



JGA Presidents Alert
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Developing Trustees as Fundraisers:

How Presidents Can Help Trustees Build Passion and Support for Your Mission

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Trusteeship is a covenant. As the name suggests, trustees are *entrusted* with the future of an organization and its sustained ability to carry out its mission. With the challenges - and opportunities - facing institutions today, good trusteeship has never been more important nor promised greater rewards.

Among the many expectations we hold of them, trustees must serve not only as donors themselves, but as models to others for individual giving to support the institution. Early trustee gifting is critical to the success of a campaign. Their support for the campaign is a key indicator when discussing percentage of goal issues with other major donors. And they are uniquely positioned to ask key "due diligence" questions when a campaign is proposed.

One of the toughest aspects for trustees to understand is their individual role in fundraising. It is incredibly powerful when trustees are willing and able to talk with other prospective donors, helping to articulate overarching messages about the institution.

In my experience as a trustee with three institutions, I find it unrealistic to think that every trustee can be an effective solicitor. What is realistic and should be expected, however, is for each member of the board to find their particular way of helping with fundraising.

If they aren't a solicitor, that is fine. Each can, however, be mobilized to help identify donors, to help introduce prospective donors to the institution, or to assist in cultivation of donors. That is a realistic expectation ---- and a best practice to pursue.

And so how do we engage trustees in a manner that helps them succeed for our institutions?

The president plays a key role in engaging trustees for the philanthropic success of the institution. The odds for success can be dramatically increased by providing new board members with education and training about their role in fundraising. The most successful institutions offer an orientation for new trustees that includes:

- creating an environment and culture that supports the open discussion of fundraising;



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- sharing resources on fundraising, such as brief articles or presentations;
- creating opportunities for new trustees to assist in donor identification and cultivation visits, and;
- asking new trustees to practice by discussing the institution with at least two friends or prospects between board meetings.

Trustees are most successful as stewards of the institution when they are deeply involved. Presidents should take the time to learn what motivates each trustee and involve them accordingly.

The president can help trustees build a community of ideas around philanthropy's role in the success of the institution. Presidents can change the "temporal horizon" by which trustee work is considered.

Stories of generosity and of how gifts have transformed a place should be shared as they make philanthropy come alive. These might be stories that go very far back in the history of the institution or they can be very recent.

Through these stories, trustees can see how their work in fundraising becomes a part of a successful historical pattern or tradition for the institution. When they see themselves as part of something which transcends the immediate and becomes part of an important tradition of philanthropy, then everyone, not just trustees, will become a part of a very successful and transformed institution.

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