



## BOARDS ON FIRE: INSPIRING LEADERS TO RAISE MONEY JOYFULLY

By Susan Howlett<sup>1</sup>

We have all been disappointed by our board members at some point. We wish they would participate more fully, be more compelling ambassadors, raise money more enthusiastically, and take more initiative as governors or committee chairs.

I believe that our board members really want to lead well, but our organizations may be unwittingly putting barriers in their way. One such barrier is not being clear about what we want from them. Here's an excerpt from my book *Boards on Fire: Inspiring Leaders to Raise Money Joyfully*, which asks whether we are being crystal clear about expectations in the first place.

### Expectations Are Unclear

When I ask board members during solicitation trainings why they're not happy about asking for money, they say they weren't told that it was an expectation when they were recruited for the board. No one said that they were expected to give, and no one said they were expected to ask, whether it be for volunteer time, gifts in-kind or money. In fact, any discussion of expectations (about attendance, leadership, or being an advocate for the cause) was minimized just to get them to say yes.

It's no wonder many board members feel like victims of bait and switch when they discover that not only is fundraising an expectation, but they're constantly being asked to make their own contributions (to the annual campaign, the work place campaign, the event, or the major gifts effort). Some say fundraising is all they're being asked to do all the time.

### Overcoming Expectation Barriers *Clarify Commitments at Recruitment*

Obviously, organizations need to let people know during recruitment, that all board members are expected to make their own financial contributions, and all board members are expected to participate in fundraising. We need to show them very clear job descriptions, go over each item on the description, and

make sure they understand implications of each before inviting them to join the board. I suggest having three documents at hand:

1. One that describes the role of the board as a whole.
2. One that describes the expectations of anyone who serves on the board.
3. One that is customized for each particular board member.

For the first document I use the standard "Roles and Responsibilities of the Board" from BoardSource.<sup>2</sup> One of the items on the list is to "ensure adequate resources," which means that no one escapes responsibility for the fiscal health of the organization. Another item on the BoardSource list includes the phrase, "Enhance the organization's public standing, clearly articulating the mission, accomplishments and goals to the public and garnering support from the community." That's what the *board as a whole* is responsible for in terms of fundraising.

For the second document, I offer a list of expectations that apply to *every single board member*, regardless of his or her position in the organization or the community. It says that each member is expected to attend every board meeting and retreat, represent the leadership at each one of our events, serve on a committee, make a personal financial contribution, and participate in fundraising in the way that most suits them.

For the third document, I suggested a *customized* contract that each board member creates with the appropriate committee (nominating, board development, governance committee), and signs, taking one copy and leaving the other for the record of the organization. This one says something like "Because I am Lisa Leader, and I bring unique gifts to this board, I agree to the following commitments this year to fulfill my duties in fund development." (See generic example at the end of this article, and samples from two nonprofits on my website at [www.Susanhowlett.com](http://www.Susanhowlett.com).)

### Clear But Harmful Expectations

Sometimes I see expectations that are clear, but misguided. Some organizations have prescribed gift amounts that each board member is required to contribute each year. I discourage this practice, as I've seen people who would have been great board members decline the nomination because they couldn't afford it, while others, who could have afforded ten times that, give only the required amount because that's the *number* they heard during recruitment.

Another expectation that I discourage is the annual "give-or-get goal," where you have to raise a particular amount if you can't give it yourself. This puts all the emphasis on getting money, at any cost, from any warm body, rather than identifying appropriate prospects and helping deepen their relationship to the mission. The latter engenders long term support, including volunteerism, ambassadorship, or gifts in kind, which may not count towards the "give-or-get goal," but are equally important to the nonprofit.

What usually happens is that the people who are good at fundraising exceed the goal, while those uncomfortable with it simply don't do it — and there's no consequence. This builds resentment among the doers and guilt among the others — neither of which creates a healthy environment for philanthropy. Meanwhile, everyone's more worried about how gifts get credited than they are about the donors' relationships with the mission.

### *Hold Members to Their Commitments...*

If the first way to overcome this barrier is to create clear expectations and share them proudly at recruitment time, the second one is to hold people to their commitments. I would charge the appropriate committee with watching participation all year long. If leaders fall behind with their giving or their activity, a committee member can contact them to see if something has changed (Did they lose their job? Do they hate the committee chair? Have they committed to more than they can follow through on?) and offer whatever support would make their job doable. We usually wait until there's a crisis to check in with people, or until

there's already resentment built up about their lack of follow-through.

Then, at the end of each year, have the board development committee do individual performances reviews with trustees to see how they felt about their original commitments and their performance in relationship to them.

This shouldn't be about fault-finding, but about discovery. And it shouldn't be about just fundraising, but how fundraising fits into the scheme of things for the board as a whole and as individuals. Think of the conversation as a two-way exploration of how the organization's systems foster the board's work and how each board member is responding. The reviews should be conducted in the spirit of board members discerning of how they can add optimal value in ways that suit them, thus helping the organization thrive.

### Commitments that Make Their Hearts Sing

I often make the comparison between finding the right jobs for people and making a loaf of homemade bread. In order to make a loaf of homemade bread, someone has to till some soil, and someone has to plant the seeds. Someone needs to harvest the grain and someone must grind it in flour. Someone needs to mix the dough, shape it into a loaf, then bake it, slice it and serve it. It's not necessary for the person that loves to knead dough to have to drive a tractor, or vice versa. We can assign board members to tasks that make their hearts sing.

### *...But Also, Help Them Meet Those Commitments*

Getting to know each member's motivations can help with joyful commitment. The board development committee might meet one-on-one with board members to plan how they will make their contributions throughout the year to maximum advantage. Perhaps he works for a company where he feels significant pressure to participate in the annual United Way campaign. Why not allow him to look like a model donor at work by making his entire year's pledge to you there? If you have a "Fund a Need" section in your auction, a member may want to be the donor who launches the process with a showy large gift. She may prefer to leverage other support by being an early donor to your major gift campaign or by offering a challenge pledge. Does she usually make her gift at the

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end of the calendar year by transferring stock? Or does she want to contribute early in your fiscal year to create momentum for others? Have these discussions with each board member so it feels like you're meeting their needs as well as the organization's.

One last item about clarity of expectations: I see a lot of board members try to get out of making a

personal contribution by claiming the sponsorships they garnered from their employers as their own. I think it's important for board members to make financial contributions from their *own* resources, in addition to asking their employers to participate. Making one's own gift is a different emotional experience from getting someone else to give. And in groups where a rich culture of philanthropy pervades the organization, every board member has a personal stake in the group's success.

When leaders understand best practices in the nonprofit sector, and when they are clear about what the organization expects of them, they can assume their roles with more gusto. When they get to shape a "contract" that reflects their personal strengths and preferences, they will likely do what they have agreed to

### Roles and Responsibilities of the Board as a Whole\*

1. Determine the organization's mission and purpose, including goals, means, and primary constituents served.
2. Select the chief executive and ensure that the individual has the moral and professional support necessary to further the goals of the organization, and then periodically assess his or her performance.
3. Provide proper financial oversight, including developing an annual budget and ensuring that proper financial controls are in place.
4. Ensure adequate resources.
5. Ensure the legal and ethical integrity and maintain accountability. The board is ultimately responsible for ensuring adherence to legal standards and ethical norms.
6. Ensure effective organizational planning, actively participating in the overall planning process and assisting in implementing and monitoring plans and goals.
7. Recruit and orient new board members, and periodically assess the board's performance.
8. Enhance the organization's public standing, clearly articulating the mission, accomplishments, and goals to the public and garnering support from the community.
9. Determine, monitor, and strengthen the organization's programs and services, making sure they are consistent with the mission and monitoring their effectiveness.

\* Source: *Boards on Fire: Inspiring Leaders to Raise Money Joyfully* by Susan Howlett. Adapted from BoardSource, [www.boardsource.org](http://www.boardsource.org).

### Elements of a Generic Board Member Job Description\*

- Embrace the mission of the organization
- Learn — and carry out — the legal responsibilities of the board
- Learn enough about the organization to portray it accurately
- Attend all board meetings, retreats and special events
- Come to board meetings prepared to participate fully
- Play a leadership role in at least one committee or task force
- Make an annual personal financial gift according to your means
- Help with fundraising efforts in whatever way is most appropriate
- Serve as an ambassador between the organization and the community
- Communicate clearly and respectfully, and support the decisions of the full board
- Keep the administrator informed about concerns in the community
- Exercise loyalty and confidentiality in dealings with the board
- Support the organization and officers in times of controversy and crisis
- Fulfill commitments on time

\* Source: *Boards on Fire: Inspiring Leaders to Raise Money Joyfully*, ©2010 Susan Howlett, All rights reserved.

do. And when they understand that board and staff will hold each other accountable through a respectful and routine process, they will feel supported enough to do their job.

1 Susan Howlett has helped nonprofits raise money joyfully for thirty-five years, as a board member, development director, an executive director, and — for the last twenty-three years — as a consultant to more than 1000 organizations across the U.S. She has worked with unstaffed organizations with tiny budgets and national organizations with multi-billion dollar budgets; with grass root groups, and sophisticated mature institutions; in every field imaginable. She has been core faculty in the University of Washington’s year-long Certificate Program in Fundraising Management for twenty years.

Co-author of the widely-used *Getting Funded: The Complete Guide to Writing Grant Proposals*. Susan is hired regularly by grantors to strengthen the nonprofits they fund. She has spent decades leading several professional associations, and served as a subject matter expert for the National Grant Professionals Certification Institute. And she’s been a funder herself in several contexts. A sought-after speaker, trainer and mentor. Susan is known for engaging her audiences in joyful discovery

with the liberal use of stories, humor, and chocolate.

Susan was the well-received keynote speaker during the opening plenary of MIE’s 2015 National Fundraising Conference in Bellevue, WA. For more information about Susan and *Boards on Fire: Inspiring Leaders to Raise Money Joyfully*, visit <http://susanhowlett.com>.

2 [www.boardsource.org](http://www.boardsource.org). See also, the list at end of this article.

**What Board Members Can Expect from the Organization\***

- Clear and reasonable expectations
- Consistent, timely communication from staff
- Access to any information needed about the organization
- Training, encouragement and strategic advice to carry out tasks
- Respect for the time, views, and talents you offer to the board

\* *Id.*

*Continued*

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## Sample of a Customized Board Member Contract\*

Board Member: \_\_\_\_\_

Mission of the organization: \_\_\_\_\_

*My Commitment to the mission of this organization inspires the following pledge:*

### 1. Personal Gift:

- I will personally contribute \$ \_\_\_\_\_
  - I will make that gift in the following way:
    - with a check or cash: monthly/quarterly/yearly
    - you can charge my credit card: monthly/quarterly/yearly
    - through the workplace campaign, using payroll deduction
    - by transferring appreciated stock or other appreciated assets

### 2. Raising Money:

- I will take responsibility for stewarding relationships with current donors.
- I will take responsibility for cultivating relationships with prospects.
- I will personally approach cultivated prospects or donors to ask for a gift.
- I will accompany more experienced solicitors on donor visits.
- I will call existing donors to ask them to renew their support.
  
- I will introduce the organization to # \_\_\_\_\_ contacts from my circle of influence.
- I will approach those individuals through
  - personalized letters
  - telephone calls
  - e-mail messages
  - a house party or office party
  - personal visits
  
- I have access to the mailing list of the following club, organization, spiritual group, employee group, fraternal association, professional association, trade union, or subscription list: \_\_\_\_\_  
\_\_\_\_\_
  
- I will write support letters to companies or foundations where I have contacts.
- I will accompany the Executive Director on a visit to a potential grantor.
- I have contacts with the following corporations or foundations: \_\_\_\_\_  
\_\_\_\_\_

### 3. In Kind Contributions:

- I will make the following in-kind contribution \_\_\_\_\_
- I will solicit in-kind contributions from others with whom I have contact.

### 4. Major Events

- I will help find a sponsor for: the fall event/the spring event
- I will be a table captain (securing 9 guests) to the spring event
- I will serve on the planning committee of: the fall event/the spring event
- I will secure # \_\_\_\_\_ volunteers to support: the fall event/the spring event
- I will help with: set up/clean up/greetings/ decorations/rides

## Sample of a Customized Board Member Contract (continued)

### 5. Committees

- I will serve on the following committees: Finance/Board Development/ Advocacy/Communications

### 6. Media Work

- I am willing to contact reporters, editors, or producers to pitch stories
- I am willing to write letters to the editor in conjunction with staff
- I am willing to write content for our newsletter or website
- I have personal contacts with \_\_\_\_\_

### 7. Advocacy

- I am willing to reach out to elected officials to discuss our issues
- I am willing to attend/speak at public hearings or coalition gatherings

### 8. Other

- I am also willing to contribute in the following way(s):

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Signature \_\_\_\_\_ Date \_\_\_\_\_

*These commitments will be reviewed during the year with the Board Development Chair*

- \* Source: *Boards on Fire: Inspiring Leaders to Raise Money Joyfully, 2010, Susan Howlett*. Adapted from a contracted crated by Octavia Morgan of the International Gay and Lesbian Human Rights Commission. Printed in the *Grassroots Fundraising Journal*, 1998.