

What is the Role of the Board of Trustees in Fundraising?

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It is known fact that the role of the board of trustees is one of the most argued issues in the charity sector, including Christian ones. In reality, far too many trustees simply do not have the proper understanding of what is expected of them. And, too few are able to see beyond the surface issues of "oversight and approval" to the critical role they should play in the fundraising functions of the organisation they serve.

Beyond the collective activities of the board, every individual member can play a significant role to ensure that the organisation they serve raises sufficient resources to fulfil its strategic mission.

Here is an outline of the 10 most significant things trustees can do to strengthen the effectiveness of fundraising activities in the organisation they serve:

- Prayer
- Personal giving
- Referrals of friends and/or colleagues
- Influence / Advocacy
- Donor Visitation / Cultivation
- Personal solicitation
- Public relations
- Recruitment of new trustees
- Support for and involvement in capital campaigns and fundraising activities
- Coordination with staff and adherence to fundraising plans and priorities

This list could certainly be expanded by adding specific types of activities in which trustees could engage in, such as hosting luncheons or dinners for prospective donors, and the like. Such specifics activities are only limited by the creativity and imagination of each trustee and the fundraising staff.

However, of these ten categories mentioned above, I believe that five represent critical activities that each board member must pursue to ensure the health and well-being of the organisation.

In fact, I strongly recommend that these five be included as part of the general 'job description' for every trustee -- and that boards regularly evaluate performance against specific objectives in these areas:

The 5 critical activities board members must do:

1. Recruitment of new trustees
2. Referrals
3. Influence / Advocacy
4. Donor Visitation / Appreciation
5. Personal solicitation

To sum up, these five critical activities can radically improve the performance of any charity's fundraising programme. Here is why:

Recruitment focuses on bringing onto the board individuals with the needed qualifications to serve as effective trustees. While most boards do not experience continuous turnover, many are in regular need of individuals with specific skills (e.g. marketing, IT, church leadership, youth culture, etc) to serve. Effective recruitment is the most significant activity to ensure the long-term health the organisation!

Referrals provide a continuing source of new prospects for cultivation as donors. It is easiest to think of the referral process as simply opening up one's "circle of influence" to leadership and staff of the organisation, as well as finding and gaining entry into new "circles" or business and social networks within which the organisation and its staff can be introduced.

Influence / Advocacy. This function is simply representing the organisation within local and national communities, in churches or with individuals. Serving as an advocate for the cause is a long standing and noble tradition. But, it requires up to date information about the latest programmes and developments within the charity and continuous training. It takes initiative and being proactive in order to succeed. This function also requires coordination with the communications and fundraising staff in order to ensure that priorities are understood and represented properly.

Donor Visitation / Appreciation this represents the most important of these critical fundraising functions. As a trustee, an individual represents a significant, credible witness that the organisation is achieving its mission and is worthy of support. What better evidence can a donor want than a satisfied, engaged and enthusiastically involved trustee?

Personal Solicitation is an activity that frightens most individuals. And the reality is that participating in meetings with major donors as a member of a calling team requires a degree of personal risk - and it provides valuable training experience for those individuals who can serve their organisations in this critical function.

Engaging donors and challenging them to participate in projects and programmes one truly believes in can be a deeply satisfying pursuit. So can cliff diving. But most individuals wouldn't voluntarily choose to be involved! Involving board members in personal solicitation requires careful training and the provision of rewarding experiences that will encourage their continuing involvement.

Effective boards are so because they consist of individuals who are committed to their task. The difference between effective and ineffective boards often boils down to an understanding of what truly comprises that task. Unless a board is supportive of and involved in the fundraising function of their organisation, neither they nor the organisation can be truly effective in the work for which they exist.