



Board & Staff Consensus: A Powerful Fundraising Tool

Is every one of your board and staff members 100% committed to fundraising? To be sure they are, you need to prepare the right documents.

BY WILLIAM F. VARTORELLA



Increasingly, nonprofit boards are establishing guidelines to make executive directors and staff more ac-

countable for fundraising. Too often, however, they ignore the implications of these actions on board fundraising and general morale.

You can solve this problem and assure that all staff and board members are committed to fundraising. To do so, you need to draft, discuss, and adopt strong position papers in which board and staff *share* ownership of the fundraising role. These are the documents you need:

1 *A Handbook of Fundraising Definitions*

First, prepare a simple board and staff handbook that explains critical development terminology, such as “capital campaigns,” “planned giving,” “matching and challenge grants,” “donor recognition programs,” “100% participation,” “flat lists,” and so on. Along with the definitions, describe how each term relates to your mission statement. Too often, confusion over what constitutes,

for example, a capital campaign or a lead gift creates undue stress over largely “definitional differences.” Squelch them.

2 *A Board Compact*

Have board members prepare and sign a fundraising “compact.” This document should state unequivocally that board membership carries the responsibility of “100%” board participation” in terms of annual giving, *as well as* a commitment to fundraising.

3 *A Staff Compact*

In addition to the board compact, you need an agreement drafted and signed by staff members. Like its companion document, it should indicate staff members’ 100% participation in annual giving *and* general fundraising. Staff and board members can use these two documents as strong arguments whenever they raise funds. (“Won’t you join me in giving X \$s to Y nonprofit?”)

4 *A Board Resolution*

You also need a signed board resolution, published in the board’s official

minutes. This resolution should state that the board “unanimously endorses efforts by the staff, executive director, and board members to solicit grants from foundations, corporations, and other entities to underwrite specific projects and capital needs.” Such a resolution is an extremely powerful tool, especially with global businesses (such as Japanese companies) who expect team-building and consensus in decision-making.

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CREATIVE FUNDRAISING IDEAS

Play Trivial Pursuit

Arrange a giant "Trivial Pursuit" competition, such as the "Geography Bowl" hosted by Court Appointed Special Advocates (CASA). East Texas CASA cleared over \$2,000 on the event, according to executive director Joann Powell. A table of eight (which included lunch, door prize tickets, and a two-person team) cost \$150. About 26 two-person teams competed at the event, which was hosted by local radio personalities. For more information, contact Texas CASA, Inc., 800 Brazos, Suite 710, Austin, Texas 78701 (phone 800-770-8042 or 512-473-2627).

Help People Shop at Home

Give people a new at-home shopping experience, and reap the benefits each time they shop. When you sign people up for the video shopping network, your organization receives \$10 of their \$25 subscription, plus up to 20% of anything they buy during subsequent shopping "trips." Their \$25 fee buys them four videotapes a year with 18 stores per video—a virtual-reality trip to the mall. For more information, contact: VHS Network, 15 Century Blvd., Suite 103, Nashville, Tennessee 37214-3692 (phone 800-729-1301 or 512-404-2300; 24-hour fax-on-demand 512-703-6102).

5

An Annual Review Policy

Next, create a policy affirming that you will evaluate your fundraising efforts at least once a year. This assessment should analyze how individual board members and the executive direc-

Have board members prepare and sign a fundraising "compact."

tor are doing in terms of attracting funding. Components should include individual pledge forms (100% participation), targeted donors, and a time and task schedule—all within the context of annual goals and long-range development needs. Such a review defuses from Day 1 the often-heard comment from board members, "Sure, I'll serve as long as I don't have to raise money!"

6

A Case Statement

You need a strong, specific case for support. This case statement should be endorsed by the board and implemented by a long-term planning committee. The

planning committee should be made up of key board members, the executive director, and staff (representing special events, programming, and so on). Such a joint management-staff venture not only keeps fundraising focused, but it offers a much-needed "venting" mechanism for staff and board to raise concerns and to evaluate programs.

7

A Mission Statement

Be sure you have a vibrant mission statement, reviewed annually by both board and staff. Most mission statements suffer from still-birth. Staff input is critical to keep the mission out of the Ivory Tower and closer to the client base.

8

A Non-Interference Policy

A "non-interference policy" states that board members and staff will work through established channels in their dealing with each other, especially regarding fundraising issues. A clear chain of command averts staff morale problems and works wonders when grant deadlines loom or capital campaigns are under way. Keeping the "raging bull" board member under control is, unfortunately, considered "Job 1" with all too many boards and staffs. Having a

clear, written non-interference policy will take care of the problem.

Put It in Writing

"Cooperation" may not lead overnight to "consensus." But once board and staff members begin working together to raise funds, you have taken an important step. Gain their commitment in writing, and you are well on

Define fundraising terms and explain how each one relates to your mission statement.

your way to board and staff consensus—the most powerful fundraising tool you can have. ■

Selected References

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Events.

Harrison, Bill, "Should Your CEO Be Involved in Fundraising?", *Nonprofit World*, July–August 1996.

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Krit, Robert L., *The Fund-Raising Handbook*.

Ladner, Susan and Susan Zimny, "Fundraising With Your Board: Making It Work," *Nonprofit World*, November–December 1995.

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Muehrcke, Jill, ed., *Fundraising and Resource Development, Leadership Series*.

New, Anne L., *Raise More Money for Your Nonprofit Organization*.

Nichols, Judith, *Changing Demographics: Fund Raising in the 1990s*.

Seltzer, Michael, *Securing Your Organization's Future*.

Audio and Video Cassettes

Cultivating & Soliciting Major Donors. Video tape. Presented by Henry Goldstein.

Corporate Solicitation. Video tape.

John Carver on Board Governance. Two video tapes. Presented by John Carver.

Speaking of Money: A Guide to Fundraising for Nonprofit Board Members. Video tape.

Special Events Fundraising. Video tape.

Strategic Leadership. Audio tapes. Presented

by John Carver.

Above resources are available through the Society's *Resource Center Catalog* (see page 25).

Fundraising Software Resources

Auction Maestro Software, MaestroSoft, Inc., 13215 S.E. 46th Street, Bellevue, Washington 98006 (phone 800-438-6498 or 206-881-9305; fax 206-867-1138).

Chronicle Guide to Grants, 1255 23rd Street, N.W., Suite 700, Washington, D.C. 20037 (202-466-1000).

Donor Perfect fundraising software, SofterWare, 540 Pennsylvania Avenue, 2nd Floor, Fort Washington, Pennsylvania 19117 (800-220-8111).

Enterprise fundraising software, Access International, 432 Columbia Street, Cambridge, Massachusetts 02141 (phone 617-494-0066; fax 617-494-8404).

Executive Data Fundraising, Executive Data Systems, Inc., 1640 Powers Ferry Road, Building 27, Marietta, Georgia 30067 (phone 800-272-3374; fax 770-955-3374).

Federal Money Retriever, access to all Federal Assistance Programs, IDI Magic Technologies Corporation, available through the Society for Nonprofit Organizations' *Resource Center Catalog*, 6314 Odana Road, Madison, Wisconsin 53719

(phone 800-424-7367; fax 608-274-9978).

Fund-Master 7.0 fundraising software, Master Software Corporation, 5975 Castle Creek Parkway N. Drive, Suite 300, Indianapolis, Indiana 46250 (phone 800-950-2999; fax 317-849-5280).

Manage!, Omega C.G. Limited, 377 East Butterfield Road, Suite 975, Lombard, Illinois 60148 (phone 800-443-3481; fax 708-969-8690).

ParaGon planned giving software, Blackbaud, 4401 Belle Oaks Drive, Charleston, South Carolina 29405-8530 (phone 800-443-9441, Ext. 307 or 803-740-5400; fax 803-740-5410).

Planned Giving Manager (PGM) software, PG Calc Incorporated, 129 Mount Auburn Street, Cambridge, Massachusetts 02138 (phone 617-497-4970; fax 617-497-4974).

The Raiser's Edge fundraising software, Blackbaud, 4401 Belle Oaks Drive, Charleston, South Carolina 29405-8530 (phone 800-443-9441, Ext. 307 or 803-740-5400; fax 803-740-5410).

Special Events software, Lifeline Information Services, 1776 Woodbine Place, Oceanside, California 92054.

TARGET 1 Fundraising software, Echo Management Group, 1620 Main Street, Center Conway, New Hampshire 03813 (phone 800-635-8209; fax 603-447-2037).