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The Staff's Role in Building the Board's Fundraising Capacity

Pamela Leland, PhD



Workshop Objectives



- To increase knowledge and understanding of the board’s “resource development” role
- To increase appreciation for the components and dynamics in board members’ participation
- To share methods and strategies for increasing board members’ involvement in fund development and fundraising

Different Words/Different Meanings



- Resource Development /Fund Development
- Fundraising
- Grantwriting
- Annual Appeals versus Annual Campaigns
- Special Events – GALA Events versus “other” events

*What are the definitions we use with our
Boards of Directors?*

Workshop Assumptions



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- Board members will contribute and participate in fundraising out of a sense of duty, responsibility or obligation. They ***will give more and participate more fully*** when there is passion and commitment.
- Boards are successful in fundraising because staff understand and execute their role as supporters to and facilitators of effective board participation.

Reasons for Lack of Participation



- Board members don't know or understand their responsibilities.
- Lack of leadership on these issues within the board.
- Board members don't feel they have “what it takes” (i.e., skills, networks or resources).
- They are afraid or overwhelmed.
- They are resistant.
- Lack of support from staff.

Need for Knowledge



- Knowledge about nonprofit governance
- Knowledge about the organization
- Knowledge about fundraising



Knowledge about Governance



- Dimensions of “fiscal stewardship”
- “Fund development is every board member’s responsibility”
- Governance versus management
- Connecting specific roles with life cycle and/or organizational capacity

Knowledge about the Organization



- Mission, vision, programs – locations !!
- Strategic goals
- Populations served
- Organizational “demographics”
- Mix and types of revenue



Knowledge about Fundraising



- How contributed revenue fits into the overall budget
- Your mix of contributed revenue – i.e., foundations, corporations and individuals
- General methods to generate contributed revenue
- Methods you use to generate contributed revenue – and why
- What difference contributed revenue makes to your organization

Lessons for Staff



- Foster culture of fundraising as “invitation” – not “prescription”
- Articulate a wide range of roles and activities in fundraising
- Provide clear goals and expectations
- Create methods and culture of accountability
- Incorporate time for reflection and self-assessment
- Don’t let them forget the real purpose
- Maintain communication with each board member

Need for Board Leadership



- Communicate the vision
- Rally the troops
- Peer relationship
- Model the behavior



Lessons for Staff



- “Own” the role of staff in effective board practice
- Recruit with eye toward passion ... and personality type
- Identify and cultivate board leaders
- “Name” those who will be fundraising champions
- Always be on the look-out for the next generation of leader(s)

Need for Skills Development



What are the skills that board members need to have? It depends on ...

- Fund development “life cycle”
- Types of fundraising strategies and activities
- Staff capacity

... What is needed in your organization ?

Lessons for Staff



- Recognize that people have different skills and abilities and personalities
- Recognize “skills building” needs and create processes to build/develop skills
- Assign different roles to different people
- Provide opportunities to shadow
- Provide the materials they need – cheat sheets, collateral, talking points, business cards, etc.
- Maintain communication with each board member
- Express appreciation

Overcoming Fear



What does fear look like? Why are they afraid?

- Anxiety (which is not the same as resistance)
- Fear of rejection
- Take it personally
- Express fear of consequences
- Prior bad experiences



Lessons for Staff



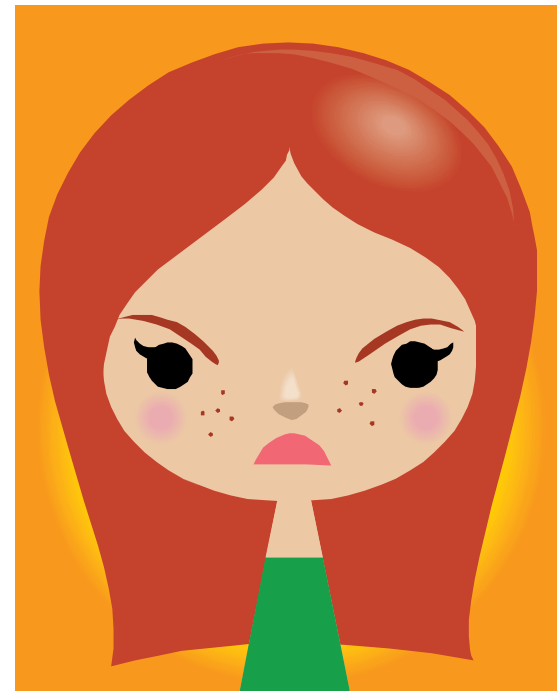
- Educate about philanthropy and “donor choice”
- Foster “relationship” model versus “transactional” model
- Make sure we have sufficiently “prepared the ground” with prospective donors
- Provide “hands on” opportunity for learning
- Maintain communication with each board member

Overcoming Resistance



What does resistance look like?

- They try to debate you
- Neither agree nor disagree
- Have a cranky attitude
- Fail to follow through
- Are “absent”
- Don’t forget body language!



Lessons for Staff



- Could be a recruitment issue
- Don't apologize
- Don't "bend the rules"
- Invite these individuals to move into a different role
- Know when to wave the white flag

Connecting the Dots



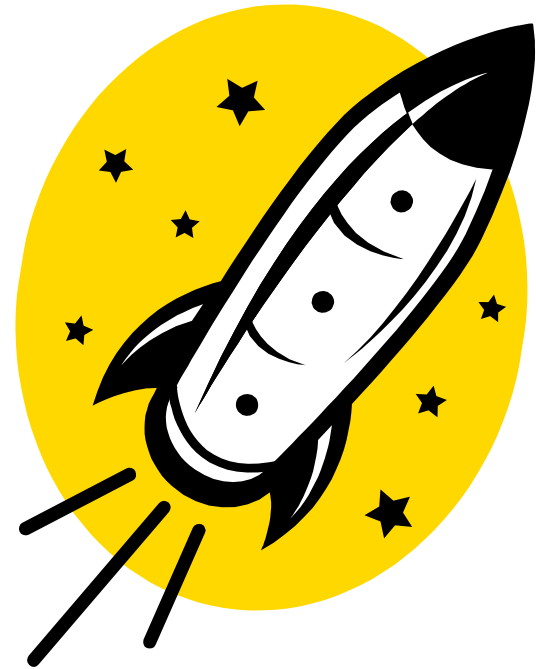
Effective board participation in fund development is a product of effective board development and appropriate support from staff

- Clear vision for the role of the board
- Clearly defined board roles and expectations
- Well-executed processes of recruitment, screening and selection
- Board orientation and on-going training
- Board assessment ... with plans for improvement
- Understanding and acceptance by staff of their role in success

Overall Lessons for Staff



- This isn't rocket-science
- There are no short-cuts
- We are all gardeners
- You are essential to board success





THANK YOU

Your feedback would be appreciated.

pleland@lelandleadership.com