

Turning Board Members into Development Leaders in Five Easy Steps

by Jill Goldenberg and Cindy Rowe

When is the last time a board member said to you, “So, when can I start raising money? That’s the reason I joined the board!” If you’re like most of us, your board members are less than enthusiastic about fulfilling their duties to raise money. So, what can you do to get your board members excited about helping to make sure that your non-profit organization is financially stable? This article will take you through a 5 step plan to help convert your board members into willing and able development leaders.

The Status Quo

Let’s start at the beginning. If you’re involved in a typical non-profit, and you’ve asked your board members to help with development, chances are you’ve encountered some of these obstacles:

- * They have other priorities in their own jobs and personal lives, so they don’t set up solicitation meetings or do phone calls in a timely manner;
- * Board members who don’t want to be trained because they think they know everything about fundraising (or, the opposite – board members who are scared to engage in fundraising because they think they don’t know anything);
- * People who want to talk about campaigns, but don’t want to do the work; or
- * Board members who might participate in a solicitation, but can’t bring themselves to ask for the target donation amount, so don’t want to get involved at all.
- * Board members did not have the expectation when they were brought onto the board that they would need to fulfill the most basic of board member duties – bringing in philanthropy.

Creating a Culture of Philanthropy

When people come onto your board, what do they expect? Are you upfront with them about your expectations, or do you dodge questions about their role in development? If you don’t have a specific requirement for board donations, there’s nothing wrong with saying, “Yes, everyone on the board is expected to give a donation according to his or her personal ability. All we ask is that you make our organization one of your top three giving priorities. We also ask that you participate in the development process.” You’ll need to explain that development isn’t all about that one moment of the “ask.” It can involve being an ambassador for the organization, talking to potential donors about why the board member is passionate about the mission. It could be writing a thank you note. Thinking creatively, there are many ways for board members to enhance your development needs.

The Five Part Training Program

The Lawyers Clearinghouse provides *pro bono* legal services to nonprofit organizations and eligible groups seeking nonprofit status. Typical of many small non-profits, the Clearinghouse was supported by foundation and corporate donations, relying mostly on the Executive Director and board member law firms. When the Clearinghouse wanted to diversify its donor base, it needed to get its board members excited about their role in fund development. This five part

training was developed to help transition the board members into their new roles. The trainings took place over five consecutive board meetings:

1) *Laying the Groundwork*: First, we wanted to make sure that the board members understood the budget situation and the plan for growth, so that they knew why they needed to engage in development. To be sure board members could connect to their own passion for the organization, we got them talking about why they were on the board.

2) *Transforming Concerns into Advocacy*: This session focused on why board members themselves gave to certain charities, and elicited from them their own fears about raising money (and, provided answers and advice to combat those fears).

3) *Ambassadorship*: This discussion focused on the difference between “fundraising” and “development,” and the many different activities in which board members could engage to lead the organization to new donors and steward current donors.

4) *Following Up with Potential Donors*: In this session, board members got to think about what they would say to follow up on a fundraising letter, and started crafting an approach which made them comfortable. We also began thinking through potential donors.

5) *Face-to-Face Solicitation Training*: Finally, we spent time working with board members to take them through the steps of a personal solicitation, doing role plays to put them in the position of talking to a potential donor, and teaching them how to listen in these meetings for donor interests. We also thought through some matches for future donor meetings.

Since this training, the Lawyers Clearinghouse has seen a transformation in its board, with an increased comfort level among board members for reaching out to their peers, thinking about creative ways to involve people in the organization, and participation in stewardship opportunities. Creating this shift isn’t easy or fast, but in the end, will reap significant benefits for your organization in terms of board member engagement and organizational financial stability.

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