
Contracts with Board Members: A Working Model

By OCTAVIA MORGAN

Herding cats doesn't begin to describe what it can be like to coordinate board fundraising. To me, it often feels like trying to simultaneously herd cats, birds, and fish toward the same corral, all of them moving at different speeds and with varying levels of interest and motivation. On any given nonprofit board of directors, you might find people with no experience in fundraising and people who do it for a living. Some board members will have lots of time, others are extremely busy. During the five years that I served as the Development Director for the International Gay and Lesbian Human Rights Commission (IGLHRC), the organization used three strategies to successfully maintain 100% board-member participation in fundraising.

1. THE PLEDGE FORM

The pledge form was my opportunity to get a specific and concrete commitment from board members. I developed the form with the executive director and some members of the board. The form evolved from a very simple document with one blank for a personal giving pledge to the more complex version shown here. We altered the form over time for two main reasons: to show the full range of the types of contributions board members could make and to concertize their annual commitments.

The form was designed to assist board members in thinking carefully and realistically about the various commitments they could make to the organization during the year. I encouraged people to promise only what they could really do and not to be overambitious. I found it to be essential to have people sign and date the form to reinforce the seriousness of their commitment.

The version of the form shown here reflects one of the most important things I learned — to have full board participation in fundraising there must be a range of ways for people to participate. Board members have vastly different levels of expertise and interest, and the time they have to do fundraising varies from year to year as their lives change. Some people will do a great job with getting friends to attend a house party, others are savvy about ask-

ing for major gifts. If board members self-select the types of fundraising that they feel they can do, they are more likely to keep their promises.

2. A SUPPORTIVE ENVIRONMENT

An atmosphere on the board that supports fundraising is just as important as having a good pledge form. When people joined the IGLHRC board, they acknowledged in writing that they understood that one of their duties was fundraising. The pledge forms were filled out during the first board meeting of the fiscal year and at this time the board co-chairs would encourage everyone to push themselves in both raising and giving funds. We made an effort to conduct fundraising trainings about once a year during board meetings, and sometimes we held discussions where people could speak about the successes and pitfalls of their fundraising efforts. The leaders of the board talked openly about their own pledges and gave other members verbal encouragement throughout the year. Board members who were less experienced in fundraising could choose to pair with a more experienced person to learn how to do donor solicitations.

As the development director, I tried to provide as much logistical support as I could for board fundraising. This included providing template letters for those who were soliciting funds from their friends and colleagues by mail, doing the actual mailing if they didn't have time, and coordinating most of the logistics of house parties they were hosting (creating and mailing invitations, setting up a host committee, etc.). I also developed handouts on how to write a fundraising letter, how to give a pitch at a house party, and how to solicit donors verbally. At the beginning of each fiscal year, the development department would update the Frequently Asked Questions document so that board members would always have fresh information about the organization's work at their fingertips. If there were particular themes that we wanted to emphasize in fundraising during a certain time, we would also put those in writing.

3. FOLLOW-UP

Even those who make promises with the best of intentions sometimes require nudging to fulfill them. While board members' individual pledges were confidential, I made a written and verbal report at each board meeting that detailed progress made toward the board's total giving and raising goals. At the meetings, I found it useful to give members a copy of their own pledge form, since there were always some people who would forget the commitments they had made. I would encourage board members to specify exactly when they planned to do their fundraising activities and would do my best to start nudging them by e-mail and phone in the months and weeks prior to that time to give them enough time to prepare and plan properly. Finally, each

person on the board development committee was assigned a few board members with whom they kept in regular touch throughout the year. This connection was designed both to remind board members of the work they had pledged to do and to support them in their fundraising efforts.

In the end, what really matters is that each member of the board is participating in fundraising in some way, both by donating money themselves and by asking others for money. As the coordinator of board fundraising, my goals were to help board members stretch themselves as fundraisers and as donors, and to give them concrete tools to make fundraising easier and less intimidating than they might imagine it. The pledge form is an invaluable tool in facilitating successful board fundraising.

Board Pledge Form — Confidential

FISCAL YEAR _____: OCTOBER 1 – SEPTEMBER 30TH

BOARD MEMBER NAME: _____

International Gay and Lesbian Human Rights Commission recognizes the many and diverse contributions and skills that its board members give to the organization, including time, knowledge, connections, staff support, ideas, and perspectives, to name a few. The organization encourages creative forms of contributions and sees them as essential to its growth and health. In addition, IGLHRC recognizes the importance of board participation in fundraising.

My commitment to IGLHRC consists of the following pledge:

1) PERSONAL GIFT — Board members may make a personal gift to IGLHRC by being on the host committee for one of our two major events and/or by giving separate from these events.

I will personally donate \$ _____ in the following installments: monthly quarterly yearly

I pledge \$ _____ to be on the host committee for the annual fundraising event to be held in June.
(The minimum host committee pledge for last year was \$500.)

I pledge \$ _____ to be on the host committee for the annual fundraising event in September. (The minimum host committee pledge for last year was \$100.)

TOTAL personal pledge: \$ _____ (sum of three amounts above)

2) RAISING MONEY— My goal is to raise \$ _____ (beyond my own personal donation) in the following ways:

Please note: This pledge means that you actually ask the donor or funder for the money, or that you actively lobby for the money. If you introduced IGLHRC to a source of money in the past but are no longer involved in asking or lobbying for the funds, please do not include this source.

House Party

I will host a fundraising party at my home. I will organize such a party at someone else's home.

Month(s) in which I would like to do the party: _____ City _____

Donor Solicitation — Existing Donors

I will visit donors to ask them for a gift. Number of visits I will make _____

I will make visits in the following geographical area(s). (Will you be traveling this year? Use other side if necessary)

If possible, I would like to do one or two visits with an experienced solicitor.

I will call _____ (number) existing donors to ask them to renew their pledge.

I understand that I may need to call each donor several times in an attempt to have a conversation with them.

continued

Donor Solicitation—New Donors

My goal is to bring in _____ new donors. I will solicit people I know personally who are not already IGLHRC donors.

Names of people I'd like to solicit: _____

I will solicit these people through: a personal letter meetings calls

I have access to the following prospective lists to which the organization could possibly do a mailing (such as clubs, spiritual groups, subscribers to publications): _____

Foundation Contacts

I will write letters of support to foundations where I have contacts. I will meet with foundations officers I know.

My contacts at foundations include the following: (please list even if you think we already know) _____

Corporate Contacts

I have contacts with the following corporations: _____

3) IN-KIND DONATIONS — I will make the following in-kind donations (frequent flyer miles are very useful if you have them):

4) ASSISTING WITH MAJOR EVENTS — I would like to be involved in one of IGLHRC's major events. I'm interested in the following event(s):

Felipa de Souza Awards, June, New York City Celebration of Courage, September, San Francisco

I'm interested in getting involved by:

Serving on the planning committee Soliciting corporate sponsors Helping with set-up the day of the event

Recruiting host committee members Other: _____

5) COMMITTEE WORK — I will serve on the following committees:

Standing: Nominations Development/Visibility Research and Advocacy Executive

Ad Hoc: Retreat Planning Committee

6) TRAINING

I am interested in offering trainings to the board and/or staff in the following area(s): _____

I am interesting in participating in training in the following area(s): _____

7) MEDIA WORK AND CONTACTS

I know mainstream, GLBT, or other alternative press reporters, editors, or producers whom I would be willing to contact to place IGLHRC stories.

I have academic contacts who might be helpful placing stories for IGLHRC.

I am willing to write letters to the editor for IGLHRC in conjunction with staff.

I am willing to write an article (500 words) for IGLHRC's newsletter.

8) PROGRAM SUPPORT / CONTACTS — I will offer my expertise and/or contacts to IGLHRC staff in the following areas (including expertise with particular countries or issues, language skills, writing an article for the newsletter, etc.):

9) OTHER — I would like also to contribute to and/or benefit from IGLHRC in the following way(s):

SIGNATURE: _____

DATE: _____

These commitments will be reviewed during the fiscal year with the Board Co-Chairs or the Chair of the Development and Visibility Committee