



Nonprofit News

BOARD FUNDRAISING: SETTING THE STAGE FOR SUCCESS

BY JUDY LEVINE

Give, get or get off! Those famous five words...But while we've all heard them, how, exactly, do we get our boards to live them?

How can we hold board members at arms-length when it comes to program development, financial management and human resources - areas where boards are supposed to set policy but let staff manage implementation - and yet ask them to step up and actually do the work of fundraising?

The answer is: thoughtfully, with plenty of encouragement, in partnership with staff, and only once the board is convinced of the absolute necessity of shouldering that responsibility.

Often, our agencies have lumbered along for years with minimal board fundraising. Then, all of a sudden (or so it seems to board members), they're being asked to do more-and in an activity (asking for money) that's not for the faint of heart. You can't blame board members in this situation for secretly feeling this is some "best practices" plot and that if they just keep doing what they've always done, the agency will keep performing as well as it always has-without their fundraising effort.

So, the first job in building board fundraising engagement is to make the case for change. Not the case for why the agency is deserving of support, but why a board stance of passively supporting staff fundraising simply isn't good enough anymore.

This could mean citing a trend analysis of decreasing government support, or a changing corporate climate, or even a new venture that needs to be internally funded to start - capital campaigns are

famous for waking slumbering boards to the need to amend their ways. Whatever it is, someone on your board (or, better yet, a few members) must be convinced of the absolute necessity of raising the board's profile in this arena.

Interestingly enough, that someone doesn't have to be your board Chair. It's great if it is, but realistically, if your board has been asleep at the wheel for a long time it's unlikely that the person presiding over that trance is going to be the one leading your board out of it. Many times, new board members with fresh energy can be enlisted to lead the charge, and it's even better if you can pair that person with a long-serving board member to give the effort some clout.

Now, the fun begins.

While some board members understand the mechanics of fundraising (because they work at nonprofits or have served on high-performing boards); others may have an extraordinarily naïve concept of how fundraising works. The very idea of donor cultivation is foreign: "Donald Trump has lots of money, let's ask him for a \$1 million grant". The relationship of fundraising costs to net proceeds is oblique: "Let's rent the Rockefeller Center Ice Skating Rink and have a \$10 per-person, skating party". The rationale for sponsor motivation is vague: "Let's get Bruce Springsteen to give a concert. He sings about working people and we do workforce development."

Yet you don't want to squash board members' newfound enthusiasm.

The answer is a board fundraising plan - a

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Spring
2011

936 Easton Rd.
PO Box 754
Warrington, PA
18976
&
163 S. Broad St.
Lansdale, PA 19446
215-343-2727
www.bucksnonprofit.com

Tell Your Stories With Video...Without Breaking Your Budget

Vince Caperelli, Jr., runs Cotton Field Communications, a video production company located in Central Bucks County. He has shot video as locally as his own street and as far away as Guatemala City, Guatemala.

To learn more, visit www.cottonfieldonline.com or contact Vince at vcap@cottonfieldonline.com

For most people familiar with the work of non-profit organizations, it is understood that there are plenty of great stories available to be communicated. Means of communication, however, often don't fit within typically tight budgets. But even in that context, ways of communicating stories have evolved over the years.

Today's most compelling storytelling medium is video. Organizations integrating video into their communications strategy typically take one of two different approaches. The first approach is to succumb to preconceptions that professional video is too expensive so they use a FlipCam and the software included on a PC to just set something to music unintentionally used in violation of its copyright. The second approach is to recognize the value of professional services so they hire a video production company to produce one good story (ideally each year), somehow finding funding to support their decision.

But there is a third option—In-House Video Production.

Since 1978, Fort Washington-based Access Services has been helping people with special needs, and those who care for them, in 11 counties throughout eastern Pennsylvania. Like many non-profits, the folks at Access have seen their storytelling communication evolve over the past 30 years, perhaps culminating in early 2010 with the production of their first professional video. They yearned for more but knew it was cost prohibitive.

Thinking outside the box, the folks at Access—knowing they both wanted and needed video—decided to explore in-house video production. They pursued a capacity building grant, which they were later awarded, and ended up working with me—a professional video producer—to identify quality, affordable equipment, which they then purchased. They selected 5 employees to form an in-house video team, and I spent nearly 40 hours training them to produce both internal and external short, non-fiction videos.

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Spring 2011 Nonprofit Management Trainings

May 10, 2011 **Picture This: A Roadmap to Financial Health Using Key Performance Indicators and Dashboards**

12:45-4:00 pm

Cindy Bergvall, CPA—Bee, Bergvall & Co.; BC Center for Nonprofit Management

Financial health can be tied to many factors and involves not just figures from the financial statement but also service data. It can be difficult for organizations to identify which key factors are the best indicators of performance. This session will assist you in identifying three-five key performance indicators that will best assist you in evaluating your organization's financial health.

June 7, 2011 **Inspiration, Cultivation, Transformation!**

12:45-4:00 pm

Nancy Montvydas, CFRE—Senior Director of Development, Soroptimist International of the Americas

A key responsibility of any board is fundraising. If you aspire to have a highly-productive board engaged in fundraising, this workshop will help you inspire your board to cultivate donors and increase contributions to transform the future of your organization.

July 12, 2011 **Maximizing QuickBooks in your Organization**

8:45-12:00 pm

Terry Michael, Bookminders

Nonprofit accounting is complicated and QuickBooks is a great tool to assist you in streamlining your financial system. Maximize QuickBooks in your organization by learning the features of the QuickBooks reporting system and expand this financial program into a powerful management information system.

Seminars are \$35 pp
Board members attend free

All seminars are held at the PA Center for Biotechnology of Bucks County, 3805 Old Easton Rd. Doylestown, PA

For More information please contact Liz Vibber 215-343-2727

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coordinated sequence of activities that board members engage in over time (preferably coinciding with your fiscal year) which encompasses donor identification, cultivation, multiple solicitation methods matched to varied gift sizes, and donor recognition. You may need to include some board training as part of this plan. That saves you, the chief executive, from serving in the position of chief staff naysayer.

A good consultant will be able to harness your board's energy to practical activities while also addressing their unstated fears (we all have them). If you have professional development staff, they may be able to support board members in this role. But, as we all know, "a prophet is without honor in his own country." Board members, who don't really want to do what you are asking, will be less likely to discount the advice of an "outside expert." At Cause Effective, we've had decades of experience cajoling reluctant board members into fundraising readiness, and we've got a few tricks up our sleeves. So will any other reputable consultant dealing with board fundraising engagement.

The key to this process is your board's fundraising committee. This is the inner circle of board fundraising - the group of folks who are responsible for steering your board along this path. They won't be the only ones doing fundraising, but they are the ones responsible for monitoring and inspiring the rest of the board to pitch in. The chair of this committee is the most important person in getting your board to actively fundraise. So, choose someone with energy to spare, who's well-respected by other board members - and fearless.

Board members can clue in to the fundraising process at many levels. Involving board members in donor cultivation can be a great way to refresh their own knowledge of your agency. For example, ask board members to host a dinner for friends after attending a workforce training graduation. They can combine social and organizational purposes, bringing in donor prospects (i.e. friends) to experience your program at its best (when it "sells itself"). That feels like friendraising, not fundraising - but the secret of fundraising is that it is, indeed, friendraising at heart.

Your plan will need to include some opportunities for board practice - practice in both asking for the gift and talking about the agency, explaining its vision, its impact, and its needs. One of the frequently unstated reasons board members aren't out there aggressively friendraising is because, quite literally, they don't know what to say. It can be very helpful to create talking points for them. While board members may be experts in management and governance, they often feel remarkably, and uncomfortably, like neophytes when it comes to programs. Usually, they are quite grateful for tools to ease the learning curve.

If you fill your board fundraising plan with simple, do-able activities, provide plenty of opportunities for board members to practice the fundamental steps of fundraising year-round (i.e. not just at one big shindig per year), and offer lots of group support (how about scheduling a repeating board meeting agenda item recognizing board member fundraising efforts?), you should find some - probably not all, but over time, a majority - of your board members will start to find their fundraising home ground.

That doesn't mean that everyone will be capable of making \$10,000 asks; but it does mean that everyone should be able to find a level appropriate to their connections and personal disposition. Sure, every group has some long-time fundraising grouches - board members who've served for years without being expected to raise money, and who aren't going to start now. But, over time the bulk of your board will move into compliance and start to self-monitor its performance in this area.

A word about staff support: Many chief executives have the unrealistic fantasy that once their boards start to fundraise, they'll do it on their own and just report back their "winnings". Sorry, it doesn't happen like that. No matter their good intentions, board members have lives that interfere with their board service. They promise to make a few calls, then get home and find that their kid's failing Spanish class or the dog's arthritis is

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Judy Levine is the Executive Director of Cause Effective.

Cause Effective is based out of New York providing a variety of development and special events consulting and training resources to nonprofits.

www.causeeffective.org

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acting up. They're on loan to your organization, and once they leave your premises, life happens to them.

Yet the very premise of board service is that board members have access far beyond the staff. We need that access. So, how do we help them to help us? By partnering with them.

To get consistent fundraising action from board members, try managing up. Master the skill of nudging, not nagging. Weigh what you ask of them so they're not treated as just another pair of hands. Provide them with the materials (printed matter, talking points, pre-meeting briefings) they need to do the job successfully. And don't forget the best management tool of all - praise for a job well-done (or wholeheartedly attempted).

Fundraising is a tough job, with plenty of opportunity for rejection. The more you can set your board members up for success, the more they'll actually achieve.

You can contact Cause Effective at (212) 643-7093; info@causeeffective.org or visit www.causeeffective.org

Tell Your Stories With Video...continued from page 2

The members of the team are people just like you—they hadn't used the equipment before, hadn't understood the process of video production, and had never thought they'd be involved in such an endeavor. But the process has been incredibly successful. You can view the first video they produced at: www.cottonfieldonline.com/watch. And over time, by producing more videos, they will hone their technical abilities and their storytelling skills, thus raising the quality level of the visual stories they'll tell.

If you have stories you want to tell without breaking your budget, please contact me to discuss it in more detail. I'd love to help you communicate your stories—both frequently and cost-effectively.

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Bucks County Center for
Nonprofit Management
PO Box 754
Warrington, PA 18976

