

How to tame your board

A ChangeStar guide for the frustrated fundraiser

Introduction

A fundraiser's relationship with senior management and their board of directors is critical.

We have seen fundraisers (especially in smaller-to-medium-sized charities) become frustrated with their boards when there is an unwillingness to trust or invest in fundraising, so we felt it was time to offer a few ideas to help. Why are we qualified to do this? Well, we've been through this process ourselves when we were on the client side, and have also helped our clients to (successfully) undertake these negotiations with their boards or councils.

This guidance doesn't just apply to board members and senior staff - you can use it with anyone in your organisation who has concerns or suspicions over the role of fundraising for your cause.

5 ideas for the frustrated fundraiser

1. Understand their aims and priorities

What are the board's aims and vision for the organisation? How much do they want it to grow? Are they driven and determined to grow the organisation or are they happy to keep it moving along at its current pace?

These are vital questions and ones you should be asking at your job interview – because if the board has a vision and commitment to growth it's obviously a lot easier to justify investment in fundraising! And if they don't, then you need to ask what sort of role they want fundraising to play in the organisation, and whether this fits with your vision for it.

While you're in the job, take the time to understand and empathise with the board's strategic priorities so you can see the other pressures on them, and can show how fundraising can ease these.

2. Let the numbers do the talking

You can talk about the effectiveness of fundraising until you're blue in the face, but in the end nothing will convince a board like good, hard numbers. Show them – in accessible, simple terms – the impact that your particular fundraising project will make to their finances and strategic goals. Give clear numbers, not generalisations.

The most powerful numbers are of course the results of appeals that you've run within that organisation, but if you don't have any previous results for particular activities you're trying to get approval for, then use examples from other (comparable) charities and, if you can, put your board members in touch with their peers at these other charities to back up this evidence and discuss it. A peer advocate can be powerful.

3. Take your opportunities

Timing is everything. When an appeal does well, everyone is happy and the complements flood in from even previously suspicious board members. Confidence (and the willingness to take more risk) increases.

This is the time to get that slot in the boardroom or at the council meeting where you can show them the value of investing more in recruitment or in reinvesting the income you generated above the target back into fundraising.

Leave it any longer and you risk the diminishing of this sense of confidence and positivity, and the board will want to wait to see how the next appeal does. Leave it until the next appeal and you've completely lost your opportunity, as (certainly in the minds of a tentative board in the early stages of fundraising activity) you're only as good as your last appeal.

And this is often a source of great frustration for fundraisers - an appeal does brilliantly and the next appeal does well but not quite as well (for perfectly good reasons), and board confidence begins to collapse and more questions get asked.

So, the lesson is - make the most of it when things are going well. As soon as you start getting the results in for the appeal and they look positive – book that slot in the boardroom.

4. Educate your board

Many of your board colleagues will not be experts in fundraising so this gives rise to two pieces of advice.

- First, take the time to inform your board about how fundraising works - for example, the scientific nature of DM, how to minimise risk through testing and the

importance of taking opportunities when tests have been successful. Show them how the creative and asking techniques work. The latter point can make a difference for members of a board who have a negative view of fundraising or marketing, or are irritated by particular aspects of fundraising packs (for example the repetition of asks). Our 'How to write a strong fundraising appeal' guide has helped some organisations to communicate this to their boards and staff – get in touch if you'd like us to send it to you - info@changestar.co.uk.

- Second, show them how things work on the numbers side - explain any unfamiliar concepts to them and talk through the need for ongoing investment and time for the return on this investment to arrive. Offer to keep them informed about fundraising progress with an easily digestible 'dashboard' of figures each month (number of new recruits, lost value from attrition that month, value of ongoing regular gifts etc.) - figures that help to reinforce your key arguments about investment. Again, do let us know if you'd like help in developing this dashboard - info@changestar.co.uk.

Overall, don't make any assumptions about the level of previous knowledge that your board members have, and don't take their knowledge for granted. Don't use jargon or unnecessary figures, and make sure people understand the background behind any ideas or concepts you're discussing. Your board wants what is best for the organisation, so if you can make them more comfortable and confident about the use of fundraising, this may help you to move forward.

5. Be patient...but not too patient

It can take time to get a board's trust in fundraising, particularly if you need to go through an education process with them first, so do be patient and take the time to deal with their (perfectly justified) concerns rather than get frustrated with them.

Ultimately, if you've taken the time to educate them and have given the role some time but things are still not happening then perhaps you need to consider whether this organisation is the best place to use your skills...but hopefully that point is some way off, and by trying some of the suggestions above you can arrive at a better place with your board in the not-too-distant future.

More information and support

We hope these ideas have been helpful, If you'd like further support or ideas in approaching this, or any other aspect of fundraising or seeking change, then don't hesitate to give me, Richard Docwra, a call on 07968 227029.

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