

# Boards on Fire!

INSPIRING LEADERS TO  
RAISE MONEY JOYFULLY

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## You're Not Alone

You've asked board members to approach others to support your organization, and they say they will (and probably mean to)—but they don't.

You're not alone. Most board members behave the same way.

Countless books, videos, workshops, and conference breakouts have been devoted to getting boards to raise money, but they focus on tactics and rational solutions.

What they don't address is the **deep-seated resistance** board members feel when they're put in the position of asking.

This book will help you understand the sources of their resistance and what **you** can do to remove the barriers that keep them from raising money joyfully.

Whether you're the executive director, development director, board president, chair of the fundraising committee, or a consultant, you can help your colleagues look at the systemic patterns that keep leaders from igniting their passion.

Thankfully, you already hold the answers found within these pages, in your mind and your heart: they're just arranged differently. I trust that by seeing the solutions in this light, you'll be able to foster happier, more engaged boards who experience joy and satisfaction in fundraising.

## Jumping In: Leaders Know When They're Not Safe

When my kids were preschoolers, we took them to the neighborhood pool for swimming lessons. The first night, I was intrigued by a mother at the side of the pool who could NOT get her three-year-old into the water. She kept yelling at him to “Just get in!” and he just kept crying and screaming “Nooooo!” The mother reasoned, “Look! The teacher’s right there in the pool. He’ll catch you. Go ahead and jump! It’ll be fine.” But the youngster held his body stiff and screamed even louder.

What the mother failed to appreciate was that the little boy’s response was cannily appropriate. He knew he couldn’t swim and he had no proof that the teacher would catch him. He knew that when he threw things into water, sometimes they floated—and sometimes they sank to the bottom.

I wished the mother would have congratulated her son on his good instincts and affirmed that he was smart to sense that it isn’t safe to jump into the water if you can’t swim. Then she could have sat down beside him on the edge of the pool, stuck her toe in the water, invited him to join her, and had him watch while another child jumped in and got caught—all while waiting calmly with him to make sure he felt safe.

Just like that mother, we insist that our leaders jump into the scary waters of asking for money, urging them to ignore their own guts, which warn of embarrassment and rejection. We should congratulate them on their reluctance, not get exasperated with them. They sense that something’s not quite right—and they’re correct.

When we look at the root causes of their fear, we may find that there are systems in our organizations that need tending. It’s easy to point fingers and say the board isn’t doing its job, or the staff isn’t supporting the board. Those may be true, but they’re only symptoms that something deeper and systemic needs to be repaired or refreshed. If we attend to those systems—named as barriers in the pages that follow—we can dissipate the fear. And our board members can become proud stewards and powerful ambassadors on behalf of the organizations they lead.

If we want everyone to do their part joyfully, it’s best if both board and staff address those barriers together. Here’s how.

## BARRIER 1

### 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 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 workplace campaign, the event, or the major gifts effort). Some say that fundraising is all they're being asked to do all the time.

#### OVERCOMING THE EXPECTATIONS BARRIER

##### *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 the 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*

## 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 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 on 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 toward 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.

For the first document, I use the standard "Roles and Responsibilities of the Board" from BoardSource (see end of chapter). One of the items on that list is "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 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 suggest a *customized* contract that each board member creates with the appropriate committee (nominating, board development, governance committee) and signs, taking one copy and leaving one 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 a generic example at the end of this chapter, and samples from two nonprofits on my website at [www.susanhowlett.com](http://www.susanhowlett.com).)

## 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 performance reviews with trustees to see how they felt about their original commitments and their performances in relationship to them.

## COMMITMENTS THAT MAKE THEIR HEARTS SING

I often make a comparison between finding the right jobs for people and making a loaf of homemade bread. In order to make a loaf of 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 into 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 who 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.

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 how they can add optimal value in ways that suit them, thus helping the organization thrive.

### *...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 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've agreed to 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.