“Money makes the world go ‘round,” sang the leads in Cabaret decades ago. In the animal welfare world, though, money can be hard to find. And who wants to shuffle through the wizened faces of Benjamin Franklin and Ulysses S. Grant when the faces of rescued animals are so much more lovable?

And yet, it’s money that keeps the roof over their sweet heads—and helps shelters and rescues do their lifesaving work.

While larger organizations often have a development director and staff, and even fundraising volunteers, smaller shelters and rescues may not. But almost all of these groups will have a board of directors. These folks may be volunteering for myriad reasons, and are at the heart of their organizations—providing leadership, governance, and oversight.

But board members can also play a role as fundraisers for the organization—a role which, depending on the individuals’ personalities, may not come easily. Some board members may embrace efforts to raise funds with ease, determination, and enthusiasm. For others, it may be a scarier prospect.

“In most instances, board members have never been asked to and/or were never expected to be fundraisers, so many of them are very uncomfortable with ‘making the ask,’” says Martha Armstrong, director of development for the Friends of the Young-Williams Animal Center in Knoxville, Tenn.

Efforts to encourage board members to help the organization drum up financial support may be both rewarding and frustrating, but there are some tricks of the trade that seasoned shelter leaders have found useful.

Setting Clear Expectations
Many board members shy away from fundraising because they never considered it part of their responsibilities. You can’t expect people to do something that’s not in their job description, so make sure all board members, both current and future, are aware of the organization’s expectations.

Outi Flynn, director of knowledge resources at BoardSource, a Washington, D.C.-based nonprofit devoted to helping boards advance the public good, says that organizations need to make the expectations explicit. “If the organization solicits funds, it makes sense that board members are involved in the activity,” she says.

Armstrong says it’s smart to hold a meeting of the board members to remind them that they need to live by the “3 Gs,” a well-known mantra of board service: give money, get money, or get off the board. Board members who feel unable to help develop organizational resources, according to the maxim, may wish to let someone else step into the role.

“Spell out in advance of recruiting new board members the requirement for ... being actively and enthusiastically involved in fundraising and donor development,” says Armstrong.

Your board manual is an ideal forum for spelling out fundraising expectations.

Armstrong notes that many nonprofits include “gets” in their overall expectation of board members’ annual obligations to give, making it clear that board members are expected to provide their own donations and also seek specific amounts from others.
“Set clear expectations and board fundraising goals,” says Shelly Moore, CAWA, president and CEO of the Humane Society of Charlotte in North Carolina. “Make it part of your annual plan and [a] revenue line item on the budget.” If board fundraising is a budget line item, it will be well-noticed by these very same leaders should the numbers fall below projections.

Make it clear what kinds of giving will count toward board members’ personal totals. “The board must draft a fundraising and personal giving policy,” says Flynn. The organization’s leaders need to determine if in-kind and pro bono donations count toward the totals. Such decisions need to be carefully made, lest the shelter receive gifts that it cannot use or does not want—especially when donations of cash are the true objective.

Inclusion of such gifts in board member totals can make tracking a “get” dollar amount challenging, says Judy Calhoun, CFRE, CAWA, executive director of the Larimer Humane Society in Fort Collins, Colo. But she argues that in-kind contributions and pro bono services would be acceptable inclusions if they are truly helpful to the organization. And Moore says that she would definitely count the value of major items—such as a vehicle or an HVAC unit—that board members get donated.

Starting at the Top

Many organizations rise and fall based on the quality of their leadership, so it is vital that board fundraising be embraced by not only staff, such as the CEO and the development director, but also by the board chair. This person might be the most vital one to engage when trying to jumpstart the organization’s volunteer board as fundraisers.

“It all starts at the top,” Moore says. “The board chair must make it a priority for the board.” She suggests that the board chair serve as an ongoing peer coach, communicating with the entire board on development priorities.

The importance of roping in the board chair as a cheerleader for board fundraising efforts can’t be overstated. “She or he can set an example, recognize board members who are helping with fundraising, and remind board members of their role,” explains Calhoun.

Calhoun doesn’t think the board chair should single out those who are falling beneath expectations. Staying positive, she says, means celebrating their achievements—rather like the reward-based training practiced by the best animal trainers and behaviorists!

The chair can lead by example, making the topic a priority at meetings. “Development must be an agenda item at each board meeting, with not just reporting progress but identifying action items for the upcoming month,” says Moore.

The board chair should also practice what he or she preaches. “If he or she is not willing to set an example of the need for all board members to give of ‘time, talents, and treasures,’” says Armstrong, “then the organization risks other board members not giving their all to assist the organization in raising funds.”

Board chairs may wish to pay more attention to board giving as a way to further the board’s fundraising success. Board members’ gifts not only help the shelter’s cash flow, but also can serve as models when seeking more funds. “An appeal is particularly convincing if a board member uses [himself] or herself as an exemplary donor,” according to Flynn, who notes that “some boards tie fundraising and personal giving closely together.” She adds that some grant-making foundations only contribute to organizations where every board member is a contributor.

Staff Endeavors

While the board chair can move the needle, the organization’s CEO and development director can also do a number of things to encourage board fundraising. For an inexperienced or shy board, the first step is typically education.

“They need to be trained!” says Pamela Burns, president and CEO of the Hawaiian Humane Society. Inaction, she believes, usually results from asking board members to do something for which they’re unprepared. She suggests involving them with small initiatives to start, such as calling to thank donors; getting to know them over lunch, dinner, or a tour of the shelter; or hosting a donor at an event.

Moore suggests providing educational email blasts on board fundraising. She’s
had success with Gail Perry’s blog, Fired Up Fundraising (gailperry.com). Armstrong suggests the resources from BoardSource (boardsource.org) for materials that can inform both board and staff members on this issue.

When training and working directly with board members new to fundraising, it is wise to start small and tailor fundraising efforts so that they become motivated by success. “Get them involved in any aspect of cultivation or stewardship,” and make sure that their first experience is successful, Burns offers.

Early failures caused by being tossed into “the deep end” can turn board members off the process, limiting their growth. To have unseasoned board members asking a donor for an amount that’s far beyond their giving capacity, Burns says, would be a negative experience for both donor and board member. “A sense of success is critical,” she says.

Calhoun suggests helping board members develop a comfort level with all aspects of fundraising: identification, cultivation, solicitation, and stewardship of donors.

“Make it easy for them, and determine what aspect of the fundraising plan each board member can feel comfortable with, and capitalize on that,” Moore says, emphasizing the need for a positive focus on a job well done. “Recognize and celebrate success; it’s contagious.”

Learning to Walk
To help newbie fundraisers, let them know that fundraising is not just about “the ask.” Identifying the best donors and prospects, and then enhancing the shelter’s relationship with them, can be an extremely valuable role for a board member, who can then turn over the responsibility for the direct ask to staff or other board members who feel more comfortable soliciting for a large gift. Staff may get a much greater return when they assist board members in navigating these relationships as cultivators, rather than expecting the board member to go beyond cultivation.

Not every board member is cut out to solicit funds, Moore says, “but all of them can and should be cultivators. Get them to set up a lunch or coffee for the CEO or director of development to meet a prospect they know. Reiterate that it’s not about asking for money; it’s about opportunities for people to get involved and make a difference for animals. Not every meeting will end with a gift, but the goal is to grow the circle of support and cultivate the prospect to give.”

Calhoun assesses each board member’s fundraising strengths, then matches them with a menu of opportunities to help. “Identify who board members know, and use those relationships to help cultivate those donors,” she advises. “Help board members understand the importance of introductions and sharing their passion; that is more important than actu-
ally making the ask for most board members.” Help them by setting up meetings and including them in activities that involve donors, so they can become more comfortable representing the shelter.

It is vital, Calhoun notes, for them to see the importance of relationships. Fundraising is mostly about building relationships between donors and the organization, she says; board members need the support and space to get comfortable saying, “I can introduce this person, but not solicit them,” or “This is someone who should be connected to our organization. I’m not the right person to move the connection along, but I can help you find the right person.”

Calhoun recalls working with a board member who was a lawyer with numerous contacts in the community, for example, but some of them were current or former clients, so it was not appropriate for him to contact them on behalf of the agency.

**Getting Personal**

To evaluate the capabilities of each board member, an in-person discussion is both necessary and optimal. That way you can help develop a tailored path for each board member, one that has the best possibility of success.

“Meet with each person individually and formulate a personal plan for them on how they will contribute to accomplishing the annual board fundraising goal,” Moore suggests. “Keep this in a formal document that the board member, board chair, CEO and director of development can refer to throughout the year.” And don’t just communicate once, she says: “Talk about it, talk about it, talk about it. Every communication with a board member should include something about fundraising.”

She also advises having another person on the board—perhaps someone more experienced, but ideally not the board chair—serve as a peer-to-peer coach to work with them on an ongoing basis. “Board members are always hearing from the chair as to what their responsibilities are. It is so powerful to have a nonleader of the board coach other board members,” because it demonstrates
commitment and is also less threatening, Moore explains.

Coaching doesn’t have to be internal, either—a nonprofit board can get help from a revenue-raising expert not employed by the shelter. Such outside consultants have specialized credibility, Burns says, and can discuss other community boards’ concerns and successes, as well as realistic expectations and performance benchmarks.

Armstrong says that enlisting the services of an independent consultant “helps to make the message less personal and judgmental, as the outside consultant doesn’t have a personal history with any individual on the board and should be able to give examples of other organizations who have gone through similar fundraising challenges.”

Wrong Turns
Staff leaders will want to avoid making the most common and damaging mistakes that diminish board members’ fundraising success.

“Nudging too much or not enough” is one such error, according to Calhoun. “I don’t know that there is a perfect amount, but I think both extremes can be off-putting to board members.”

And don’t avoid the subject, says Armstrong. “If I think the more seasoned CEO [or] development director will have this conversation early on with the board chair—even during the interview process when moving to a new position,” she says. “The [employee] should form an alliance with the board chair early on during budget planning and lay out what the fundraising goals are for the organization and where potential sources of revenue are likely to come from ... and then establish what reasonable targets are” for board members’ money raising pursuits.

That kind of partnering between boards and staff, a close working relationship focused on the common goal, is highly advisable. “It is important not to set up an us-versus-them mentality,” Calhoun says. “Development is a joint effort.”

Moore agrees that fundraising is a joint responsibility of the staff and the board. “Reminding them that you are in it together goes a long way.”

That partnership will come in handy as shelter management becomes increasingly reliant on board members to bring in donations—particularly large gifts during a capital campaign. Ideally, board members will achieve maximum development success and, buoyed by their past achievements, reach new heights of fundraising skill and accomplishment.

And a good working relationship might even encourage boards and staff to celebrate their successes via a Cabaret-style chorus when the dough starts rolling in. “Get a little / Money, money / Get a little / Money, money.” (Just don’t scare the cats.) AS

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