

An illustration from a top-down perspective showing several people in business attire (blue and black suits) sitting around a dark blue circular table. They are engaged in various work activities: one person uses a tablet, another a calculator, one works on a laptop, and others handle documents or use a smartphone. Several coffee cups with spiral patterns are also on the table. The central text is overlaid on this scene.

MAKEOVER MY BOARD:

HOW TO LEAD,
INSPIRE OR EVEN FIRE
YOUR BOARD


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AN EXECUTIVE DIRECTOR'S GUIDE TO AN EFFECTIVE BOARD

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“Alone we can do so
little, together we
can do so much”
— Helen Keller

INTRODUCTION

Few things are more critical to your nonprofit’s health, success and sustainability than an effective board of directors. Your board can make or break your nonprofit’s success. Recruiting, building, managing and engaging a leadership team made up solely of volunteers is one of the most ambitious, delicate and daunting responsibilities a CEO or Executive Director will have.

To successfully manage your board you want to do three things:

1. Communicate by telling your board members exactly what is expected of them.
2. Empower them by giving them the tools to lead effectively.
3. Appreciate them and make sure they know they’re making an impact.

WHERE DO YOU START?

The foundation for a great board begins with clear expectations of board service. Face it, you wouldn’t accept a job without knowing what the job description was. Your board needs the same! The best way to set your board members up for success is to provide a robust board contract that details the expectations of service from giving, to volunteering, to attending events.

STEP 1

HOW TO SET EXPECTATIONS

4 ESSENTIAL ELEMENTS OF AN EFFECTIVE BOARD CONTRACT

The best board contracts are as explicit as possible. In it, your organization should lay out the following:

1. INDIVIDUAL GIFTS THE BOARD MEMBER IS EXPECTED TO MAKE.

Detail your annual fundraising events, indicating where participation is mandatory, as well as areas where giving is encouraged, i.e. stretch gifts.

- » *A job description of what is expected of them*
- » *A description of committees and details on committee service expectations*
- » *Your bylaws*
- » *Your annual operation budget*
- » *A program overview*
- » *Current financial statements*
- » *Your most recent audit and annual report*
- » *Board member directory and profiles*

2. FUNDRAISING THE BOARD MEMBER IS EXPECTED TO PERFORM ON BEHALF OF THE ORGANIZATION.

List all the ways a board member can be involved supporting fundraising. Detail here is key. Allow board members to sign up for specific roles: making phone calls, conducting visits, bringing guests to events, chairing specific events, making a planned gift, etc. You can also offer specific events or campaigns for which they can volunteer for, i.e. alumni association membership drive, securing in-kind sponsors, etc. This is a great place to include your annual fundraising budget broken down by revenue areas and goals.

3. PROGRAM AND/OR EVENT ATTENDANCE.

Having board members attend programs gives them a front row seat to your mission in action and empowers them to be incredible spokespeople for your cause. Share a calendar of your events for board members to sign up for and have staff members send them a calendar invite to help ensure they come!

4. COMMITTEE PARTICIPATION.

Recruiting board members is one of the most important things you will ever do at your organization. List and describe your committees with an option for them to select and rate their choices.

Could your nonprofit benefit from having a board contract that clearly defines expectations and encourages them to play an active role in reaching your organization's goals? Consider adapting this sample board contract to meet your needs:



Your Organization's Name Here

Board of Directors Contract

The Board of Directors assists with fundraising throughout the year through personal gifts as well as through relationship development with potential donors. In addition, Directors play an important role in extending connections by recruiting donor prospects to programs and events.

Please use the enclosed forms to indicate what actions you will take to give/get funds and participate in events to support our work this year.

A. Individual Gifts

B. Fundraising

C. Program Attendance

D. Committee Participation

E. Director's Signature

Please return completed packet no later than _____

A. INDIVIDUAL GIFTS

I. Here's how I will contribute personally to *the organizations* budgeted financial goals (A-C):

A. MEMBERSHIP (REQUIRED)

Board Policy States: All *board members* will make a personal gift. Three recommended levels of membership giving are \$500, \$1,000, or \$2,500.

\$_____ Total commitment for Membership

B. BEST GALA EVER (REQUIRED)

Board Policy States: Board members will attend Best Gala Ever, either by purchasing a ticket (\$150 minimum ticket level) or through their company's sponsorship.

\$_____ Total commitment for Best Gala Ever

C. STRETCH GIFT (ENCOURAGED)

Board members are encouraged to make a personal "stretch" financial gift in addition to becoming members. A Board member's level of giving is a personal decision based on his or her ability and personal circumstances.

\$_____ Total stretch gift commitment

Total Contribution to FY_____ Budgeted Funds (A + B + C): \$_____

II. Here's how I will contribute personally to other optional fundraising opportunities:

D. SCHOLARSHIP FUND

Contributions will be utilized to support students who cannot afford the full cost of tuition.

\$_____ Total Scholarship Fund contribution

E. ENDOWMENT FUND

Contributions will support the newly created endowment fund and be utilized for long-term organizational support. Note: Please contact us if you are interested in learning more about Gift Planning opportunities such as wills and bequests.

\$_____ Total Endowment Fund contribution

F. BEST GALA EVER ADDITIONAL FUNDING OPPORTUNITIES

a. Wine: please consider providing 2 bottles of wine (estimated cost \$20 each) for a board auction item at the _____ event (cash or in-kind) \$_____

b. Raffle tickets: please consider purchasing raffle tickets at \$10/each or 6 for \$50 \$_____

c. Paddles Up: please consider an additional gift during the live fundraiser (Levels: \$1,000, \$500, \$250, \$100) \$_____

\$_____ Total contribution to Best Gala Ever additional fundraising opportunities

Total Contribution to optional fundraising opportunities (D + E + F): \$_____

Total Contribution for 2018-19 (I + II): \$_____

Payment Options:

___ Please charge my CC \$ _____ each month between ___ and ___ (8 payments).

___ Please invoice me for the full amount on this date: _____

___ Please invoice me in the following increments: \$ _____ on these dates: _____

B. FUNDRAISING

In addition to personal contributions, Directors are asked to assist the staff and Development Committee through solicitation, stewardship and introductions.

2018-19 FUNDRAISING DRIVE	REVENUE GOAL
Board Leadership Drive (Membership and Stretch Gifts, does not include Best Gala Ever revenue)	
Alumni Drive	
Foundation Drive – Unrestricted/Operating	
Corporate Giving Drive – (program sponsorship)	
Best Gala Ever	
Holiday Party	
Gifts to Scholarship Fund	
TOTAL INCOME	

Directors will be asked to contribute to 2018-19 fundraising goals in a variety of ways, but it is our goal to focus on the activities you most enjoy and that fit best with your schedule.

To help the organization meet its fundraising goals, I am most interested in being contacted to help in the following ways (please choose all that apply):

☐ Making phone calls
 ☐ Writing Notes
 ☐ Bringing people to events
☐ Making visits
 ☐ Other: _____

I am particularly interested in assisting the following fundraising needs (please choose all that apply):

☐ Alumni Membership Drive
 ☐ Corporate Sponsorship Drive
☐ Foundation (grants) funding
 ☐ Best Gala Ever tickets or sponsorship sales
☐ Securing donations of food and services
 ☐ Gifts to Scholarship Fund
☐ Other: _____

C. PROGRAM ATTENDANCE

Board members have consistently noted the value of attending programming and events to learn more about our programs and build connections and relationships. Please find a schedule of our programs listed below. Please indicate a minimum of 3 programs and events you would like to attend as a “welcome host” this year.

WILL ATTEND	MONTH	DAY	EVENT	TOPIC	TIME

Calendar notices will be sent to you for all selected program days and events. If you wish that your assistant be copied on these notices, please provide his/her contact information below:

Assistant's Name

Phone Number

E-mail address

D. COMMITTEE PARTICIPATION

It is strongly encouraged that each Director participates in one committee of the Board of Directors to act as a valuable resource. Please indicate what committee you would like to be involved with this year, listing your first and second choices.

- | | | |
|-----------------------------|-----------------|-----------------|
| • BEST GALA EVER | Co-chair: _____ | Co-Chair: _____ |
| • ALUMNI ASSOCIATION | Chair: _____ | Co-Chair: _____ |
| • FINANCE | Chair: _____ | Co-Chair: _____ |
| • FUND DEVELOPMENT | Chair: _____ | Co-Chair: _____ |
| • GOVERNANCE | Chair: _____ | Co-Chair: _____ |
| • PR/MARKETING | Chair: _____ | Co-Chair: _____ |

CHOICE #1 _____

CHOICE #2 _____

E. DIRECTOR'S SIGNATURE

Name _____

Date _____

STEP 2

HOW CAN I CHANGE THE BOARD I HAVE?

Many of you may be reading this and thinking to yourself, “What if we didn’t set clear expectations for board service from the start? Now, what do we do?” Boards have a lifecycle of development. Growing pains are part of life. Boards are constantly growing, evolving and maturing. You can help your board grow and evolve to a healthier more mature stage. This will require leadership buy-in from your board president or board development committee as well as time and patience, but you can get there.

Working with outside fundraising counsel can help you make this transition. Realize that boards require training. You likely have one or multiple board members new to board service. They ‘don’t know what they don’t know’. If you haven’t invested in board training, consider how you can budget for and potentially partner with other organizations and/or funders to invest in your board. An expert board trainer or facilitator can help validate the board development process, offer objectivity, years of experience, provide emotional support, give gentle nudges and take tough stands. Accept that your board’s evolution is a process but with the right leadership and direction you can make a transition to a happy, healthy thriving board.

USING BOARD ASSESSMENTS TO INSPIRE BOARD DEVELOPMENT

There are many tools to help you manage a board effectively that are explored in detail in later chapters, but if you are in the position of trying to transition to a more robust board contract or trying to prune dead weight board members off your board consider a board self-assessment. Inviting the board to take a self-assessment gives them a safe environment to thoughtfully and honestly examine their own service and possible dissatisfactions or shortcomings they might be facing. It can open the door to a board member making a graceful exit, supporting a board leadership transition or adopting new standards of board conduct, such as those outlined in a board contract.

You may have board members who feel frustrated they cannot contribute in the way they are expected to or that they'd like to contribute. They may be feeling as conflicted about their service as you are. They may not feel comfortable directly approaching other board members or staff. A self-assessment gives them a chance to open up about their own service and the board's performance overall.

When considering board transitions realize that the most fundamental rule of any successful board member transition is to allow for a graceful exit. The best transitions are graceful ones. You don't want the departing board member to be bad mouthing the organization in the community. You want the person stepping back from service to feel appreciated and valued. As much as possible, you want them to go on to say positive things about the organization and reflect positively on their experience. Remember, this person is a volunteer.

SAMPLE BOARD ASSESSMENT QUESTIONS

	On a scale of 1 - 5 with 1 being the lowest (strongly disagree) and 5 being the highest (strongly agree), please rate your agreement with the statement.	Rating (1 -5 OR N/A)
1	Members are clear on the board members role and board functions	
2	Members are emotionally connected and motivated by our mission	
3	Members clearly understand the organization's purpose, goals, objectives and ways of functioning	
4	We have a defined profile of desired expertise, mix and diversity of board members.	
5	We work to build a pool of candidates using the profile through the year.	
6	We have clear, specific fundraising expectations for board members.	
7	We invest in professional development for our board of directors.	
8	We regularly review our board contract and bylaws to reflect changing culture, needs and ensure compliance.	
9	The size of our board is workable and is neither too big nor too small.	
10	Our board meetings include time for board business, board education and social interaction.	
11	I am highly satisfied with the structure of the Board in terms of its committees, term limits, nominating and orientation process, and Board-staff communication.	
12	I am highly satisfied with my board role and responsibilities.	
13	I am deeply proud of my own performance, service and contributions I have made as a board member.	
14	I am highly satisfied with the service and contributions of my fellow board members.	
15	I would like to step up and assume a bigger role in board service.	

STEP 3

HOW TO RECRUIT

5 STEPS TO RECRUIT A LIST OF BOARD MEMBERS

KEY QUESTIONS TO ASK BOARD MEMBER PROSPECTS

A few sample questions you might consider asking a prospective board member during the get to know you stage include:

1. Why is our cause important to you? Are their personal or professional goals that you hope to reach through your service?
2. Tell me about your prior board service experiences.
3. How much time can you commit? Are their personal or professional constraints that you anticipate?
4. What expectations do you have of us?
5. Are you willing to make a financial commitment that is a stretch gift?

When we think about having a great board of directors it can be tempting to fantasize about having lots of big-name powerhouses that you expect to write large checks. In reality, these people may have no real connection to your cause. The ABC's of donor prospecting: access, belief and capacity all apply to board recruitment. You need to have **access** to these individuals, they need to **believe** in your cause, and while we typically think of **capacity** as their giving potential, you should extend capacity to also refer to their availability to commit their time and talents to your organization.

Some or all of the qualities you are searching for in a board member include a willingness to engage, personal connection to your cause, network of key contacts, capacity to give, prior board experience, and specialized expertise. How do you make it happen?

STEP ONE: List who you want to serve. Who are the current or up and coming movers and shakers in your community and your sector?

STEP TWO: Determine accessibility. Do you currently have access to them and if not who can make the introduction? Another board member, a donor, a community leader? Do you have mutual connections on LinkedIn that help you get the introduction?

STEP THREE: Do they care about your cause? Nothing trumps passion. Their passion is what will open the doors to their network, inspire them to make stretch gifts and keep them engaged.

STEP FOUR: Can they commit? Next to their passion for your cause the single greatest predictor of your success with a new board member is their clear understanding of the responsibilities of board service. Too often we fail in this regard. Eager to fill a vacant seat or secure a well-known name, we fail to clearly communicate expectations of service, especially fundraising expectations, and we end up with a recipe for failure.

STEP FIVE: Cultivate. Not every board prospect will be ready to commit when you are. Most won't. You've got to cultivate their engagement in your cause so you are next in line and able to move them to your board as soon as their commitment allows.

10 QUESTIONS TO ASK A PROSPECTIVE BOARD MEMBER

Let's say your organization has identified a strong board prospect. You've taken some key next steps to further engage them in your mission and you're ready to discuss board service. Congratulations! The stage you are in right now is a lot like being on a job interview. You know how everyone says, "interview them as much as they are interviewing you". The same is true here. So what kind of questions do you need to ask them?

1. What makes our mission meaningful to you?
2. What are some of your prior board leadership experiences?

3. What skills, connections, resources and expertise do you have to offer and are willing to use on the behalf of the organization?
4. Do you have any worries or concerns about joining the board?
5. Do you have personal aspirations that could be enhanced by board service?
6. How much time a month can you commit to meetings and serving the mission?
7. What motivates you?
8. What were your expectations from the management of the nonprofits where you've served as a board member?
9. Are you willing to make a financial commitment that is a stretch?
10. How important is socially interacting with other members?

5 QUESTIONS PROSPECTIVE BOARD MEMBERS SHOULD BE ASKING YOU

By the same token, you should be prepared for your prospective board member to ask you some critical questions too! They may ask about the board's weaknesses, what your expectations are, and what makes your organization unique. Below are some questions you want to be able to answer about the organization.

1. Who is on the board now and how did they get there?
2. How long are the terms? How many people are required for a quorum?
3. What committees exist? Who is on them? Are they active?
4. What do the financial statements look like? What is the annual operating budget? What are the top revenue streams and the largest expense categories? Is there a deficit? Does the organization have an annual audit and has it consistently been in good standing? Are there any outstanding legal issues going on with the agency?

5. What are the responsibilities of board members? Is the board well staffed with an existing leadership pool of talent to move into new positions on the board?

Celebrate the opportunity and rewards of service. Be genuine when you discuss the support board members receive. Don't be tempted to downplay your expectations to recruit a noncommittal "big name" board member.

TRY BEFORE YOU BUY

What if board service isn't the right fit? Or if you want to try someone out before making the commitment? There are lots of meaningful ways for folks to leverage their engagement, support your organization and bring in more donors without occupying a board seat.

Traditionally organizations have out these individuals in a perpetual parking known as the "advisory board" reserved for big name individuals who don't have the willingness or capacity to serve on the board. Their names appear on the letterhead but other than receiving an annual report there is little interaction. You're better served engaging with these individuals strategically to leverage their skills, experience and networks to benefit the organization.

One such example is a "circle of friends" called a "Leadership Council" where members commit to an annual gift amount and to bring in a certain number of individuals (i.e. 10-25) annually into the organization to experience its events or programs. Another great solution is to invite someone interested in board service to first serve in a committee role, whether a short term ad hoc committee or a standing committee. Both you and your committee member get to try on service and "kick the tires" to make sure it's a good fit for each of you before any board appointment is made.

STEP 4

HOW TO ONBOARD

5 STEPS TO ONBOARD NEW BOARD MEMBERS

Onboarding a new board member starts them off on the right foot with the proper expectations of board service and sets the tone for a great tenure. They can start making an impact sooner and it sets them, and the whole board and agency, up for success.

GIVE THEM A 1:1 ORIENTATION

Ideally, this is done with the board chair and the CEO or ED at the organization's offices and includes a tour, meeting staff, and sitting down to review the board contract.

MATCH THEM WITH A BOARD BUDDY

Not only does this help your new board member get up to speed faster and eliminate them feeling intimidated being the new kid on the block, it also satisfies one of board members' most common reasons for joining a board- socializing and networking with their peers.

PROVIDE THEM WITH A BOARD HANDBOOK

A comprehensive board handbook is a great tool to educate your board about the organization and empower them to serve. Some core components should include:

- » Organizational information (case statement, current newsletter, staff roster, program overview, development plan, bylaws, budget)
- » Board information (board contract, board roster, meeting schedule, current strategic plan, committee overview, chairs and members)
- » Meeting materials (schedule of meetings, agendas and minutes)

HOST A WELCOME RECEPTION

If you have a new slate of board members joining at once this is a great way to introduce the new board members to the rest of the board, staff, donors, clients, and community leaders.

ANNOUNCE IT PUBLICLY

Send a press release announcing your new board members to your local newspaper and business journal and post on LinkedIn and social networks. These are simple free tools to get publicity for your organization and celebrate and welcome your new board member, or board members.

CHARACTERISTICS OF GREAT BOARD MEMBERS

When people think about recruiting great board members most think about big names and big wallets. There's a lot more that goes into a great board member: a personal connection to your cause, the ability to give, prior board experience, a strong network of key contacts, and an area of specialization, knowledge or influence that could help the organization. While you want board members who are well known respected community and business leaders with significant giving capacity, the most important thing by far for your success is that board members have a clear understanding of their responsibilities as board members.

5 TRAITS OF GREAT BOARD MEMBERS

1. **They hold themselves and the organizations accountable.** Board should be constructive partners in achieving the organization's mission.
2. **They are genuinely passionate about the mission.** There is no substitute for passion. Passion trumps everything. Studies show that not only does passion rub off on others and increase their happiness levels, it is also one of the primary traits making leaders successful.
3. **They open doors to new donors and make a personal gift.** If your board members haven't given of themselves why should anyone else give?
4. **They are focused on fulfilling the mission and see the big picture.** It's easy for

organizational attention to drift away from the mission but a strong board maintains a laser focus on fulfilling the mission.

5. **They ask tough questions.** Great board members provide perspective, ask for updates from the field, and offer objective analysis to support and expand your staff's reach and impact. They don't shy away from thoughtful questions such as "Are we spending and raising money according to plan?" They also are open to self-reflective questions about the value the board is contributing to the organization.



STEP 5

HOW TO LEAD VOLUNTEERS

Managing a leadership team of volunteers who are financially responsible for the organization and have the authority to hire and fire you, their CEO, is a complex task.

The most important tools you have are: the board contract, your board chair, board self-assessments, the board members themselves as “peers”, and their own success.

THE DELICATE ART OF “MANAGING UP”

Before renewing a board term it's important to sit down and thoughtfully ask a board member to consider what they have gained from service, what they want to offer and what they need from you. Three questions to ask before renewing include:

1. How have we contributed to your growth?
2. What would you like to contribute if you served another term?
3. How can we support your development as a board member?

10 TIPS TO INSTANTLY IMPROVE BOARD MEETINGS

1. **Start with a fun ice breaker.** One of the main reason people volunteer to serve is networking with other powerful board members and building key relationships with them. Allow time for social interaction and networking. Make your board meetings fun and your board members will look forward to participating. Start each meeting with a fun, short get to know you ice breaker.
2. **Take a 5-minute break to call donors to thank them for their gifts.** Not only will this make your board members feel the joy of fundraising and dramatically increase their

comfort levels with donors, this has an overwhelmingly positive impact on donor retention. Your donors perceive your board to be the highest form of leadership and authority in your organization. At every board meeting take a 5 minute thank-a-thon break and give each board member a handful of names with gift amounts and any donor background information. Include a few sample lines of what to say in the call and sit back and let the magic happen!

3. **Share a client testimony or have staff describe a day on the frontlines.** Hearing a personal story of how your organization made a difference fuels your board member's passion for your cause and gives them their own toolkit of powerful stories from the frontlines to share on fundraising visits.
4. **Have a board member describe the mission and why it's meaningful to them.** This reconnects your board members with why they are serving and fuels everyone in the room.
5. **Create agendas driven by goals and outcomes.** Board members get tired of the same old committee reports, motions and votes. Change it up to be outcome driven.
6. **Make time for strategic conversations.** Discuss an interesting item you might explore at a board retreat. Try tackling one each meeting or every other meeting. Group board members in pairs or teams to tackle problems and reconvene to report findings and share ideas.
7. **Throw out Robert Rules of Order.** Your board is not a parliament. Don't be afraid to have simple voting when you need to and ditch the yawn-inducing, mind-numbing formalities.
8. **Give your board a hands-on experience of your work.** Whether they're doing a science experiment that summer campers might do at camp, serving the homeless a meal, or looking at cells under a microscope in the hospital, bring the front lines of your work.
9. **Invite your board to share an accomplishment they're proud of.** This is a great way to spotlight their engagement with your organization and let them do the talking.

10. **Host a fireside chat with the CEO.** Set aside 10 minutes for the board to interview the CEO about what is on their mind, what they are most excited about or what's keeping them up at night.

RATE YOURSELF: HOW WELL DO YOU SUPPORT BOARD MEMBERS?

Managing a board is not a small task. Building an A team is hard work. Much is expected of board members. Much is demanded of you as their CEO to support them. It's important that you ask yourself how good of a job you did in supporting them.

How would you rate yourself at...

Never Sometimes Often

1. Tapping into their motivational drives
2. Giving them regular feedback
3. Giving rewards and recognition
4. Offering special privileges or incentives
5. Providing training
6. Giving public affirmations
7. Having fun with them
8. Thanking their families
9. Positive gossip (bragging to peers)
10. Being available to them

STEP 6

GETTING YOUR BOARD TO FUNDRAISE

WHY YOUR BOARD IS AFRAID OF FUNDRAISING

Most nonprofit professionals are frustrated by their board's unwillingness to raise money. What's behind their fears?

1. The myth of scarcity. They may feel that asking is "taking something away" from someone.
2. They're afraid it will feel like they're begging or like they are "hitting someone up".
3. They aren't confident making an ask because they have no experience or training in how to do it. They may also lack confidence talking about the organization, its mission or programs.
4. They fear rejection.
5. They feel they are doing something terrible by putting a donor on the spot and in the hot seat.

There is one solution to each of these fears: you. It's our responsibility to set board members up to win. How we invite our board members to be a part of fundraising is everything. Consider your invitation. Asking a stranger to open up their wallet and write a check can sound scary. Spending quality time getting to know a community leader, or entrepreneur, and what they are passionate about sounds like a lot more fun.

The first step in getting board members to fundraising is framing it the right way. When your child was a toddler and you were teaching them to eat you acted like it was delicious. You weren't tricking them. Food is delicious. They just didn't know it yet.

5 WAYS TO HELP THEM OVERCOME THEIR FUNDRAISING FEARS

Remind board members of these five facts:

1. The world is full of generous people who want to give. We need not look any further than the ALS Ice Bucket challenge for proof of this.
2. 95% of fundraising is cultivation. The ask is the shortest part and literally takes minutes. How you ask does not determine the answer, how you cultivated the relationship does.
3. Donating money is a pleasant experience that feels joyous to the giver.
4. They are just sharing their passion and helping make the world a better place.
5. Being asked makes donors feel important.

HOW TO FRAME FUNDRAISING FOR BOARD MEMBERS

1. **Remember they're volunteers.** You're paid to do this work. You're an expert at it. But your board members are busy people with full-time jobs and family obligations. This means they'll never be the expert you are. They're going to need your help and guidance. Moreover, they need you to keep them motivated. Do you know what motivates them?
2. **Set the right expectations.** You wouldn't hire a new person to work for you without explaining what the job entailed and how their performance would be evaluated. Board members need to know exactly what is expected of them with a clear and robust board contract. What do you do if your whole board has the wrong expectations? Can they be saved? Yes. You can introduce the proper expectations. It may involve some board members stepping down and deciding it is not a good fit for

them. It will certainly involve the partnership of your board president and/or board governance chair. It may also benefit from outside fundraising counsel to offer board training.

3. **Consider your invitation.** Too often I see resentment between staff and boards around the board's lack of participation in fundraising. Instead of starting with the need and reason for support, we lead with the activity we want them to do, i.e. sell tables, or name the prospects they know on our list. Frame your invitation to fundraising thoughtfully.
4. **Offer a multitude of different ways to support fundraising.** You likely have some board members who are introverts and others who are extroverts. Different activities will appeal to each of them. Approaching everyone with the same "one size fits all" expectation will frustrate board members and staff.
5. **Remember that fundraising is staff led.** Your board members are not going to wake up tomorrow and start soliciting donors. You must mobilize them, coach them and provide support. I know several organizations with boards excelling at fundraising but they aren't doing it in a vacuum. Staff is investing a lot of heavy lifting to support the board members in their fundraising success.

10 WAYS FOR BOARD MEMBERS TO FUNDRAISE WITHOUT ASKING FOR MONEY

When board members think about fundraising they often equate it with asking their friends to give or writing their initials next to the names of prospects they know. Directly soliciting a peer is just one of many ways boards can support fundraising. Here are 10 ways board members can support fundraising without ever making a face to face ask.

1. **Make their own gift.** Bottom line: EVERY board member should be a current and generous donor to your organization. The amount they give should be significant to them based on their capacity. Wealthier board members can and should give more but everyone should make a gift that is meaningful to them.

2. **Call donors to thank them.** Think this doesn't have an impact? Think again! In one study by Penelope Burk donors receiving a thank you call from a board member within 24 hours of making their gift gave 39% more. Fourteen months later those same donors were giving 42% more than donors who didn't get the call and they had a 70% retention rate. Set your board members up for success! Give them sample thank you sentences, background on the donor, details on their gift and sample discovery questions they can ask to learn more about them.
3. **Name your organization in their will.**
4. **Invite 10 of their key contacts to a private tour of the organization.**
5. **Host an intimate cultivation event in their home.**
6. **Get assigned 2-3 donors to cultivate.** Cultivation is key AND it sets up the next ask. Board members can regularly and personally call the donors to update them on how their gift is making an impact. I recommend assigning no more than 3 donors to each board member. Three is a realistic number for them to handle at a time.
7. **Take on a project to increase community awareness about the organization.** Write letters to the editor, a series of blog posts, a post on their employer's Intranet about the organization, or use social media channels like Twitter, Facebook, LinkedIn, and Instagram to raise awareness.
8. **Share how money makes an impact at the organization.** What a great way for them to teach other board members, the community, donors and prospects about how they can have an impact on the mission!
9. **Collect and share client testimonials.**
10. **Write an article for your newsletter, annual report or blog on why your organization is important to them.**

STEP 7

HOW TO CREATE A GRACEFUL EXIT

Were you ever in a job or in a relationship that wasn't a good fit? We've all been there.

Maybe someone came on your board with great intentions and then suddenly they got busy and dropped off. Maybe you thought you were recruiting a top-notch passionate advocate for your cause and what you got was a controlling, toxic, micromanaging nightmare. Maybe you inherited one or more board members suffering from founder's syndrome. You might feel like the babysitter and they are like the parents of a newborn who won't hand over the baby and leave the house. It's a good thing this guide has you well on your way to establishing and enforcing term limits and helping you audition future board members, right? So, what do you do now about board members who need to be shown the door?

WHO SHOULD INITIATE THE CONVERSATION?

This process needs to be initiated by the right people. Ideally, this is your board chair and or your governance committee or board development chair. It is the board's job to hire and fire the Executive Director, not the other way around. Your board chair is your most important ally in facilitating a board member's transition off the board.

HOW SHOULD I APPROACH THE CONVERSATION?

Start by giving this conversation and this process the grace and dignity it deserves. This is not a drive-by watercooler conversation you casually initiate a few minutes before the board meeting begins. An appointment needs to be made to have a formal conversation. You wouldn't walk into a meeting to let a staff person go without thinking through exactly what you would say and how you might respond.

WHAT SHOULD I SAY?

First, thank them for meeting you and express your sincere gratitude for their service and dedication to the mission. Be ready to acknowledge your failure to properly set expectations. This is not about being right. You do not need to be right. You need to have a healthy, functioning nonprofit board. The mission is more important than any one person. Ultimately, what matters is creating a happy ending and satisfying resolution for the health of the organization. Not whose fault it is.

Be respectful and gracious. Honor their commitment to the mission. Stop thinking about them as your boss and think about them as a fellow human being. Show special sensitivity to any health, personal or professional issues. You could ask your board member “Are you temporarily a lot busier than usual? Do you have the time?” This is a positive statement. It implies they won’t always be this busy. Open doors for them to take a judgment free exit. For example: “I wanted to touch base with you. I noticed you haven’t been able to come to meetings. I’m getting the feeling they aren’t working for you.” They will likely respond by telling you how overwhelmed they might be feeling. Your job is to acknowledge and facilitate. Your goal is simple: help your board member realize they are not fulfilling their obligations and offer them a graceful exit. You might respond with an exit prepared, i.e. “It feels like it might be best for you to resign due to professional reasons. We’ve all been there. I get it, it happens!” You might add ways they can stay involved: “You’ll always be part of our family. We’d still like to stay in touch. Would it be ok if we called you from time to time?”

You can offer them a leave of absence or other alternative options. We can take a leave of absence in our professional life for an important life transition, why not in our volunteer lives? If they still want to volunteer you can offer them a less time-consuming option, such as serving on an ad hoc committee, consulting or even mentoring.

Be prepared for the board member who commits to improving. If they commit to improving what does it look like? What limits are you prepared to set?

If they resign, thank them for their service. At minimum, this should be a personal thank you letter written by the board chair and one from the Executive Director. Let them know you will inform the board that they are resigning due to personal and professional commitments. Other board members may also send a personal note of thanks for their service.

ABOUT RACHEL MUIR, CFRE



Rachel Muir is a recovering Executive Director who has worked every side of the Rubik's cube that is the nonprofit sector.

When she was just 26 years old, Rachel Muir founded Girlstart, a non-profit organization dedicated to empowering girls in math, science, engineering, and technology. She started Girlstart in the living room of her apartment with \$500 and a credit card. Several years later she had raised over 10 million dollars and was featured on Oprah, CNN, and the Today show.

A winner of Oprah Winfrey's Use Your Life Award, Rachel is a three-time finalist for Ernst & Young's Entrepreneur of the Year Award, was named "Outstanding Fundraising Executive of the Year" by the Association of Fundraising Professionals, and one of Fast Company Magazine's "Fast 50" Champions of Innovation. Rachel has been featured in CosmoGIRL!, Texas Monthly, Glamour, and Fundraising Success Magazine. Her career includes leading an online fundraising consulting practice for a major software company and managing major gift portfolios for some of the country's largest and most successful nonprofits.

Today she leads custom training and board retreats that reliably turn participants into confident, successful fundraisers. Rachel has served on numerous boards and has the T-shirts – and scars -- to prove it.

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