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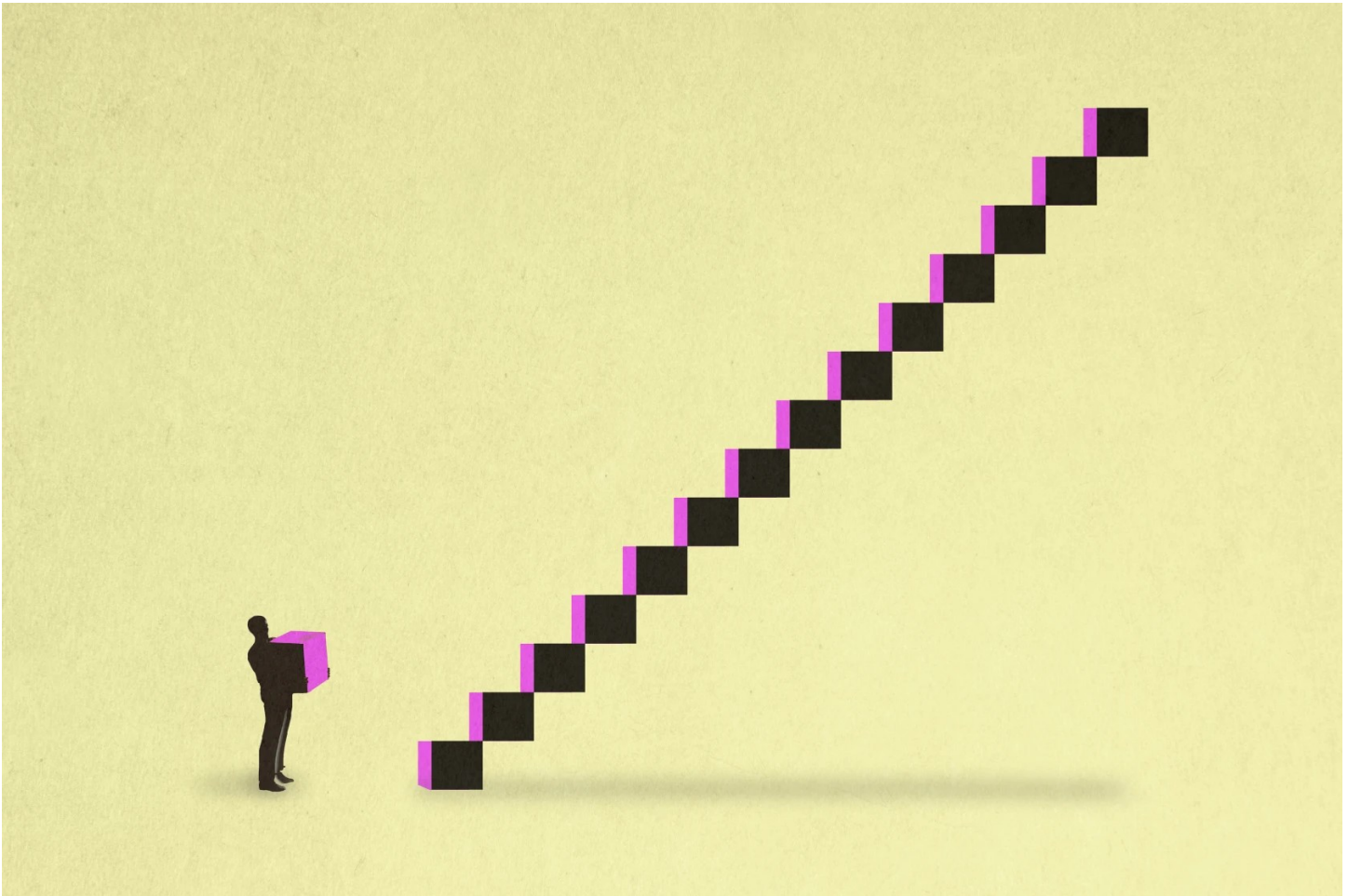


LEADING

# How to Create a Culture of Fundraising on Your Board

By [Lisa Schohl](#)

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Most board members understand that their role includes helping bring in money for a nonprofit, but they don't always know how best to go about it or feel comfortable asking others for donations. This means

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them get started, hold them accountable, and foster a board culture that prioritizes this work.

You shouldn't assume that trustees understand what fundraising is and know how to do it, simply because they joined your board, says Christal Cherry, CEO of The Board Pro, a consulting firm focused on nonprofit clients. "These are just social do-gooders, not expert fundraisers," she says. "The onus is on the organization to help prepare the board with the tools they need, with the skill sets that they need, to actually raise money."

This is a process that takes time, says Wanda Scott, a fundraising consultant, especially if you're trying to introduce a fundraising requirement for the first time. If you have organizational and fundraising leaders who are prioritizing this culture-shift, it could take about two to three years to fully take root, she says.

To guide you in these efforts, the *Chronicle* gathered advice from three experts who have served as board members and have years of experience helping charities build strong fundraising boards. Here are nine of their top tips.

### **Take the fear out of fundraising.**

Many trustees have fears related to fundraising, Cherry says, but that's often because they don't fully understand what is involved. The best way to educate board members about what fundraising is — and what it isn't — is to show them what it looks like in real life, Cherry says, ideally by having them join a fundraiser on donor visits. That way, they'll see that 90 percent of these conversations are focused on getting to know the donor and building trust, she says. "And then every once in a while, you might want to slip in a little something about the organization."

If your nonprofit can't include board members in live donor meetings, you could instead show them videos, Cherry suggests.

You should also show trustees that fundraising can be fun and joyful, she says. Many are scared to ask for money because they feel like they're trespassing or imposing on people, she says. So, it can be helpful to remind them that most people want to give, and when they don't, it's often because a nonprofit didn't ask.

Another big fear around fundraising is the possibility of getting a "no," Cherry says. Trustees should understand that this could happen no matter how well they make an ask, she says — maybe because it isn't a good time for the donor or "maybe the answer is just 'no,' and that's OK."

And explain that "no" doesn't necessarily mean "no forever," Cherry adds. Suggest board members thank donors for considering their request and then ask if they could revisit it in six months or after the situation that is preventing them from giving ends, she says.

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Think about what your board is currently missing, such as ties to wealthy individuals or certain skills or talents, and try to fill those gaps when seeking new members, suggests Angela Johnson, chief operating officer at Give Black Alliance, a nonprofit that works to strengthen philanthropy in Black communities. Don't just focus on wealth, Johnson adds, because even if someone is wealthy, they may not have helpful connections or want to make introductions, or they may not have an interest or skills in fundraising.

There are typically three fundraising roles a nonprofit board needs in order to do well, Cherry says: ambassadors, connectors, and askers. Some trustees might be good at all three and others might do only one or two, she says, and that's fine — just try to get a good mix. To figure out how incoming trustees are likely to contribute and make the most of their talents, CEOs and board chairs should talk with each one about their strengths and how they prefer to engage.

### **Set clear expectations during recruitment and onboarding.**

Johnson suggests creating a “board agreement and opportunities” document that clearly lays out your requirements for participation, such as attending 75 percent of meetings, attending the annual fundraising event and bringing a guest, and shadowing a program staffer to learn more about the organization.

This includes setting a fundraising goal. Boards often raise about 10 to 30 percent of a nonprofit's total annual revenue, Johnson says, so you could use that range as a starting point to develop individual goals. It's important to ask for the specific amount you want, or at least a range, she says, just like you would with an individual donor. “Don't ask for 10,000 and hope that they'll give you 100,000.”

### **Be inclusive.**

You could establish a “give or get” policy to accommodate trustees with different giving capacities, Johnson says. For example, you could say all trustees are expected to donate \$5,000 each or raise that sum from their friends or companies.

If you're asking for a minimum annual gift you're not sure everyone can meet, you could allow people to grow toward it, Scott says. Meet with each trustee individually, she suggests, and ask those with tighter budgets to make their “best gift” and try to bring in the rest from their networks — and then help them figure out ways to do that.

A tiered giving structure might make sense for some nonprofits, Cherry says, such as those that serve students or low-income people and want representation from the community on their boards. However, if your organization needs to raise a certain amount from each trustee, your board simply may not be the right fit for someone who can't give at that level.

### **Encourage different ways of contributing.**



treasure, ties, and testimony. Fundraising includes things like getting vendors to donate their time or services, she says, because those are resources you didn't pay for. Other examples of nonmonetary gifts might include providing free legal advice if you have a trustee who is a lawyer, promoting your nonprofit on social media, or encouraging peers to buy tickets to an event.

Johnson also sometimes asks board members to invite her to join their table when they attend sponsored events hosted by other organizations so she can meet potential donors. "You've saved my organization the cost of getting in the room or you've gotten me into a room that I would not have gotten into otherwise because I wouldn't have been invited," she says.

Make sure to consider the value of such nonmonetary donations when assessing each trustee's annual contribution, Johnson adds.

### **Foster accountability.**

Board leaders should talk about fundraising and report on progress toward the goal at every meeting, Scott says. "If not, people will either forget that there's a board contribution or they won't feel like it's a priority because it's not mentioned."

If your board has an annual letter of agreement about expectations for participation, the development committee chair should track those pledges throughout the year and check in with members who aren't meeting their obligations, Cherry says. That may mean asking the trustee if they need to update their letter or if now's still a good time for them to serve.

But don't only reach out to those who fall behind, Cherry says. It's nice to thank and congratulate members who are fulfilling their commitments, too.

### **Recognize and celebrate contributions.**

Be sure to recognize and celebrate successes regularly, Scott says, such as an increase in board giving over the previous year or trustees who exceed their fundraising goal. If certain members don't want to be recognized individually, you could still celebrate the board's overall progress, she says. For example, Scott recalls an organization that threw a party for its board when they reached 100 percent of their goal for the first time in many years.

Applaud in-kind contributions, too, Johnson says, such as a trustee helping secure a big sponsor for an event. "Your board members are just as important as donors," she says. "You cultivate them in the same way."

### **Communicate consistently about opportunities to engage.**

Email your board each week to let them know what's happening at your organization and provide a menu of



helping paint the hallways. Be really specific about the opportunity, she says, including the time commitment needed, so everyone will know what they're getting into before signing up.

### **Provide tools and training to help trustees deliver.**

Hold a fundraising workshop for your board at the start of every fiscal year, Scott says, so they can consistently develop their skills and confidence. Teach members specific tactics and give them time to test and practice different approaches with each other, she says.

Address logistical questions, too, such as how many times they should email people in their network. "These are real, valid questions when people are new to fundraising," Scott says.

Cherry suggests creating a fundraising "toolbox" for trustees with your nonprofit's case for support, mission statement, annual report, as well as the fundraising goal so they'll know why they are raising money. Also provide things they can share online to help spread the word about your work, she says, like compelling stories and videos.

Build a "fundraising moment" into every board meeting, Johnson says, to let members practice techniques or work on their skills. A good use of this time is to help trustees create personalized, 90-second elevator pitches about the organization, she says. Here's an approach Johnson has used, taking about 45 minutes during a meeting:

1. Share some impact information, including the mission and vision, stats on successes, and stories from people who have been helped.
2. Ask each trustee to write a few sentences about why they joined the organization or why they care about the cause.
3. Have them share their stories in pairs and give each other feedback on what they would like to hear more or less of and how to weave in the nonprofit.

After these exercises, you could encourage everyone to post their statements on social media or try them out in conversations and then share the reactions with the group to continue learning, she suggests.

As Scott says, you need to give board members tools and learning opportunities on a regular basis if you want them to play an active role in raising money. "People already have the 'why,' right?" she says. "That's why they joined the organization. But they want to know, in terms of fundraising, 'how do I do this?'"

*We welcome your thoughts and questions about this article. Please [email the editors](#) or [submit a letter](#) for publication.*



## Lisa Schohl

Lisa Schohl writes and edits advice articles and reports for the *Chronicle of Philanthropy*. Previously, she oversaw the organization's webinar series for fundraisers and nonprofit leaders. Before joining the *Chronicle*, Lisa worked as a nonprofit communications professional, journalist, and Spanish-English translator and editor.

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