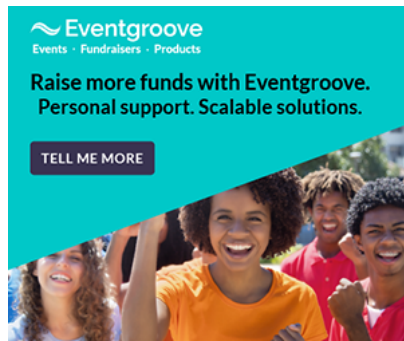


April 1, 2023 Advancing Philanthropy

Human Resources: Start Off on the Right Foot

Stephanie Cory, CFRE, CAP[®]



[\(https://www.eventgroove.com/afp-attendees/\)](https://www.eventgroove.com/afp-attendees/)

Paid Advertisement

Do your board members understand your fundraising expectations?

You've recruited new board members, and they've been elected. Do they know what is expected of them in terms of fundraising?

While it's important to clarify how your organization expects board members to participate in fundraising during the recruitment process, that may not always happen. Your next opportunity to get board members started off on the right foot is through the onboarding process.

Orientation At A Glance

First, what does your board orientation look like? Hopefully it's more robust than sending a link to bylaws, meeting minutes, and policies to new board members in advance of their first meeting. Board members need both an understanding of your organization and how fundraising works before they can jump in and help with development. They also need motivation and encouragement.

Orientation doesn't have to happen in one sitting. Consider breaking your orientation up into multiple shorter sessions versus one really long day or a rushed delivery. Figure out what topics make sense together and what is most appropriate for live and in-person versus virtual delivery.

Depending on the volume and frequency with which your organization brings on new board members, you might consider recording some of your content and delivering it asynchronously, so members can learn at their own time and pace. This learning format is most conducive to information that is straightforward and when questions are less likely. It can be as simple as recording components of your orientation using a virtual meeting or presentation tool. Online survey tools can perform a knowledge check and gauge if board members learned what they were supposed to.

Keep self-paced learning modules short to accommodate limited attention spans and busy schedules. Updates will also be easier because you won't have to re-record all your content. Board members can then view recordings when convenient for them, and you can maximize live time together.

The People Quotient

Key staff and board members can act as subject matter experts and guide the content, while the curriculum itself is designed by someone with that skill set. The same goes with delivery.

You'll want to think about who your best trainers are. Maybe they're your board president and chief executive, but maybe not. Have a strong facilitator lead your orientation, with your experts on hand to answer questions as needed.

Don't forget to include development staff as you create content for onboarding and at the live sessions themselves. Positive working relationships between fundraisers and board members are critical and should be developed early.

Do you have at least one renewing board member who embraces fundraising and can be a positive example? Have these board members be part of orientation so they can share their experiences with fundraising. Hearing how a peer was able to engage in fundraising is much more motivating for board members than being told what to do by development staff.

The Job Of Fundraising

Once you've determined what your onboarding process will look like and who will be involved, you can then develop content that will support productive board engagement in fundraising.

For example, do you have a job description for board members? This isn't all about fundraising—it's also a great opportunity to cover attendance, governance, and participation. This job description should be shared during the recruitment process, but make sure it's covered again during orientation. Then, have board members sign off on the job description as you would with other volunteers or paid staff.

Whether or not your organization has specific board giving expectations, make sure it's made clear to new board members how fundraising works at your organization. Is there a minimum expected gift? What counts toward board giving? How will board members be solicited?

Then, so new board members can understand how fundraising works at your organization, share your development plan with them as part of the onboarding process. Also be sure to cover fundraising policies and procedures. Board members should be familiar with the basics of your gift acceptance policy as well as your donor recognition policies.

Particularly if board members are in the position to solicit gifts, make sure they know what gifts are not a fit for your organization and limitations on what naming opportunities or sponsorship benefits you can offer, for example. Be sure to include AFP's Code of Ethical Conduct or a similar resource so board members are introduced to fundraising ethics.

For board members coming from outside the fundraising profession, there can often be confusion about what fundraising entails. Many times, the misconception is that fundraising is all about the ask. The thought of asking for money—whether it's from one of their connections or a stranger—can terrify most board members. Help assuage this fear by making clear to board members that you will not send them alone on cold solicitations. Emphasize how staff support the board's fundraising efforts and highlight how fundraising is a cycle with multiple steps where everyone can help.

You should also share specific ways your organization is looking for board members to engage in fundraising. Don't leave expectations vague. For example, are you looking for introductions to prospective donors? Clarify what this means if that's the case. It's likely you're not looking for each board member to drop off photocopies of business cards they've collected over the years. Spell out the help you need in identifying and cultivating new donors. If your organization holds special events, clarify what role board members play. Are they expected to be sponsors or secure sponsors? Fill a table with guests? You should also highlight the importance of attending and representing your organization well.

Part of representing your organization well is being knowledgeable about the work. As part of your onboarding process, clarify for board members how to talk about your organization. But don't bog them down with a long history and tons of acronyms. Instead, ensure they speak about your organization and those you serve in appropriate terms. For example, do you serve "patients" or "clients?" Help new board members craft a simple way they can talk about your organization that's meaningful for them and is factually accurate. How can they tell your story authentically?

Through your onboarding process and ongoing education and support, ensure you equip board members with the tools they need to fundraise effectively. Be sure to encourage board members to step outside their comfort zones if necessary to assist with your organization's development efforts. Don't assume board members, even if they come with fundraising experience, are ready to fundraise for your organization without preparation.

If it's been a while since your entire board has learned about fundraising, invite renewing board members to participate in your onboarding process. Depending on how long they have served and how thorough of an orientation they received, they will still gain valuable knowledge and confidence.



Stephanie Cory, CFRE, CAP®, principal, Stephanie Cory Consulting, has dedicated her career to the nonprofit sector for nearly 20 years. Her practice focuses on equipping boards with the tools and skills they need to govern and fundraise effectively. She is a BoardSource Licensed Governance Consultant and earned an M.Ed. in adult and organizational development.

Read More

09 May 2023 Member Story

[AFP Member Spotlight: Alicia Copley, CFRE \(/news/afp-member-spotlight-alicia-copley-cfre\)](#)

08 May 2023 President's Perspective Blog

[Mike's Message Takeover: Addressing the STIGMA Associated with Mental Illness \(/news/mikes-message-takeover-addressing-stigma-associated-mental-illness\)](#)

Ian Adair, Director of Leadership Development and Credentialing

01 May 2023 Member Story

[Featured Fundraiser: The Mental Load of Motherhood | An Interview with Vanessa Seltzer \(/news/featured-fundraiser-mental-load-motherhood-interview-vanessa-seltzer\)](#)



In Challenging Times,
Invest in Yourself

Be a CFRE



In Challenging Times,
Invest in Yourself

Be a CFRE



<https://www.cfre.org/commit-excel-lead-be-a-cfre/?>

[utm_source=CEL+AFP+Site+May+In+Challenging&utm_medium=CEL+AFP+Site+May+In+Challenging&utm_campaign=CEL-](#)

Paid Advertisement