



## **Major Giving Begins with Your Board!**

By  
Robert Stein, CFRE

### **An Early Commitment Stimulates Community Giving.**

Nothing arms a major giving effort better than having an early, generous commitment from the board. It communicates the leadership is committed to institutional success and the value of philanthropy. As an ongoing practice, once it becomes enculturated, early board giving establishes a standard that leaves little doubt about the expectations of board members. At the early stage there might be some board attrition, but often this is because these board members never felt fully committed to the institution.

### **A Board Goal Helps to Balance Diversity of Income within the Board.**

Every board needs representatives from a variety of constituencies being served by the institution. This obviously includes racial, ethnic and gender diversity, but a board is also enriched by professional diversity. For example, if your nonprofit serves pre-school children, then a board representative from a child services agency can provide valuable advocacy and perspective. Similarly, an educator should always be part of the mix of a balanced community nonprofit board.

By establishing a board goal, one that is both dollar and percentage based, you are able to take into account the different financial capacities of your board members. More affluent ones should be able to balance the more limited financial capacities of other board members.

### **Board Visits Should be Well-Planned and Should Team the CEO with the Board Chair.**

This annual practice is time-consuming, but it also sets the pace for all board activity and provides the donor/board member with the courtesy that should be accorded all donors—a respectful face-to-face meeting. There is no harm in telescoping your intention of asking for money in advance of the meeting, but it is equally important to say that the meeting is an opportunity for each board member to ask questions, comment and offer insights that he or she might feel constrained to do within a board meeting. Because the primary purpose of the meeting is to make a request for money, any contentious issues should be tabled for a follow-up conversation.



### **Calculate Your Goal and Make it Attainable.**

Suppose your board is comprised of 20 members and their total giving is \$50,000. Analyze each board member's gift potential and structure the campaign on the basis of reasonable giving growth for each person. One board member might be able to jump from \$5,000 to \$10,000, while another might find it a stretch to go from \$250 to \$360.

*Once you have made your calculation, set a percentage goal that is slightly less than the projected dollar goal, as you want to be sure that you can declare victory.*

### **Rehearse Your Key Talking Points.**

Ease of communication and an obviously strong rapport are essential to communicating effectively with your board. Make sure you are clear in your objectives and draft talking points for each visit. Base your approach on who has the stronger relationship with a particular donor, and let that person take the lead.

### **Fine Tuning**

This approach will take training, practice and fine tuning. It is most successful when it becomes a codified agreement between the board chair and the CEO, and after several years, your board will no longer consider it novel, but, rather, a standard operating procedure that facilitates a better and more open exchange between the board and its leadership and the management of your nonprofit.