

# How to Run the Perfect Board Meeting – While Inspiring Board Members to Raise Funds

Inspire your board to raise money by holding irresistible board meetings.

By Susan Howlett

**M**ost board meetings are disappointing. The main reason? The typical meeting structure offers little opportunity for board members to *lead*. Picture a conference room full of people with skills, talents, contacts, wisdom, experience, and passion for the mission — relegated to listening to a series of boring reports that aren't tied to a common vision or strategic goals. Fundraising is always the last item on the agenda, and it gets abbreviated or postponed because the other items took too long. Instead of steering the meeting, leaders are furtively checking their messages.

There are many reasons why board meetings have ended up looking like this. One might be that strong executives don't really want their boards very engaged, because they've been burned by micromanagers in the past or they fear that a fired-up board might usurp some of their power.

Mostly, though, boring meetings are the result of benign neglect: Whoever wants time on the agenda gets it and there's no overarching rationale for what the board spends its precious time on across the arc of a year.

One thing is for sure, though: No one wants to go out and raise money to fund committee reports. If you want board members to become eager fundraisers, you need to transform your board meetings.

The antidote to this problem is easy: Create an environment where board members get to lead.

## Overcome the Governance Barrier

In their book *Governance as Leadership: Reframing the Work of Nonprofit Boards*, authors Dick Chait, Bill Ryan, and Barbara Taylor distinguish three modes in which boards



operate: the *fiduciary* mode, the *strategic* mode, and the *generative* mode.

When operating in the fiduciary mode, boards discuss things like budgets, contracts, and legal responsibilities. In the strategic mode, they discuss goals, outcomes, the relative merits of a collaboration, or what position to take on a legislative matter. When they're in the generative mode, they temporarily suspend those other two modes and think outside the box about how to address a systemic issue.

When boards operate in the fiduciary mode, their heads are down, their pencils are out, and they're looking at fine print, maybe even squinting. In the strategic mode, they're sitting upright in their chairs, looking at one another. And when they get to the generative mode, they're leaning back in their chairs with their hands behind their heads, saying, "What would happen if we thought about it *this* way?" Their view is beyond the room's walls, and the conversation is animated and engrossing.

If we created more opportunities for boards to have generative conversations, they would find the strategic conversations more contextual and satisfying, and they would lean into the fiduciary conversations eagerly because the financial and legal topics would feel vital to accomplishing the big ideas they created up front. Fundraising then becomes a natural step in the process of achieving the vision they "birthed" in a generative conversation.

## Design Meetings People Look Forward to Attending

Here's how to shift the content of your board meetings so leadership can emerge naturally. Imagine a board meeting with an agenda that unfolds like this:

- an opportunity to build community among the board members
- an inspiring reminder of the organization's mission
- a vote on a "consent agenda"
- an opportunity for education or training of board members
- a generative conversation about a matter of consequence.

Let's look at these steps in more detail.

### 1. BUILD COMMUNITY

Building community increases accountability. When people don't know or care about the others in the group, they don't

“Maybe the exec doesn't really want an engaged board.”

“No one wants to raise money to fund committee reports.”

feel bad about dropping the ball on their assignments. But people who feel emotionally connected to one another follow through because they don't want to disappoint their peers. Here are some ways to build community:

**Food.** Every board meeting should have food, partly as a gesture of reciprocity because the leaders are volunteering their time, and partly to ensure that people's biological needs are met so they can pay attention. Also, something visceral happens when people break bread together. Some groups rotate the food assignment among board members; others assign food to staff.

**Introductions.** Begin by asking people to restate their name and share a simple fact about themselves: their favorite movie, their favorite book, their favorite ethnic restaurant, a memorable trip, or where they went to high school. Or ask them something more mission-related, such as their favorite book (literacy), their favorite historic building (preservation), and so on, linking the question to your organization's mission. These brief introductions give a glimpse into each leader's personal life without taking time out of the meeting.

### 2. REMIND PEOPLE OF THE MISSION

To keep people inspired, it's important to remind them of the group's mission at every meeting. In some organizations, a staff member shares a story about someone who has benefited from the organization's work. Even more effective is to have a board member be responsible for the "mission moment." Rotate who shares one of these moments each month (and be sure to make it easy for them to connect with an end user of the organization's services so they'll have good stories to tell). Crafting a story and sharing it with their peers will help them remember it for a long time. At the end of the year, they will have heard enough stories that they'll feel really connected to your mission.

### 3. USE A CONSENT AGENDA

With a consent agenda, the staff puts into one document all of the reports and routine items that normally take up meeting time yet don't require board discussion (for example, the CEO's report, finance report, committee reports, or perfunctory ratifications). Board members receive this document ahead of time with the expectation that they'll read it before the meeting. Then all items are voted on at once, becoming the official record of the organization.

A consent agenda eliminates from the agenda anything that already happened and allows the board to spend the

meeting time looking forward and applying their wisdom to important matters.

## 4. OFFER EDUCATION & TRAINING

Include 20 minutes of education or training so board members can anticipate learning something germane every time they attend a meeting. Knowing that the organization is investing in their ability to lead will inspire them to use their newly acquired wisdom and skills. Here are a couple of points to remember:

- Think about **education** in terms of your line of work. Have a staff member or local expert come in to talk about trends or best practices in the field. Invite a board member who knows a lot about something (the legislature, collaboration, a sister organization they used to lead) to share their expertise. Education helps put your work in a larger context so the board can see how your organization fits into the broader community.
- Think about **training** in terms of how to be a more effective board member. If no one knows how to read the financial statements, train them on where their eyes should fall on the page and which strategic questions they should be asking. If they don't know how to work a room on your behalf or ask unapologetically for money or auction items, have someone show them how to do it. We need to stop complaining about what leaders do badly and give them the tools to do it better.

## 5. SPEND MOST OF THE MEETING IN DEEP, SATISFYING CONVERSATION

Imagine that those first four agenda items take 30 minutes total. That leaves you a good 60 minutes to engage in rich, meaningful conversation about something that matters,



“Every board meeting should have food.”

preferably something that relates to your strategic goals. Perhaps a task force went away after the strategic planning retreat to hammer out a recommendation on some topic. Give them a few minutes to outline their ideas and then open it up for the whole board to discuss.

## Connect the Board's Fundraising to Larger Goals

Good board meetings help leaders feel as if the organization has invested in them and they've invested in the organization. As meetings engage board members in important conversations about topics that further the mission, vision, and strategic goals, trustees can see how their efforts to raise money affect the organization. When board members are engaged in authentic leadership, they'll be eager to ask for financial support. 

---

*Susan Howlett (susan@susanhewlett.com) is the author of Getting Funded: The Complete Guide to Writing Grant Proposals and Boards on Fire! Inspiring Leaders to Raise Money Joyfully, from which this article is adapted. Susan's consulting has helped thousands of groups clarify their missions and goals, create plans, and raise money from every type of source – joyfully! She offers simple, low-cost solutions that are easy to implement with the resources you have on hand. And she always brings chocolate.*

## More on Boards, Meetings, Training, & Fundraising (NonprofitWorld.org)

**Board Problems Reflected in Training Requests** (Vol. 33, No. 1)

**Success through Engaged High-Level Board Members** (Vol. 34, No. 1)

**Action Steps for Effective Governance: Test Yourself** (Vol. 35, No. 3)

**Training Programs Need More than Good Information** (Vol. 21, No. 2)

**Make Your Meetings Productive** (Vol. 25, No. 1)

**How Your Board Members Can Raise Funds without Asking for a Dime** (Vol. 19, No. 6)

Also see Learning Institute programs on-line: Board Governance ([snpo.org/li](http://snpo.org/li)).