

From Goodwill to Gifts Turning Board Members into Ambassadors

Consider the benefits of setting up your board members in formal roles as Ambassadors for your organization. In these leadership roles, in which members build one-on-one relationships with specific donor prospects, your Board can truly shine!

Remember that cultivating donors is all about focusing on wonderful people who believe in your cause; it is usually lots of friendly fun. You always need more personalized communication with your donors. What a perfect opportunity to engage hesitant board members to not only participate in fundraising, but even enjoy it!

Who would not relish the dignified role of “Ambassador?” As we know, many board members are better suited to handle the courtship and cultivation of potential donors than the actual solicitation. Give them this very important role: helping to develop long-term relationships with potential donors.

Ambassadorship can leverage the energies and talents of your board members and put them to use in an appropriate area where they can do the most good. Board members who are afraid of soliciting can handle “friendraising” and concentrate on encouraging donors’ interest in your organization. This is an essential first step toward a major gift.

This type of role also lets your board members get involved in the creative and fun side of fundraising. Cultivation is all about developing strategies to strengthen relationships with your favorite people: figuring out how to increase a special someone’s involvement, how to bring lost donor friends back to your organization and/or matching up your organization’s needs with your donors’ visions and interests.

Ambassadors as “Relationship Managers”

This approach is based on a well-known for-profit business model of “Account Managers” who manage relationships with key clients. The job of an Account Manager in a business is to nurture a long-term relationship with their client. The Account Managers are not necessarily there to sell more business; they are there to maintain and improve the customer satisfaction and relationship with the company.

Board member Ambassadors can follow this format by becoming “Relationship Managers” for key funders of your organization. Each board member who participates in the project would be assigned one to three major donors, who are either past, current, or potential future donors. Just like in business, their job is to listen to the donor and foster a closer relationship between the donor and the organization.

In this approach, everybody wins:

- The board members win because they finally have a comfortable and highly productive way to promote gifts to their organizations.
- The donors win because they get more attention and personalized communication from an organization they care about.
- The organization wins because it leverages the resources of board members' talents to cultivate long-term relationships with funding sources, ensuring financial stability over time.
- The staff wins because they are receiving help, at the highest volunteer level, in developing deeper and more extensive relationships with important donors.
- The organization's constituency wins because more resources will flow into much needed services.

Customer Relationship Management for Donors

When a board member Ambassador listens to their assigned donor, and takes steps to act on the donor's feedback and interest, they are cultivating a deeper and more extensive relationship between the donor and the organization. This becomes a "donor-centered" approach to cultivating a gift, because the donor's interests guide the whole process. This is fundraising at its best.

This strategy is based on Customer Relationship Management (CRM) techniques used by many for-profit companies. CRM holds that customers—with their needs and wants—should drive business strategy. It holds that businesses should keep focused on their customers above all, watching for and constantly adapting to trends and changes in customer behavior and interests.

Of course, in the nonprofit sector, you do not actually want donors driving your organization's mission just because they are donating. But you do need to know why your donors care about your cause and why they are giving to you instead of another organization. What do our donors want to accomplish through their giving? Why are they giving to you? What is their personal passion? What are their values? We all need to be much more oriented to our donors, just like businesses are to their customers.

Organizations often focus in the wrong direction: on what they need from donors rather than why donors care about their organization. Communication from nonprofits tends to be one-way, often focused too much on money rather than change for the good. In fact, when a nonprofit's gifts level off, it may not be the fundraising program's failings. It may be the organization's strategy and its positioning in front of donors.

It is vital that we listen to our donors. They will tell us what we need to know! We need to be constantly asking them why they are giving and what they want to see our organization doing. Assigning board members to important donors as Ambassadors will help organizations create ongoing consistent communications with them. And our board members can be important earphones out in the community, finding out what is exciting—or unexciting—about our organization's work in the world.

Implementing Ambassadors

When you set up board members to be Ambassadors, make the purpose of the board member's first meeting with the donor a special one: to thank him or her personally and find out exactly why she is giving to your organization. The Ambassador's only charge is to focus on the donor's vision and giving interests.

Give your Ambassadors a set of questions to guide them through their interview. It's a great idea to have your board members systematically collecting vital information about donors, information that you urgently need to know. Best of all, when you start board members with the task of information gathering, it gives them a comfortable framework for the first meetings and a good way to begin developing a personal relationship with the donor.

Ambassadors Are Perfect for Major Gift Programs

Board member Ambassadors can be assigned to all types of potential major donors: individuals, corporate or foundation representatives, or government officials. Their job is to make frequent contact with their prospect. This is the perfect way to help foster a friendly, close relationship that is personal and sincere.

Major gift donors usually start by making small gifts to their organizations. They also want to know more about your organization. There will be plenty more gifts in the future if you create the right kind of relationship. Since these donors already have some level of involvement, they are at a perfect stage to be cultivated by a caring, committed Board member.

Specific Framework for Action

To ensure an Ambassador project's effectiveness, you need a well-structured framework for your board volunteers. Sometimes getting board members to actually do what they say they will can be a challenge. If you set up specific time frames and clear responsibilities, board members will know exactly what they need to do, and when. As busy volunteers, they want and appreciate a precise structure that will support them, spell out clear expectations, and help them to be effective.

Setting Ambassadors Up to Win

Be sure to give your Ambassadors a specific time frame for everything they do. Consider organizing a systematic pattern of monthly contacts, in the tradition of Moves Management, the prospect management system for major gifts.

Moves Management is an organized system to help manage and track activity with your top donor prospects. Moves Management calls for a "move" or some type of personal connection to the donor once a month. For example, one month, your Ambassadors can send a personal note to the donor informing him or her about an upcoming organizational event, another month they can send the newsletter with a personal note, another month they can bring them to a special activity at your organization, another month they can ask them to volunteer with them, etc.

Each activity is a “move” that brings your organization much higher on your donor’s “radar screen” and your prospect closer to making a significant gift. Good fundraising practices hold that getting in touch with an important donor monthly will cultivate that donor quickly and ready them to a major solicitation. This is where you will want to be if you are working towards a major gift. Track the Ambassadors’ activity with their prospects on a monthly basis.

It is the job of the development office to give the Ambassadors suggestions on what to do with their prospects. Don’t leave it up to your board members to figure out an appropriate move. Take charge of their activities by giving them good, well-thought-out opportunities each month to work with their prospects. Your Ambassadors need help defining the cultivation activities they will engage in with their assigned prospects. Above all, they need hand-holding, moral support, coaching and encouragement.

Ambassadors definitely require smart staff support or they will go nowhere. You should examine carefully what benefits Ambassadors might offer your fundraising program. On the surface this project may appear to be a revenue loss, because of the drain on staff time. But if you look more carefully you will find that it can bring in major gifts with little effort while also cultivating your board members for their own gifts. Ambassadors can be an integral part of your major gift and stewardship programs.

One way to support Ambassadors is to create teams composed of board members themselves who check in with each other regularly for peer support and coaching. The teams give board members a way to support each other without over-taxing the staff.

Clustering Ambassadors together in teams for training sessions, review meetings, and/or conference calls provides an efficient framework for coaching; for the group can be dealt with as a whole. The small groups can also help to give board members what they are looking for from your organization:

- Create a team spirit among board members.
- Create a sense of fun.
- Foster new relationships among board members who do not know each other.
- Provide indispensable moral support and friendship.

Do consider the benefits of creating a formal Ambassador role for your board members who are nervous about actually soliciting. They can bring a lot of benefit to your fundraising bottom line by helping to cultivate important relationships with your key funders.

- By rekindling passion for your organization’s mission
- By involving each board member in your organization’s vision
- By tapping individual skills and building confidence.
- By engaging your board as a team, sharing in the process — and the success.

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