

# Energizing Your Board for Fund Raising Success

*John Elbare, MBA, CFP*  
*Florida Philanthropic Advisors, LLC*

# Our Premise

The degree to which your Board of Directors is actively involved in the fund raising process will be a major factor in your success.

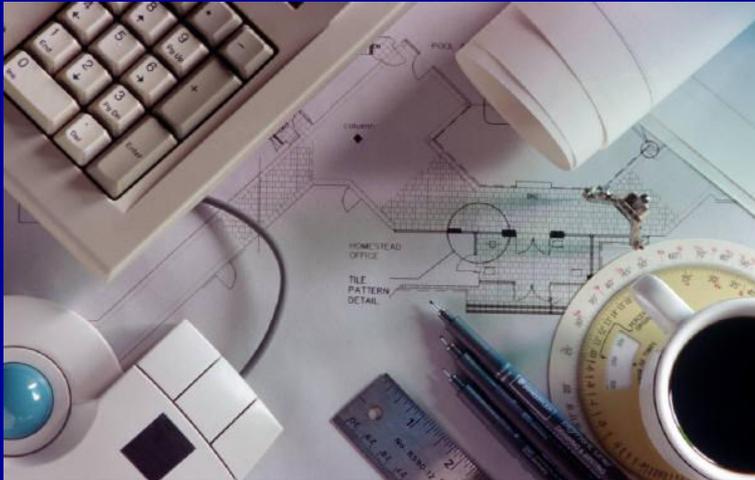
One of the best ways to boost your fund raising program is to energize your board.



# Why is the Board Important?

- ❖ The Board of Directors must take the lead.
- ❖ Prospective donors will ask about board giving.
- ❖ Successful fund raising efforts invariably have boards that give and help out.
- ❖ How can board members expect other people to support their agency, if they will not support it themselves?

# Investment in Fund Raising



Without adequate investment, a promising fund raising program is doomed to failure.

It is the Board's responsibility to secure adequate resources.

# Fund Raising Business Plan

A good plan helps your board understand and support the fund raising program.



# Balanced Program

An effective fund raising program has:

- ❖ Continuous donor acquisition
- ❖ Donor renewal and upgrading
- ❖ Donor recognition and stewardship
- ❖ Personal cultivation and solicitation
- ❖ Focus on major gifts & planned gifts

# A Culture of Philanthropy

First Step: Persuade the Board to accept the premise that every Member should personally contribute to the organization as a donor.

Why? The first question many potential donors will ask: “How many of your board members donate to the organization?”

Any answer other than 100% is the wrong answer.

# If Not You, Then Who?

A lack of full board giving handicaps the organization.

Food for thought: If a board member will not donate to his or her own cause, who will? Why can a board expect others to support a cause that or she fails to support?



# Persuade Them? How?



Begin with a core group, generally the leadership, to initiate the effort to improve board giving. Approach this core group in one-on-one meetings. Recruit a “champion” as early as possible.

# Grow the Idea

Once the leadership is committed, provide training sessions to the full board of directors. The theme of this training: “It is important for each of us board members to be donors.”

The message must be presented to the board formally and endorsed by the leadership. Often a outside expert is the best agent to deliver this message.

# Over the First Hurdle



You have now crossed a major hurdle. The idea of 100% board giving is out in the open. Some will disagree, but the idea is now inside the board, endorsed by the leadership. You are not at consensus yet, but at least the momentum has now shifted toward board giving.

# Make it Policy!

## Next Step: An Annual Board Campaign

Operationalize it. Put a plan in place for the Board to solicit itself. This should be a board project, with board leadership. One strategy that works well is an annual board campaign held in January each year.



# An Annual Board Campaign

Purpose: To achieve 100% board giving

- ❖ Start in January, wrap it up as early in the year as possible
- ❖ Provide a wide menu of giving options
- ❖ Patiently but persistently follow-up

Expected result: Some board members will drop off. The others will become donors.

Report on the results. Provide recognition.

Set a standard of “significant giving” for board members. This is in between “sacrificial giving” and “token giving.”

# Recruitment



Make sure the expectation of personal giving is clearly stated when new board members are being recruited. It is much easier to deal with the issue before they become board members. This screens out board members who have no intention of supporting the organization.

# Orientation

Prospective new board members should be given written job descriptions before they join the board

Provide a solid orientation to all new board members.

Your goal: Get your new board members started off right. Clarify their responsibilities. Help them see the big picture.



# Tips for Encouraging Board Members to Become Donors

- Set the pace with gifts from the Leadership
- Build on the Annual Board Campaign
- Offer each member a menu of gift options
- Cultivate each board member as a major gift prospect
- Count planned gifts toward board giving, at first
- Do not set minimum giving levels for board members
- Pull, don't push!

# Sample Menu for Annual Board Campaign

- ❖ Current cash gifts (check, credit card, EFT)
- ❖ Event Sponsorship
- ❖ Major Gift
- ❖ Planned Gift
  - ❖ Bequest, beneficiary designation, gifts of securities
  - ❖ Gift annuities, charitable trusts, pooled income funds
- ❖ Donor Recognition Club (next board giving goal!)
  - ❖ Lifetime
  - ❖ Annual

# Cultivate Each Board Member

- Consider each Board Member a major gift prospect
- Use the board leadership to help with solicitations
- Get members involved in the organization
- Discover their personal reasons for being involved
- Build on each opportunity
- Let them take “baby-steps” if necessary
- Build positive reinforcement into the process
- Avoid pressure or intimidation
- Apply patience and persistence

# Participating in Fund Raising

Some board members will have a natural aversion to helping with the fund raising

This is often because they view fund raising as “begging”

To overcome this reluctance, it is important to:

1. Familiarize the Board with the Case for Support
2. Make fund raising a major item on each agenda
3. Show them how they are asking for *investments*
4. Let them start on a modest level
5. Provide them with training in gift solicitation

# Ways Board Members Can Help

- ❖ Suggest prospects
- ❖ Seek event sponsors
- ❖ Make Thank You calls
- ❖ Write Thank You notes
- ❖ Participate in prospect review meetings
- ❖ Serve on an event planning committee
- ❖ Host small receptions in their homes
- ❖ Invite prospects to lunch
- ❖ Sell event tickets
- ❖ Attend events
- ❖ Make a planned gift
- ❖ Secure gifts-in-kind through business contacts
- ❖ Volunteer in the program from time to time
- ❖ Speak to civic groups on behalf of the organization

# Key Points to Remember

- ❖ Analyze why your organization is having a problem with board giving or board fund raising
- ❖ It is essential to have a goal of 100% board giving
- ❖ Develop a “Culture of Philanthropy” within the Board
- ❖ Treat each board member as a major gift prospect
- ❖ Make it easy for every board member to make a gift
- ❖ Build on “baby-steps” in board giving
- ❖ Offer board members many ways for getting involved in the fund raising program.



[www.pgcoach.com](http://www.pgcoach.com)

Florida Philanthropic Advisors, LLC

2261 Groveland Drive

Lutz, FL 33549

813-949-2979

[JElbare@pgcoach.com](mailto:JElbare@pgcoach.com)