

Training Board Members to be Effective Fundraisers

By Linda Quander, Ph.D.
Closing the Gap, Funding • April/May 2001

Successful organizations not only have good programs, but the necessary financial means to make things happen. Strong, active board members are instrumental in generating the much needed revenue and resources. Carroll Thrift, Director of Fund Development at the Child Welfare League of America in Washington, D.C., said, "It's the old basic operating principle of 'Giving and Gathering.' Board members provide vital leadership and demonstrate their commitment by providing personal financial support and bringing in additional financial resources from the outside."

If your board members need a boost, try these seven tips from expert fundraisers and trainers:

1. Encourage board members to participate in identifying the needs of your organization.

Board members must help to determine the needs of your organization in order to feel ownership of fundraising goals. Barbara Cicone, CFRE, Managing Partner at Cicone & Associates, Inc., in Maryland, said, "Involve board members in developing the case for support, and the rationale for why donors should support the organization's needs. This enables them to explain the case more persuasively to prospective donors."

2. Motivate board members to direct ongoing training sessions for both new and existing members.

In order to ensure that all board members have the same understanding of their responsibilities and how your organization wants to solicit funds, assist your board in training new members as well as retraining old members. Mario Acosta, President of Strategic Consulting in Washington, D.C., said, "The board should establish a development committee that will be responsible for bringing fundraising experts to board meetings or retreats to help board members devise effective fundraising strategies."

Cicone added, "As a part of training, teach board members about the philanthropic tradition in this country. Over \$190 billion was contributed in 1999 to non-profit organizations. Help board members to understand that asking for and giving money are natural processes, and need not be viewed as something to be avoided."

Thrift suggested that training sessions include some of the following topics:

- ◆ Organizational Mission, Vision and Values
- ◆ Organizational Services
- ◆ Financial and Strategic Goals
- ◆ The Need
 - ◆ How to Sell the Need
 - ◆ How to Communicate with Prospective Funders
 - ◆ Sources of Charitable Contributions
 - ◆ Solicitation Strategies



- ◆ The Role and Responsibilities of Board Members, Staff and Volunteers; and
- ◆ How to Launch the Fundraising Plan with Dates and Timelines

In addition, training materials can include publications such as *Shaking the Money Tree: Sowing the Seeds for Successful Fund-Raising* and *The Board Member's Fund-Raising Essentials Kit* by the National Center for Nonprofit Boards.

3. Assign successful fundraisers to mentor other board members who find difficulty approaching funders.

Experts agree that peer-coaching and peer-training strategies are important in developing solicitation skills. Mildred Freeman, Director of Health Education and Sponsored Programs at the National Association for Equal Opportunity in Higher Education in Washington, D.C., said, "Fundraising takes a special talent... Sometimes you need to have a successful, extroverted board member partner with others (board members) in order to provide personality, networking opportunities and creativity."

4. Help your board members to build partnerships with local allies.

Some experts believe that "charity begins at home." Stephen Fallon, Ph.D., Chief Executive Officer of Skills 4 Life, Inc. in Fort Lauderdale, Florida, said, "Some of the best fundraising potential exists in your own community. Often, your agencies are afraid to approach your own businesses or foundations. You feel awkward 'pestering' the folks in your own neighborhoods. Yet, these are the very sources who are close to your target population, and most likely to put their faith in you."

5. Be certain that your board members customize their fundraising strategies.

Acosta emphasizes his personal connection in cultivating current and potential funders in order to develop a relationship based on personal trust and results. In addition, Fallon suggests that board members ask possible funders to give to a specific program at your agency. He said, "Give your program a name. Ask them to invest in your 'Real Facts for Families' program, or your 'Anonymous Answers' campaign."

6. Establish a collaborative relationship between board members and development staff.

Experts agree that board members need the support of your organization's staff in order to meet

continued>>>>



Training Board Members to be Effective Fundraisers

By Linda Quander, Ph.D.
Closing the Gap, Funding • April/May 2001

fundraising challenges. Ciconte added, “Be certain that board members have the tools and resources they need ...” This includes information about the organization’s mission, programs and services; information on current or prospective donors to contact; information about how to make a gift; and pledge cards and envelopes. Staff should be available and provide support.”

7. Stress the importance of the Board’s involvement in development activities.

It is necessary for board members to be involved in both generating and allocating funds. Fallon said, “You’ll wear two hats in your fundraising. Your activist’s hat will identify you as someone who has a sincere interest in your community. Your professional hat will identify you as someone who knows how to manage any money that you secure.” ❖

For additional information, check out these useful web sites:

Alliance for Nonprofit Management
<http://www.allianceonline.org>

American Society for Association Executives
<http://www.asaenet.org>

CompassPoint Nonprofit Services
<http://www.compasspoint.org>

Council on Foundations
<http://www.cof.org>

Internet Nonprofit Center
<http://nonprofits.org>

National Society of Fund-Raising Executives
<http://www.nsfre.org>

Support Center for Nonprofit Management in New York
<http://www.supportctr.org>

