

# Three Reasons Why Your Board Doesn't Fundraise and How To Fix It

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Presented by: **Barbara O'Reilly, CFRE | Principal**



**Windmill Hill**  
CONSULTING

# Nice to meet you!

**Barbara O'Reilly, CFRE**  
Principal

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30-year career as a fundraiser, earning my stripes at big shops like Harvard, American Red Cross, National Trust for Historic Preservation

CFRE, AFP Master Trainer, Past President, AFP Washington Area Metro Chapter, Chair, Research Committee, Giving USA Foundation, Editorial Review Board, Giving USA Annual Report

Tailored 1:1 consulting on startups, major gifts, campaigns, assessments/studies, CEO/CDO coaching, and board training.

# What We'll Learn Today...



Three  
common  
complaints  
about  
boards and  
fundraising



Good  
governance  
practices to  
ensure your  
board is set up  
for success



Solutions that  
can turn  
around your  
board into  
fundraising  
superstars

# It comes down to:



Do you have the right people on your board?

Do they know how to help with fundraising?

Do they have the training and tools they need to be successful?



# 1

My board isn't  
made up of the  
right people.

“

Get the right people on the bus, the wrong people off the bus, and the right people in the right seats.

Jim Collins,  
*Good to Great*



# Board Report Card

	Area of Board Performance	Average Grade from Executives
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	Financial oversight	

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	Guiding & supporting the chief executive	
	Understanding board roles & responsibilities	
	Thinking strategically as aboard	
	Adopting & following a strategic plan	
	Evaluating the chief executive	
	Monitoring performance against strategic plan	

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	Monitoring performance against strategic plan	
	Understanding context of work	<b>C</b>
	Monitoring legislative & regulatory issues	
	<b>Increasing board diversity</b>	
	<b>Fundraising</b>	



# Who do you have now on your board?

## Who will you need?

Categories to Consider	Column1	Column2	Column3	Column4	Column5	Column6	Column7	Column8	Column9	Column10	Column11	Column12	Totals
Audit Subcommittee													0
Age Category													
Under 35													0
35-50	1		1		1			1	1		1	1	6
51-64		1		1			1			1			3
65 or older						1							1
Gender/Gender Identity													
Male		1	1				1	1			1	1	5
Female	1			1	1	1			1	1			5
Transgender													0
Other													0

# Who do you have now on your board?

## Who will you need?

Sexual Orientation													
Heterosexual		1		1		1	1	1	1	1	1	1	8
LGBQ	1		1		1								2
Race/Ethnic Background													
Asian-American													0
African-American		1	1	1			1			1			4
Hispanic/Latino									1				1
Caucasian					1	1		1			1	1	5
Mixed Race	1												0
Other													0
Geographic Location (Residence)													
D.C.			1		1				1				3
Suburban MD	1	1		1				1		1			3
Suburban VA											1	1	2
Geographic Location (Place of Work)													
D.C.	1			1	1					1	1		4
Suburban MD		1	1					1	1			1	4

# Who do you have now on your board?

## Who will you need?

Skills / Strengths / Experience	Current #	# Needed
Finance: Budget Oversight	4	
Finance: Investment	1	
Governance / Board Experience (NGO, nonprofit)	8	
Medical Industry Knowledge/Relationships	8	
Strategic Planning	5	
Fund Development: Grants	3	
Global Health Knowledge / Experience	3	
Education / Education Theory	2	
Fund Development: Personal Solicitation	2	
Nonprofit Program Development / Evaluation	2	
Legal	0	
Volunteer Recruitment / Engagement	0	
IT / Technology	0	
Marketing/Communications	0	

# Define Your Short-term and Long-term Needs



✓ Create a matrix that maps skills, networks, geography, demographics you currently have and what you may need to fill

✓ Identify your current gaps through an annual Board self-evaluation to gauge performance

✓ Work with Governance or Executive Committee to lead this ongoing process and set or adjust expectations

# Your Ideal Potential Board Members Have...

## Access

- Does this person have a relationship to you or other board members, staff, donors, others related to you?
- 

## Belief

- Does this person genuinely care about your mission?
  - Is this person historically philanthropic toward similar causes?
- 

## Capacity

- Does this person have the financial ability and/or networks of those who can support you at a significant level?
  - Will this person be able to commit the time needed to be a high performing board member?
-

# Where Do You Find Your Ideal Potential Board Members?

Networks of  
Boards

Current  
Volunteers and  
Donors

Community  
Leaders and Peers

Postings  
(e.g. LinkedIn  
Idealist, Taproot)

Past Donors and  
Volunteers

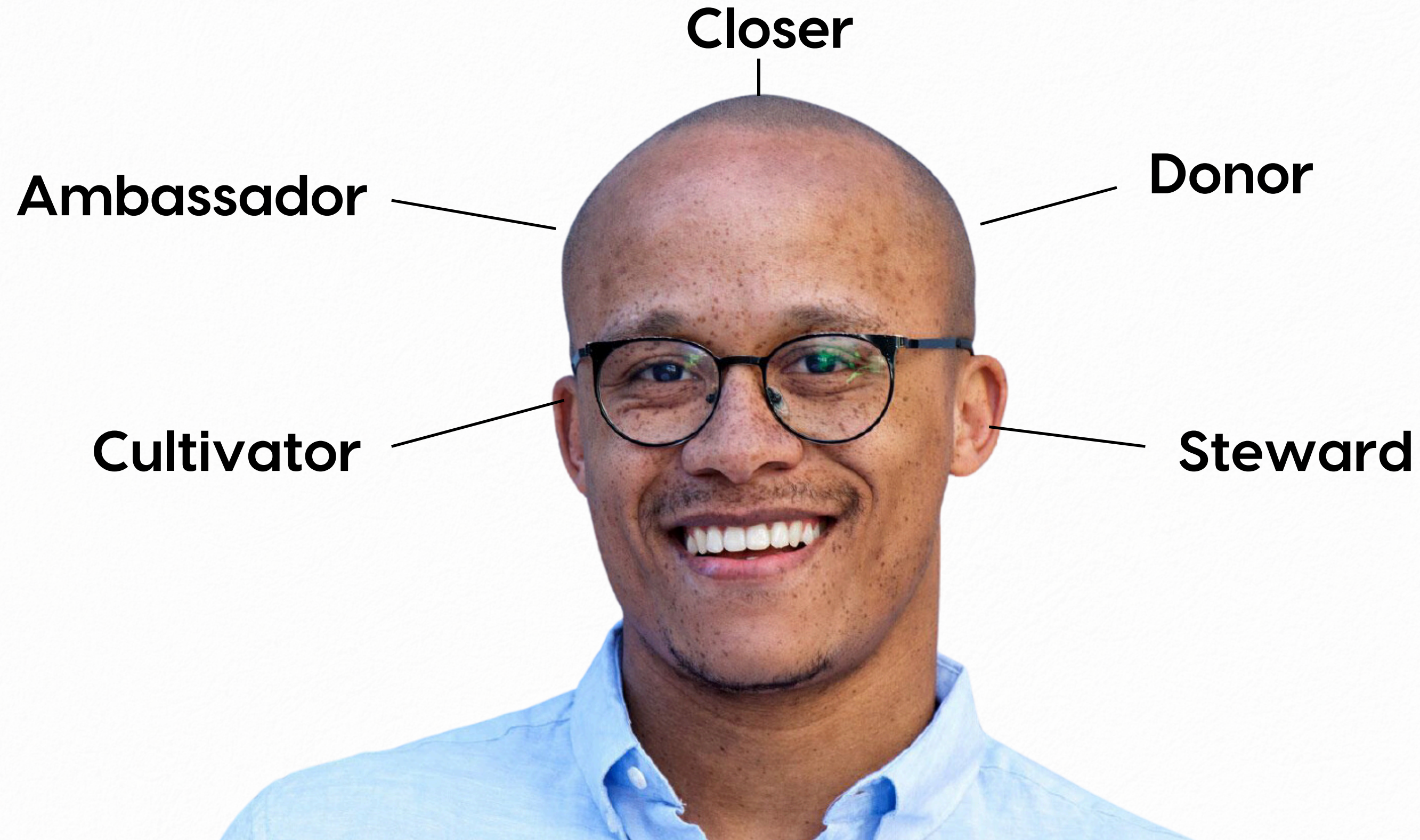


“Now let’s talk about money. Do we have any? How much would we like? Does anyone know where we can get some?”

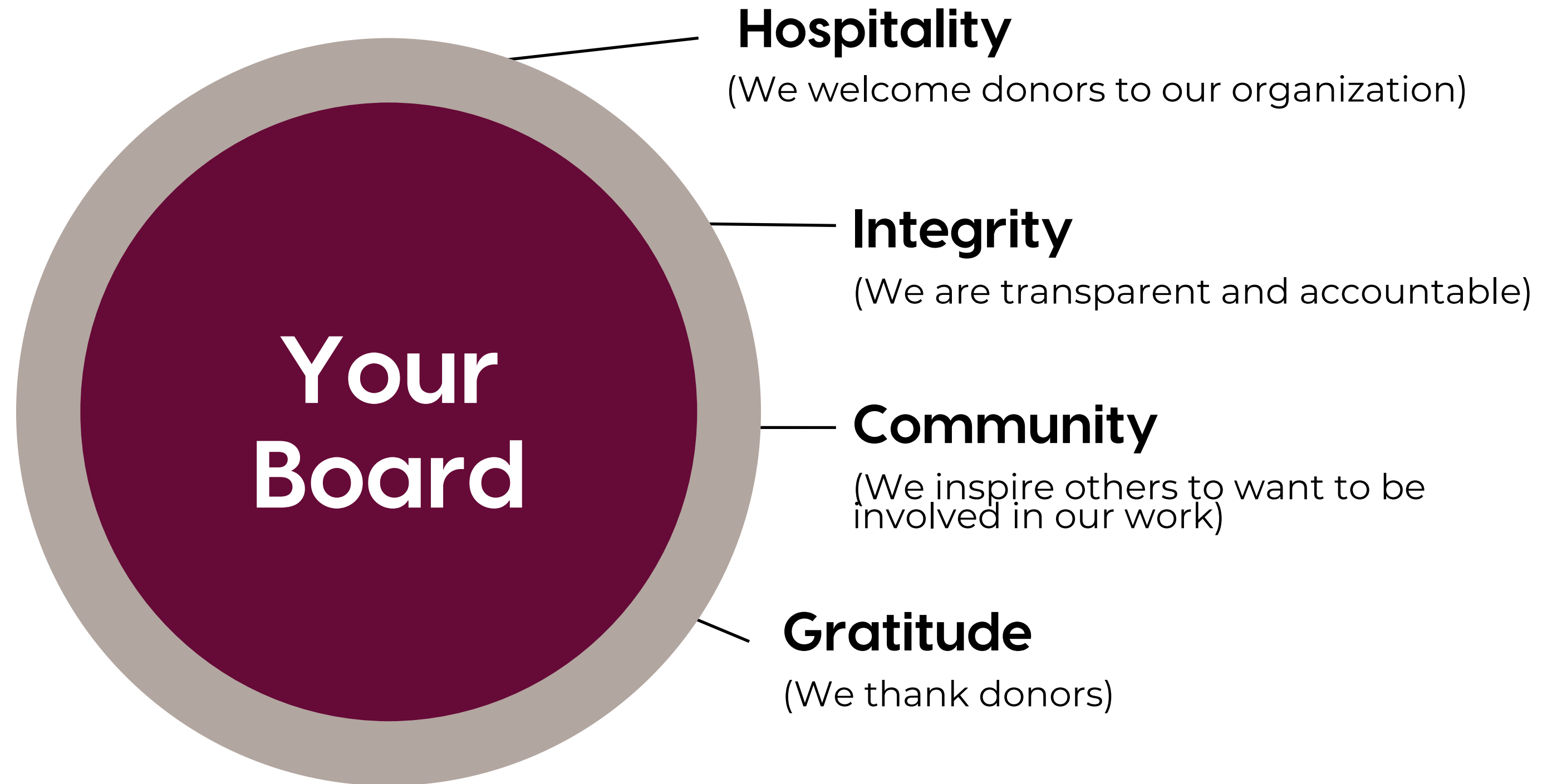
# 2

**My board isn't a fundraising board.**

# Fundraising Isn't Just Asking For Money



# Boards Lead a Culture of Giving



# Boards Influence Donor Retention

**93%**

They would “definitely or probably give again the next time they were asked.”

**84%**

They would “make a larger gift.”

**74%**

They would “continue giving indefinitely.”

# Agree to a Role for Each Board Member

Helping expand your network by offering names of personal/business contacts and/or reviewing donor lists

Writing personal, hand-written thank you notes to donors

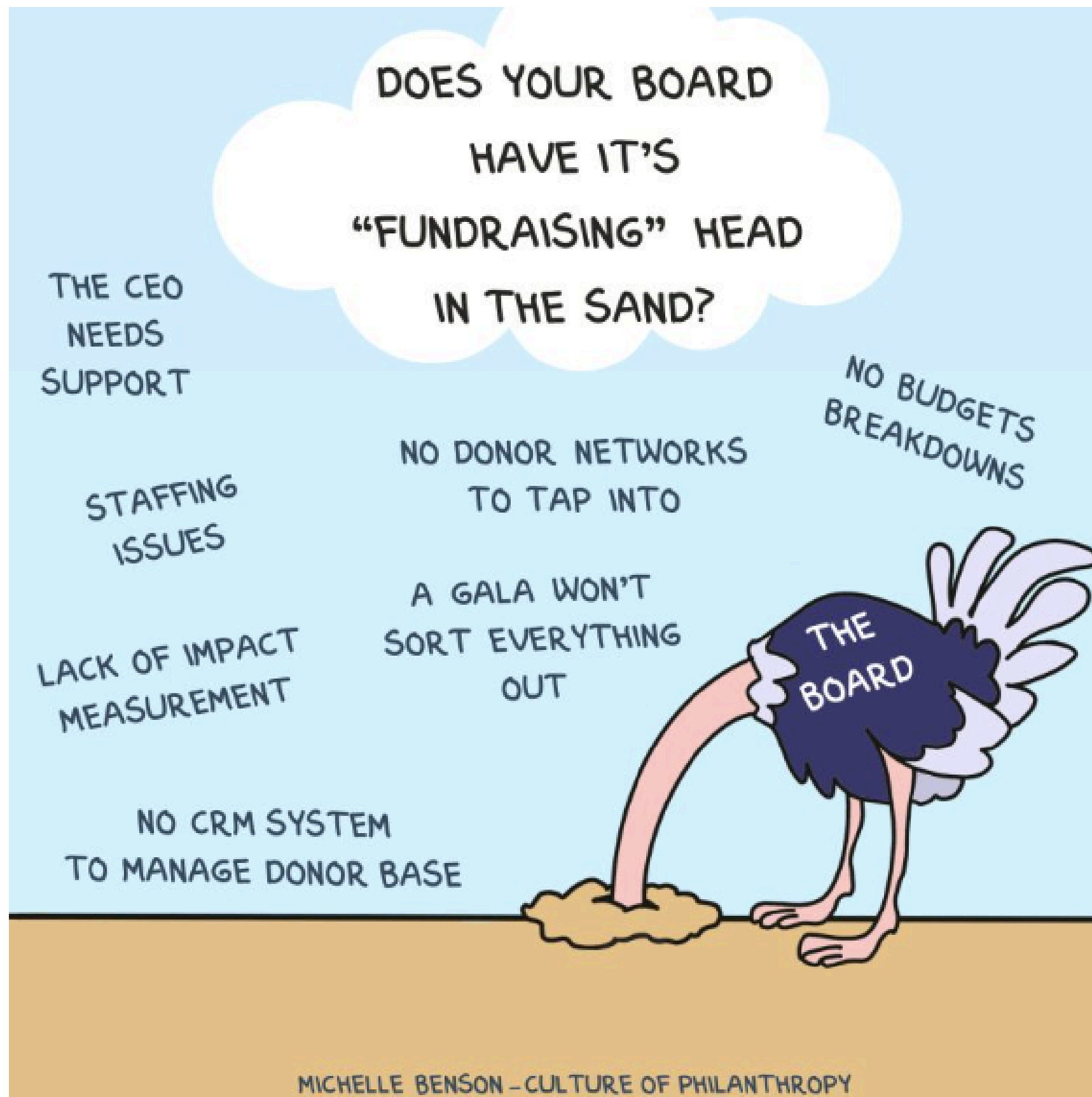
Being part of a donor engagement strategy that leads to an ask

Taking responsibility for personally cultivating or stewarding donors/guests at a special event

Contributing to fundraising events: raising money, acquiring in-kind services/items, volunteering time

Participating in training: during meeting, offsite, other

Making their own gift



# 3

## My board thinks fundraising...

...is someone else's responsibility.



“You can't be a conscientious objector to our campaign — you've got to make your calls.”

© Chronicle of Philanthropy

Templates and  
Scripts

Talking Points

Donor  
background and  
research

**Do they have the fundraising tools  
they need to be successful?**

Donor Meeting Strategy

Canned call to action

...will happen with "some grants."



# Define Expectations and Explain Fundraising

1

## Job Description

- Your expectations (time, meetings, financial)
- How they can be involved in fundraising

2

## Getting to Know You

- Mission and Vision
- Strategic Plan
- Your goals and challenges
- Their role and responsibilities

3

## Fundraising 101

- Your fundraising trends
- Opportunities and challenges
- Ways they can “fundraise”
- Tips on how to be successful

...is all about planning a lot of events.



# There's a Role For **Every** Board Member With Events

## Leading By Example

- ✓ Serve on Host Committee and/or invite others to attend.
- ✓ Issue challenge grant to use night/day of event.

## Inspiring Others

- ✓ Personally reach out to invitees—new to the event, longstanding attendees, etc.
- ✓ Be a social ambassador promoting the cause and event.
- ✓ Welcome attendees during the event—give them assignments!
- ✓ Purchase a table (or two).

## Showing Gratitude

- ✓ Thank you notes and phone calls following the event.
- ✓ Call attendees to ask about their experience attending the event.



"I'm happy to say that 89% of you have performed at or above board level!"

# 3.5

## And then what...

# Fundraising Training Is Ongoing

## Inspire them

- Mission moment at the beginning of every board meeting
- Thank you calls & notes at every meeting
- Bring clients to tell their stories

- Orientation and training sets expectations
- Give them tools and resources they need
- Follow-up with them

## Fear of Rejection

- Role play
- Discuss scenarios and responses

# Create A Culture of Accountability On Your Board

## Annual Self-Evaluation

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- How are we doing as a leadership group and as individual members?

## Term Limits — YES!

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- Can help you avoid burnout
- Without them, limits your access to networks
- Otherwise, there's no easy way to remove ineffective members

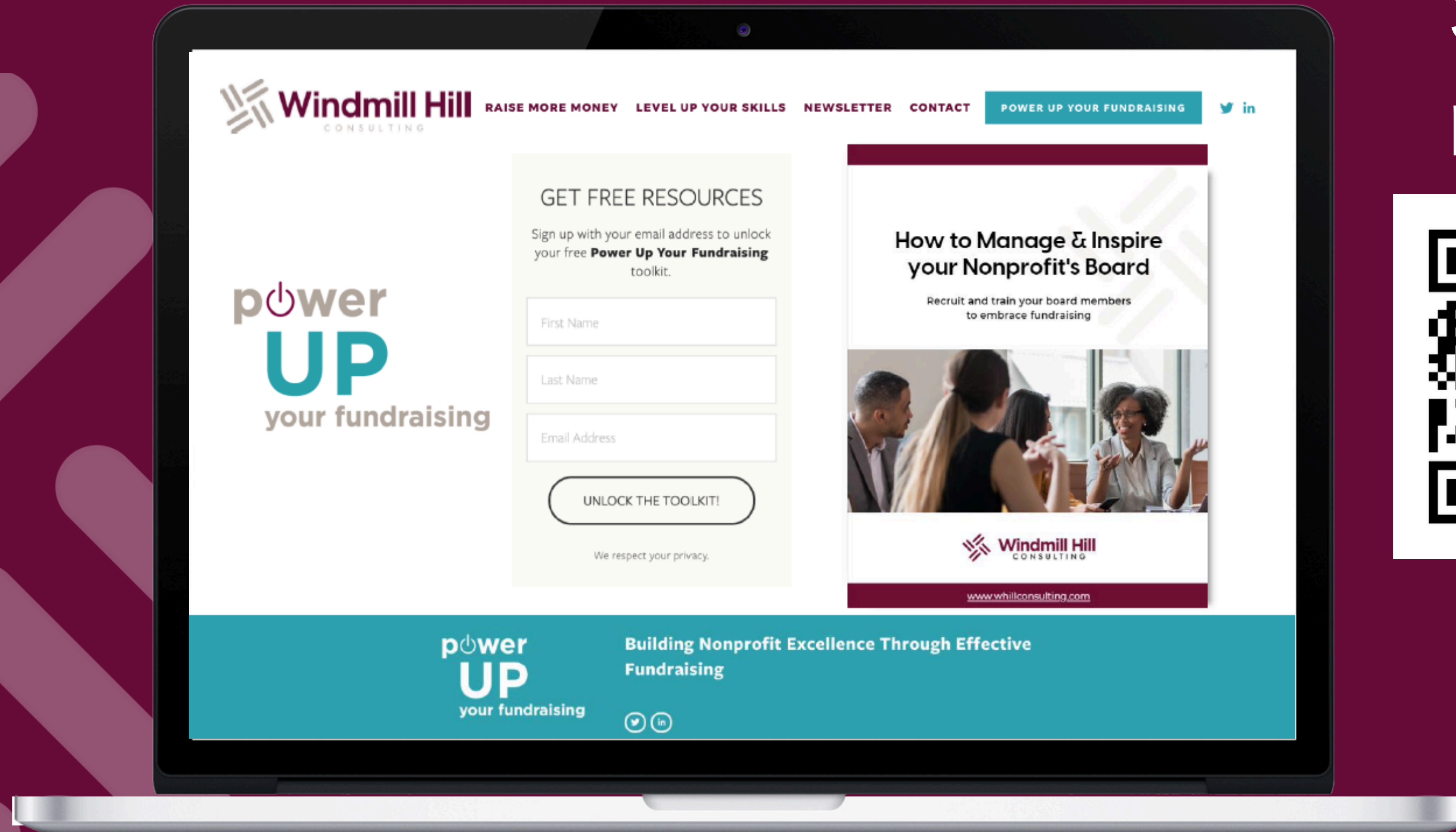
## Bless and Release

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- Self-evaluation is a good conversation opener
- Review Board expectations
- Set 1:1 meeting to learn what's preventing them from fully embracing their duties
- Thank them for their service

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Scan  
me! ✓



# Let's Stay Connected



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launching in August

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