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by Barry Nickelsberg



The fund generation game

“Trade places with me,” I often tell a business executive who is a member of a governing board and whom I am training in fundraising responsibilities.

“Let me take over your business for a day. If I do, decisions will have to be made for which I will lack the training and experience,” I say. The same is true about members of boards who need to do fundraising for the first time. Initially, they will not have the experience and understanding to do the work successfully, but they can certainly learn and go on to make the financial future of their organisation secure.

Most fundraising requires three types of people: those who are good in face-to-face encounters; those who are good on the telephone and those who are good writers.

Now conventional wisdom in the USA says that all board members must be actively involved in fundraising for their organisation, but that position seems unrealistic to me. We are all good at different things, so it may be possible for every single member of a board to be effective at fundraising. Instead I usually start with the two or three members who are confident and at ease making face-to-face visits to ask for donations. Personal visits such as these are made to potential donors to seek gifts from £10,000 up.

On their first visit one or two of these enthusiasts will call on a person whom we know will not make a donation.

Instead the visit serves to build confidence and experience by allowing the board members to try out their approach and hone their skills in a friendly setting. They can have an easy half-hour visit with a person who is interested in organisation and make an effective presentation of the reasons why a donor should support the cause.

With this experience behind them, these individuals can proceed to the next two or three visits. The proper preparation and research means some of these visits are likely to be successful in generating donations. Now the board members can return to the full board with reports of progress, success, and most importantly, money. They gain confidence and assurance, and the board recognises accomplishment.

Now comes a critical turning point. If the successful board members present their report with enthusiasm and conviction, other board members who were initially reluctant to become involved in fundraising can begin to see new possibilities in the work. Most importantly, they will begin to think, “If they can do it, so can I.” Then really exciting things will start to happen. Maybe even a sense of competition will develop among board members themselves to see who can be most effective.

The one requirement that cannot be changed is for every member of the governing board of any organisation to make a contribution to the organisation first. The people who make calls on potential donors must be able to back up

their request with the hard fact that those closest to and most responsible for the organisation have contributed in order to demonstrate their commitment to the cause. Anything less will seriously dilute any request for financial support.

Whether it is the first or the 200th visit, any board member who makes a call to request financial support must be fully briefed and well informed about the person who is being visited. Gathering this information and presenting it to board members is a crucial staff function.

Every scrap of information about a potential donor is important in establishing mutual interests and connections between the donor and board member. For example, if homework is done carefully, the board member can say, “Oh, I see you have a son at Sherborne this year. It’s a wonderful school. My son is there, too.”

Now a common interest is shared and the elements are in place for trust, understanding and friendship — the basis upon which large gifts are made.

Fundraising is accomplished one-on-one, one person asking another person to contribute. When one person, and then another, and then others on board accept their personal responsibility, first to give themselves, and then to invite others to a cause they believe in, then success is assured.

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