

Recipe for a Happier Director of Development-to-Board Relationship

Although this article was originally meant to guide directors of development, it also useful for trustees who need to make sure that their director of development is focused on establishing and maintaining the tools and systems necessary for their successful fundraising.

“I wasn’t told I’d have to fundraise.”

“I’m unclear on which prospects and program needs are priorities.”

“My specific strengths and contacts aren’t being utilized.”

“I didn’t join this board to drown in a paper blizzard, get lost in a labyrinth, or be hounded to death!”

As fundraising counsel, I’m used to such exclamations by board members complaining of too much material, too little guidance, and too many demands. These and other board complaints must be vigorously addressed by development directors who want their boards to participate effectively in fundraising. I’ve seen board members who hated fundraising become active fundraising enthusiasts as a result of a development director’s determination to enlist their goodwill and support.

Here are some suggestions for improving staff/board relationships and avoiding potential problems:

- 1 A development director should be thoroughly versed in an institution’s programs, strengths and fundraising priorities, learning everything possible about prospects, and also about the board members themselves.
- 2 The development office should be set up so that board requests can be attended to immediately. Materials that should be on hand include a case statement with a description of funding needs, a list of major donors and current prospects, select prospect profiles, strategy papers for each project and naming opportunities.
- 3 Development committee members should have job descriptions, timetables and agendas, so that board members know exactly what is expected of them and by when. Plenty of advance notice will help board members on the committee be more motivated to complete their solicitation assignments.
- 4 Directors of development should be at least as organized as they expect others to be. Before calling or meeting in person with a board member, they should rehearse what they plan to say.

Directors of development should also take every opportunity to gain the CEO’s confidence so that they might be trusted to handle most fundraising issues with the board directly. The closer the relationship between director of development and CEO, the easier it will be to improve communication between all parties.

It's the development director's job to know how the board views fundraising and feels about his or her department, so that problems in relationships between the director and the board may be avoided, keeping the focus on successful fundraising. The CEO as well as board members can be a valuable source of feedback and assistance in the following areas:

Understanding that the Board is responsible for fundraising.

- 1 Directors of development can help ensure that potential board members are well-suited to fundraising by developing an outline of desired characteristics, drawing up a list of candidates and mapping out strategies for enlisting them.
- 2 All too often, board members are recruited without a job description and with little or no explanation of their fundraising duties and the time commitment required to execute them. Boards are primarily and ultimately responsible for any fundraising they authorize, and the CEO should communicate this clearly to them. Supplementing what is verbally communicated to board members with job descriptions, gift expectations, timetables and agendas, will help to further improve trustees' understanding of their responsibilities.
- 3 The CEO can suggest that the board establish a self-evaluation program to ensure a high performance standard, including full participation in fundraising.
- 4 The board should know exactly what to expect from development staff, and their requests should receive prompt attention.

Board members should be absolutely clear on the institution's mission, on its fundraising priorities and on recent developments and changes in these areas.

- 1 If the institution's mission, objectives, priorities and goals have not been clearly outlined for the board, the director of development should help the CEO to do so. Again, verbal information should be supplemented with the written materials prepared by the development office.
- 2 Board members might have difficulty articulating their institution's mission in a simple paragraph or two. This can be offset by the development staff fine-tuning a summary script of the institution's case for board members to use in informal correspondence with prospects and for verbal presentations.
- 3 Considering the fact that most board members have pressing priorities elsewhere, and many miss board meetings, their knowledge and understanding of the organization and its programs should not be taken for granted. Directors of development should make sure each board member understands the purpose of his or her organization.

Board members should not feel that their time, talents and contacts are being wasted.

- 1 One of the most common board complaints is that of being overburdened

- with requests. Directors of development should carefully consider and prioritize requests before presenting them to the board. For example, a board member should not be unduly pressed to simultaneously undertake more solicitations than he or she finds reasonable.
- 2 Another frequent board complaint is that of being misused. A good director of development will identify the specific interests and talents of each board member, and, if possible, have members head fund drives for their favorite program areas, where they will often make the lead gift.
 - 3 As an institution grows and acquires more professional staff, board members who previously took charge of certain areas may suddenly feel superfluous. Their energies must be carefully and quickly channeled before their enthusiasm and commitment wane.

Board members should feel confident and enthusiastic when soliciting prospects.

- 1 If a board is reluctant to fund raise, the director of development should find out why. Ferreting out board members' unspoken feelings and fears of soliciting is crucial, since these can often be successfully addressed and reversed.
- 2 The board should be prepared for obstacles they may encounter in fundraising, perhaps by participating in a role-playing "Solicitor Training Workshop"; this will prepare them for situations they are likely to encounter when soliciting a gift.
- 3 Surprise can lead to embarrassment, so before asking a board member to approach a prospect, a good director of development will go over the "pitch" so that any knowledge gaps or stumbling points can be addressed fully prior to the actual solicitation

The board should feel involved and valued.

- 1 The board should be involved in feasibility studies, prospecting sessions and in defining and reviewing the case statement. Their participation in these fundamental activities will increase their understanding of and commitment to the institution's mission and success.
- 2 At board retreats, each board member should be encouraged to contribute his or her expertise to help reach development-related decisions. This will give them a sense of "ownership" concerning these issues and programs and will help them know their ideas are valued.
- 3 New board members who haven't taken part in establishing programs and policies should be oriented and involved as soon as possible.
- 4 The development office should draw up a list of tips on how the board can be useful at events and educational programs.
- 5 Department heads can give your board members regular tours of projects they are fundraising for so that they can see what their efforts have achieved.
- 6 A safe rule of thumb is to assume board members can't be thanked enough. They need continuous positive feedback on how their contributions are valued. One-to-one meetings between the director of

- development and the board chair and/or CEO and public acknowledgement of their support on special occasions and in publications – are all good vehicles for expressing appreciation.
- 7 Each board member's personal needs should always be considered. For example, development staff should make sure board members can easily get to and from locations they are asked to attend. Or, even better, meetings should take place at a location of the member's choosing.

A good director of development will never forget that board members are human and that people give or serve because they want to make a positive contribution. They should be given year-round attention, helped to cultivate a sense of ownership in the institution and thanked at every opportunity for their support.