

Who's Driving this Train?

How Board and Staff Work Together to Create More Mission Money

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When teaching, I like to use a train analogy (living in Ashland makes my life all about trains!) to explain fundraising to people who don't understand it:

Donors are like train passengers – they get on the train at different points along the route and they pay for different kinds of seats – economy, business, or first class. But they're all on the train because it's going somewhere they want to go.

Donors want to support a cause or a project that is consistent with their philanthropic priorities, but also because they trust the organization to do what they say they are going to do with the money. So, using the train analogy – who drives the train is critical to fundraising success.

The **railroad owner** (i.e. the Board) decides what territory the train will serve, how many trains will go where, and what or who the train will carry (mission and strategic plan).

The **railroad engineer** (i.e. CEO) is the engine driver and is in charge of making sure that the mechanical operational and all train matters are functioning at optimum efficiency (strategic direction of the mission).

The **conductor** (i.e. chief development officer) is responsible for making sure the train stays on schedule, that passengers and cargo are picked up and dropped off properly, taking tickets and other customer service duties, and ensuring that safety rules (ethics) are followed and paperwork filed (strategic management of the plan to fund the mission).

Of course, there are lots of other players who make a successful rail transportation system possible, but you get the picture. Fundraising is no different in concept. We just use different words. So how do we keep the *fuzzy lines* between our roles and responsibilities from becoming a *continental divide*? The simple answer is a better use of our words – using fewer negatively loaded words (fundraising) and more aspirational words (matchmaking) when we talk to board members and volunteers.

Experienced development professionals and volunteers know that fundraising isn't about asking rich people for money. It's about building relationships and getting to know the philanthropic priorities of donors and prospects. When done right, the "ask" isn't the big scary deal that so many people are afraid of, but

rather just the transaction that makes the donor's intent "official." One of my favorite mentors, Wally Stettinius, once said to me that fundraising is like sex – if you have to ask, you're premature!

When you tell a board that it's their job to "ensure adequate funding" they all equate that with asking their wealthy friends and colleagues for money. They will resist and tell you that it's not their job. However, board members must be made to understand that they must support the work of the fundraising staff rather than the staff being there to replace the board's responsibility.

Telling them that it IS their job doesn't usually work. Making it easier for them to understand is more about using words like these listed below. You will likely get better results and you will be training your board to raise money without actually admitting to them that you're doing so. A few will figure it out, but they will support you because you're making it easier and more fun for everyone – like it should be. More money = more mission = a better world. Who doesn't want to help make a better world?

Some aspirational words include:

Lead: Board members are the highest level leaders of the organization; it is their vision for a better future that inspires confidence and commitment from staff and donors.

Build: Focusing on a strategic plan and how each member of the board, staff, and donors can work together and build the future that better serves the community is the biggest contribution to raising more friends and funds for the mission.

Give: Board members who give – especially those who make a "stretch" gift to the annual, capital, or legacy campaigns – are demonstrating their own commitment to the cause. A board that isn't behind you 100% isn't doing you any favors, no matter how many of them are helping you raise money.

Thank: Board members who write personal thank you notes, send thank you emails, or make thank you calls have a positive impact on future giving. Good stewardship increases donor satisfaction, which increases net funds raised.

Inspire: Board members can inspire others by telling the story of what makes your organization so special and why they support it. No matter how many times you tell the story, no matter how many people you tell it to – you haven't told it enough! Being an ambassador is one job that every single board member can do well if given the tools.

Connect: Opening doors to friends, colleagues, and family members who might be interested in in your organization may involve simply coordinating a meeting. Board members can accompany the CEO or Chief Development Officer and exude the passion – let the staff make the formal ask.

Listen: Board members who encourage volunteers and donors to share their thoughts about the organization and really listen to them will often be inspired by what they hear. People remember their conversation with you when they have had a chance to talk – and sometimes it even helps them confirm their commitment and want to live up to their goals for the organization.

Host: Board members can host (and pay for) cultivation gatherings in their home or business. No money is solicited, but often beneficiaries share their appreciation of the organization’s work. Sometimes two or more board members get together to make it feel less risky and more like a social event.

Engage: Ten people inviting ten people gains more than one person inviting a hundred. Bringing new guests (whether you pay for them or not) to events helps to introduce your organization to a new circle of potential supporters.

Bridge: In a confidential setting, board members can review your list of donors and prospects to share what they know about their philanthropic interests.

Volunteer: Some board members love working events – either on a planning task force or “working the room” to make participants feel welcome – introducing them to the CEO and other board members.

Clarify: Sometimes board members don’t know what information they want or need to know how well the organization’s fundraising program is doing. A conversation about the data – how it’s collected, what it means, and how the board and staff will use the data to move the organization forward – clarifies for everyone where the development program is succeeding and where it needs adjustment. Gift acceptance policies and fundraising reports both fall into this category of clarifying expectations.

Who’s driving the train? The simple answer is – we all are. We can’t do it alone – it’s either a team effort or the train is going to derail somewhere down the tracks. We all know what that looks like, don’t we?