (By the way, your executive director ensures good governance by knowing governance principles and best practice – and enabling effectively.)

P.S. Your executive director hires the development officer and the development officer reports to the executive director.

What if we don't have a development officer?

Small organizations rarely can afford to hire a development officer. So that means your executive director serves as your development officer, too, doing all those development functions. (Yes, it's a tough life.)

What's the role of the board chair in fund development?

Leadership. Together, the board chair and executive director draw the board's attention to all its roles, including fund development. Together, the board chair and executive director establish a board-level fund development committee to help this focus.

Do we really need a fund development committee? No one wants to be on it. And anyway, what does the committee do?

The good news is: The fund development committee is not responsible for raising the money. Actually, the board is legally, morally, and ethically accountable for ensuring that the

money is raised. And the board cannot delegate that accountability to any other entity or person.

The fund development committee – in partnership with the chief development officer – helps institutionalize the process of fund development within the board. The committee helps develop the fundraising plan and helps engage all board members in doing some of the work. For details about the committee’s role, see the sidebar.

Role of the board

Did you notice my very important statement about the board’s accountability – liability, to put it most succinctly – for ensuring that money is available? Ensuring adequate financing is one role of the board.

Never forget this because too many do: There’s a critical distinction between the board and its individual board members. You must understand that distinction before this article can explore how to involve board members in fund development.

Here are the basic facts about the board. For more details, see the sidebar.

The board is a group made up of individuals. The board operates as a collective, with no single board member having any more authority than any other board member. Yes, that means the board chair has no more authority or power than any other board member. (If you have a rogue board chair, get rid of him or her! I talk about rogue board chairs – and destroying all executive committees – in weekly blogs on my homepage.)

The board is responsible for corporate governance. And corporate governance is the process whereby a group of individuals ensure the health and effectiveness of the corporation. Corporate governance only happens when the board is together, at its meetings. That’s why attendance is so critical. And that’s why infrequent attendance is grounds for dismissal from the board.

Corporate governance includes things like: articulating values and mission, and standards and controls; defining and monitoring key areas of performance; ensuring that adequate risk management is in place; hiring, appraising, and firing the executive director; and, ensuring that the financial structure is adequate.

To ensure adequate financial structure, the board – at its meetings – does things like: adopt a budget; adopt a fund development plan; define the parameters of board member performance in fund development; set fund development policies. And the board’s fund development committee – effectively enabled by the development officer – helps the board do these things.

Role of the individual board member

To create an effective board, you must hold your individual board members accountable. The board adopts performance expectations common to all board members. Yes, those expectations are common to all board members regardless of generation or gender, socioeconomic status or connections, or anything else. And before you nominate anyone to serve on your board, conduct a screening interview and secure commitment to the performance expectations.

Board member performance expectations include things like: support the values, mission, and vision of the organization; regularly attend board meetings and participate in strategic questioning and conversation; support decisions once made; maintain confidentiality and avoid conflict of interest; and, participate in philanthropy and fund development.

By the way, the best organizations evaluate board member performance annually. These organizations also evaluate governance effectiveness. See the sidebar for resources.

Board member role in philanthropy and fund development

What does it mean to participate in philanthropy and fund development? First, every board member must give a personal financial contribution every single year.

Personal ability and level of interest drive gift size. (And if you serve on a board, then your gift to that organization should be one of your most significant gifts.)

A board member – often the chair – solicits her fellow board members. Personalize the request to each board member, based on his or her financial capacity. For example, you might ask Bob for \$25. Bob is the single father of 6 kids. He works in the kitchen of the public school system. On the other hand, you ask Mary for more, lots more. Mary is the head of that big corporation in town.

Board members do more than give money.

Every board member helps identify those who might be interested in the organization. Board members do this over and over, forever.

For example: As a board member of the Women's Fund of Rhode Island, I identified women (and men) that I thought might be interested in leveling the playing field for women and girls. I know what interests my friends. For those who care about women's rights, I introduced them to the Women's Fund. I pay attention to what my professional colleagues talk about, what they do over the weekend, what bothers them in the news. For those who seemed to have an affinity for women's rights, I linked them to the Women's Fund.

A big reminder: Do not ask (or expect) your board members to trespass on their personal and professional relationships. Sure, Mary the head of the big corporation, is on your board. Yes, she does business with corporations and corporate executives. As a board member, Mary identifies those who might be interested in your cause – and Mary facilitates an introduction. Mary does not ask for favors from those she knows. Favor exchanges produce short-term money and bad feelings.

This is a big deal! Don't ask board members to trespass on personal and professional relationships.

And board members do more.

They help nurture relationships with those who might be interested, with those who are qualified prospects, and with donors. For example: Board members attend your organization's programs and fundraising events. When there, Board members schmooze with guests. Board members do not hang out with their friends and dates. Instead, board members mingle and greet people, engage in conversation and listen to guests. Then board members share what they've learned with staff.

Try these practical and successful ideas, too:

- Invite a board member to visit a foundation with you and share stories.
- Ask a board member to join you at lunch with a donor.
- Put some of your strategic thinking board members on the fund development committee.
- Recruit others to help plan the next fundraising event.
- Every board member can call donors to thank them for their gifts. This is just a thank-you call, not a prelude to another request.

And finally, board members can help solicit gifts. For example, board members can write personal notes on direct mail solicitation. The board member needn't know the letter

recipient. Just write a note: “Thank you for your support. I hope you’ll consider giving again.” Sign it Mary Smith, board member.

Board members can help sell tickets and recruit sponsors for your fundraising event. Some board members can go on a solicitation call and tell stories; staff can ask. Other board members can go together or alone and personally solicit gifts.

In conclusion

Often – perhaps usually – it’s hard to get the board and its individual members involved in fund development. And honestly, I don’t blame them. I expect many board members will feel uncomfortable, a bit awkward, and out of their depth.

There are so many bad activities in fund development – like asking people to trespass on their relationships. There are so many silly activities in fund development – like universalizing your own passion and trying to convince others to care.

But competent staff and caring leadership can change the bad dynamics. Good staff don’t promote bad activities. Effective enablers overturn unfortunate experiences.

Leaders help board members understand the value that they add to philanthropy and fund development. Leaders know this won’t be fun – and they don’t sell fun. Leaders help make it easier – or at least less worse – for board members. Leaders help board members care enough to overcome personal discomfort and convenience – and work for the good of the organization.

Resources

Visit www.simonejoyaux.com. Click on Resources and visit the Free Download Library for these resources:

- Job descriptions for executive director and chief development officer
- Role of the board and its fund development committee
- Performance expectations of the individual board member
- Governance self-assessment
- Board recruitment resources
- List of enabling functions and skills (For complete details and examples, see *Strategic Fund Development, 3rd edition*)

A few more resources:

- *Fired-Up Fundraising: Turn Board Passion into Action*, Gail Perry
- *Fundraising Mistakes That Bedevil All Boards (and Staff, too)* and *The Ultimate Board Member’s Book*, Kay Sprinkel Grace
- *Keep Your Donors: The Guide to Better Communications and Stronger Relationships*, Ahern & Joyaux
- *Strategic Fund Development: Building Profitable Relationships That Last, 3rd edition*, Joyaux
- *The Fundraising Habits of Supremely Successful Boards*, Jerold Panas

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