

“Ten Top Tips for Fundraising Success: A Board Members Guide”

by Tom Conway

With growing competition for philanthropic support and donor unease somewhat widespread, non-profit organizations may choose to emphasize a back to the basics approach to fundraising. Here are ten specific ideas for Board members and other volunteers to help optimize fundraising results.

➤ **Remember that fundraising begins with the Board of Trustees.**

All non-profit organizations are governed by a Board whose duties include stewardship and evaluating mission-effectiveness. Board members, through personal contributions, attendance at fundraising events, making solicitation calls and other actions, lead by example. Board members set the tone and elevate the sights of other volunteers, donors, staff and the wider community as to the importance of fundraising.

➤ **Fundraising goals and activities should flow from the Board-approved strategic plan.**

Ideally, the strategic plan has specific objectives, e.g., adding a new client service, establishing a satellite (or new) facility, reducing the percentage of United Way support, or increasing the endowment. Understanding these objectives, the development office should craft a set of goals and work tasks to provide the necessary funds.

➤ **Development professionals are hired to raise money. Use their skills accordingly!**

Don't overload the Development Director with other duties such as writing/designing a newsletter, program responsibilities, or multiple committee assignments. Rather, confirm that a clear and workable development plan is in place which has as its components an annual fund, major and planned gifts and appropriate special events. Evaluate staff performance using objective criteria such as solicitations completed, net income generated and/or the number of new and renewal donors.

➤ **It is never too early or too late to begin a planned giving program.**

All non-profits have some donors and friends who are likely to make a bequest to the organization if asked. A bequest program can be simple and efficient. For over twenty years The Salvation Army has printed the following reminder on the bottom of every piece of letterhead: “Please remember The Salvation Army in your will.” The Army is now reaping the benefits of this direct, yet respectful, request.

➤ **Vigorous, growing, mission-centered non-profit organizations should organize a capital/endowment campaign every 8-10 years.**

Whether it's a new museum wing, expanding the service area, or improving educational programs those organizations achieving their mission can properly make the case for a major campaign. Success in one campaign generally lays the groundwork for the next effort!

➤ **Don't let special events overwhelm the development office.**

Each special event should be evaluated for its overall impact, income and effort required (both staff and volunteer). If necessary prune back or eliminate those events which have become stale, duplicative or contribute little to real revenue for the non-profit.

➤ **Establish, build and grow the endowment.**

Don't be shy about discussing endowment needs. Donors understand prudent financial planning and expect non-profits to operate in a similar manner. The non-profits of today exist through the generosity of earlier families and donors. By growing the endowment we ensure these organizations will survive and thrive for future generations.

➤ **Use consultants wisely.**

Know the scope of work or assignments envisioned before interviewing consultants. Understand that fund-raising consultants can be engaged on a project basis (such as a planning study or a development assessment) or on a periodic basis to offer advice and counsel on overall development department needs. Always ask, "Who will be serving us?" and have a conversation with that consultant before making a decision.

➤ **Don't leave your brains outside the Board room.**

You were recruited to the Board for a specific skill set—business acumen, passion for the mission, accounting, legal, marketing or fundraising expertise. Use your skills to provide overall direction and guidance. Don't be a patsy for the Executive Director! Ask questions, probe and use quantifiable, measurable data to determine fundraising results.

➤ **A graphically pleasing, easily navigable website will attract visitors, expand membership and promote contributions.**

This may be the year for a website review. Does your site tell the story, describe services and encourage electronic and personal visits? Would you use it in your business? When was it last updated? Does it have accurate links? Is it effective for fundraising purposes?

Tom Conway is president of Conway Company, LLC, Fund-Raising Counsel with offices in Cincinnati, Cleveland and Wilmington, N.C. He may be contacted at 877-526-3430 or on the web: www.conwaycompany.com.