

# 12 Tips for Engaging Your Board Members in Fundraising - With a Smile!



CAGP

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# Tip for Success #1

## Understand the Legal Context of Governance

- 3 basic board responsibilities
  - Compliance
  - Mission focus
  - Financially healthy

## Tip for Success #2

### Develop your own Customized Approach

- What does 'responsible for fundraising mean'?
- No one size fits all

# Three Key Arguments

- Mission critical activities warrant a strategic approach
- Approval of the long-term fundraising plan is a strategic direction
- It's about what our organization needs 'now'

## Know why your Board Members are on your Board

- All reasons are valid
- Mix of influence, affluence and passion differ from board member to board member
- Align their needs with your fundraising needs

## Tip for Success #4

### Work with Board Members One-on-One

- Use it to your organization's advantage
  - We can do it alone as staff but we can do it better with you
  - Bring credibility to our mission
  - Offering the same opportunity to donors that you have had

## Before NOT After

- CF&P Study
  - Formal board structure = better organizations
  - Only 68% have job descriptions
  - Communicate consistently – fundraising and giving
- Pay attention to both governance and engagement roles

## Tip for Success #6

### Recruiting – Get the Board Members you Need

- Include requirements in your plan
- Link fundraising success back to board engagement
- Make sure your voice is heard – somehow
- Inclusion in roles document, job description, commitment letter



## Development Committee as Champion

- To have or to have not?
- Provides focus, leadership and entry to the full board
- Provides go-to support for you
- Leads board giving program
- Should not abrogate full board responsibility!
- Connects you if you do not have direct board access

## Board Giving –aaagh!

- Common objections
- It takes time and money to fulfill your mission – both matter
- Reframe their thinking on personal giving expectations
- Get them to implement the right choice for the organization
- Never again say ‘give, get or get off’ or ‘time, talent and treasure’

## Tip for Success #9

### Successful Fundraising is more than \$ \$'s

- Make sure they 'get' the importance of fundraising from the start
- Mission fulfillment
- Budget and program impact
- How \$\$'s are used
- How goals are set
- Other measurements are equally as important
- Introduce them to your donors

## Tip for Success #10

### Overlay your Internal Fundraising Culture with Philanthropy

- Talk about philanthropy not fundraising
- Pro-actively build a philanthropic culture
- Focus board members on what they can achieve not on their fear
- Watch the jargon

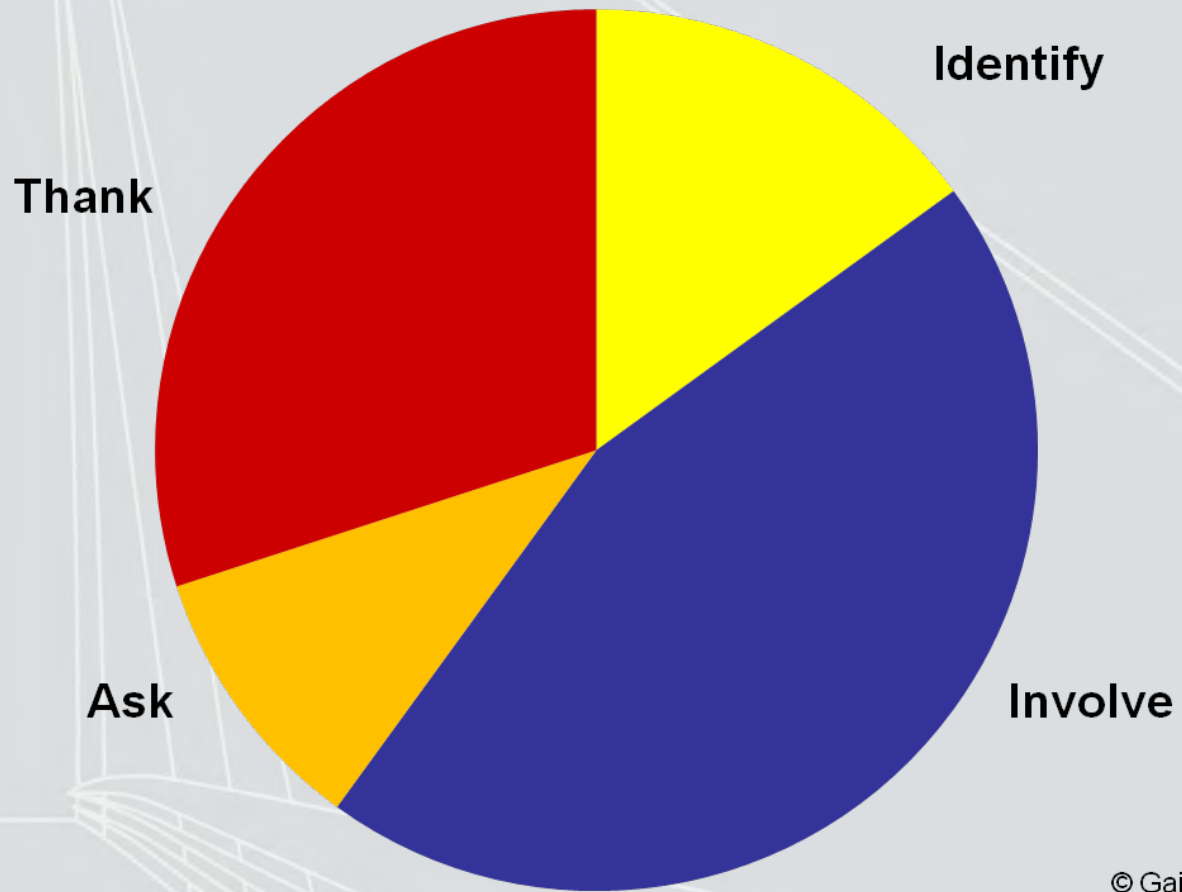
## Tip for Success #11

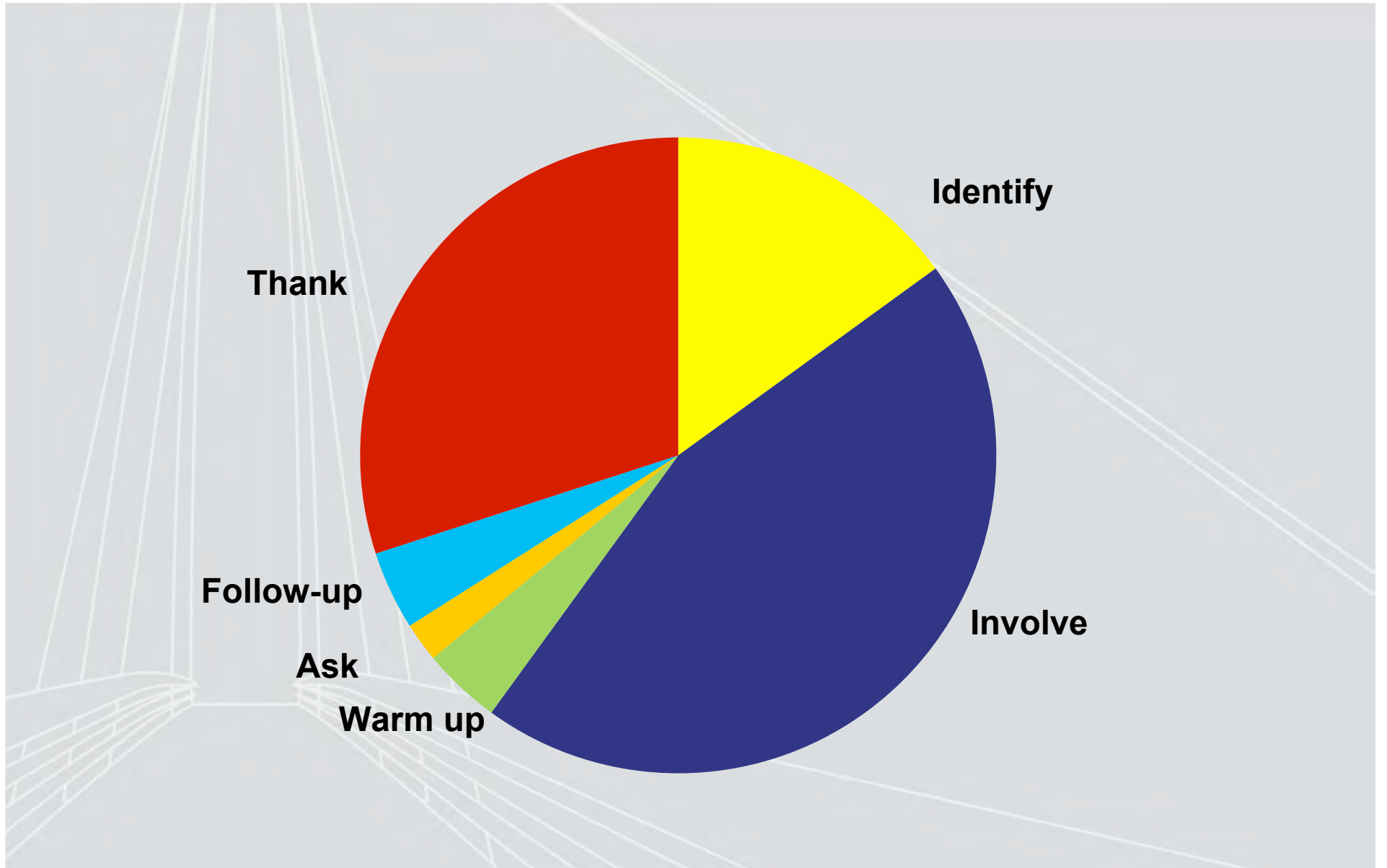
### Make your Board 'feel' why People Give

- Regular celebration of gifts
- Explore the history and reason for specific gifts
- Introduce them regularly to the passion of others
- Insight = understanding = motivation

## Build a Web of Individual Engagement Opportunities

- Focus on the whole fundraising cycle, not just 'the ask'
- Acknowledge and show gratitude for individual skills sets
- There is a role for everyone and each board member needs to be comfortable with their role







## And Lastly.....

- Be gentle
- Be assertive
- Be consistent
- Listen and observe
- Talk 'us', 'we'... not 'I'
- Always, always, always... link to mission



Fundraising can certainly go on in the absence of board engagement, it just won't go as far, soar as high and achieve as incredible impact for your mission!

**Thank You!**

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