

Getting the Board on Board

By Kevin Johnson

Actions of your board members will determine your success – or lack of it -- in starting or expanding your planned giving fundraising.

How you involve the board will vary based on factors that reflect the maturity of your board, the nature of your work and mission, age and wealth composition, and the ability of your board president and executive director to carry out a strategic plan with a clearly stated (and inspiring) long term vision.

Start by asking a question: “Why would someone make an estate gift to us?” Sounds simple. Start with yourself. Have you included a charity, any charity, as part of your plans? Why or why not? Asking this question and really exploring the return answers should give you tremendous insight into what you need to do to build a program. Engage a few key board members first. Do this systematically whether it be one-on-one or in small groups, or both. Consider an additional written donor survey.

During this process you will have to de-bunk stereotypes about who makes planned gifts, why people make gifts and what type of organizations are a fit for planned gifts. Remember age and social status differences too. A 55 year old, socialite businessman looks at the fundraising world very differently compared to a loyal donor who happens to be a 75 year old, WWII veteran who owns an apartment building. Many boards include members of stages in life dissimilar to the people who may be your first target market. You will discover many inaccurate beliefs and more than a few will get in your way. Take the time to work through them and don't let them deter you.

Out of this process of inquiry, you are likely to discover what's next for you.

Perhaps someone will emerge as a “board champion” who will quietly but persistently lead the charge encouraging other trustees to make estate plans for charity and keep the issue on the front burner at budget time.

Or, there may be strong potential for this type of fundraising if you choose to undertake a strategic initiative for a specific “big picture” purpose. A systematic campaign may be called for here.

There may be a timely market opportunity with a large group of very loyal donors who are advanced in age.

Or you may find that while people love the work you do, few think of you as important enough to, as one donor put it, “make it into the golden circle.” You are going to have to spend some time to systematically build your case here.

Regardless what direction emerges, the good news is that all those resources large nonprofits spent over the years educating their donors (read “your” donors) about planned gifts did its job. As a result, your planned giving work can focus primarily on why your work is important for today and tomorrow. Now, the challenge for your board is to make the case to themselves and then to your loyal donors that your organization is, and will continue to be, a solid long-term investment.

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