

## **A big ask? – involve your board in fundraising**

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### **Introduction**

Effective fundraising is supported by a whole organisation approach. Graeme showed delegates how to engage boards, trustees and executive teams to give input to and provide support for your fundraising strategy. Using his experience at the Royal Shakespeare Company (RSC), where he worked with the board and executive team to raise £113 million to transform of the theatres in Stratford-upon-Avon, Graeme guided delegates through the process of engaging their board and senior team with successful fundraising

### **Presentation**

This session is called *A big ask?* – it shouldn't be but quite often it can feel like that. I'm hoping that this session is going to help you dig into whether you're working with your board a bit or whether you are really struggling to get that traction. Hopefully we can cover a number of things that can help you get board members engaged and supportive offundraising. I've been a fundraiser since 1997 and started work with the Anchor Housing Trust and joined the RSC in 1999 until October 2013. In 2005 the RSC was ready to embark on a major transformation campaign to rebuild the theatres in Stratford on Avon and I led the campaign fundraising team on the major capital appeal fundraising. Working with our board was critical and so I hope that the RSC experience will lend a useful case study to this session and help us to talk about the issues that we face in all our organisations. It wouldn't have been possible to raise the money that we did for the capital campaign without the engagement of the board. Their support and engagement wasn't there 100% at the start and we had to work through many issues that we will look at today.

Activating your board is essential to every good fundraising campaign – especially at the major-gift end of the spectrum. In an arts context it applies to both ticketed and non-ticketed companies and the touring or venue-based organisations. So, if you've got a volunteer board or trustees you need to activate them and have them supporting your fundraising.

### Case study: Transformation, the RSC experience

- £112.8m capital campaign
- £75m public funds and £38m private funds  
Public funding was still buoyant at the time which isn't a situation that we can talk about now. But even with that level of public funding we still needed the £38m private funds to complete the total



- **Board giving around £17m**

Ultimately, the board contributed around £17m to the total. There was one very significant gift included but other board members gave more than they ever thought they were going to at the start of the campaign.

- **100% Board giving**

This was one of our stated aims in the campaign plan at the start of the project.

There's an important prelude to the campaign. When I joined the RSC it was governed by a council of around 27 governors. They varied in terms of reference, very few of them turned up for meetings and even fewer were giving any sort of personal gift but they all made use of their free ticket allocations. It was very different to the situation now. In 2000 that changed and a formal board of 16 members was constituted and they did clear terms of references, fundraising was included – not as explicitly as it is now but it was there and that board was formed with a mind to taking on a major capital project and all the fundraising requirements that goes with that so it was important to make that change. We had a Chair and Deputy Chair of that board that were really clear about responsibilities and their fundraising part in that. It was at that point that Arts Council England awarded a large part of the funding – £53m from the Capital Programme. The development team set out to raise the rest and our first job was to raise a further £20m from what was then the Regional Development Agency and then to find the private matching funds to meet the target in its entirety. We raised that through a fairly classic capital campaign – a Three Phase campaign with the Quiet Phase with the lead gifts and then a two-stage public appeal where we received larger gifts and then reached out to a wide public appeal where everybody could contribute something, at whatever level, to join in. There was nothing particularly clever about the

campaign – it was organised, we went through the process and we got that board engagement with it which made all the difference at the lead gift stage.

### Common issues



These (above) are some very common areas of resistance to board members getting involved in fundraising and getting them to the point where they are making the sort of contribution that you require of them for your fundraising annual targets and capital campaigns.

### Why involve your Board?

Why involve the board at all? Why not just hire some more good fundraisers to get on with the job and let the board get on with their other responsibilities? I'm going to argue that to really fundraise at that level you absolutely need that engagement and you need them because, ultimately, there are asks that you can't make as a fundraiser. There are peer-to-peer asks that are only going to happen and are only going to result in the right level of support if you've got your board members or other senior fundraising committee members engaged and involved.

Some stark facts:

- **Very few people find asking for money easy**  
You have to find a way to get your board members comfortable with this.
- **Gifts come primarily from individuals**  
Your board members may think that major corporate partnerships and trusts and foundations will make up your fundraising efforts but most money comes from individuals. Get your board engaged in person-to-person fundraising, activating their networks and getting you access to their networks. This has to happen if you are going to be successful with your fundraising.
- **A small number of donors contribute the most money. Fundraisers know the Pareto principle applies to fundraising**  
You want to focus your board members on top-level gifts – you want them working on the 20% who are going to get you 80% of the money that you are looking for. That's where their focus should be.

- **Major donors expect to be asked by their peers**

If you are going to ask someone for £10m they expect that to come from someone senior in the organisation with real commitment and the guts to sit in the room and ask them for £10m. How you get them comfortable with that is a really important thing that we will look at as we go through the session.

- **Publicity will not raise gifts – individual solicitation is unavoidable**

**The benefits**

- Investment in the important role of fundraising and philanthropy in your organisation
- A shared vision to fund  
Work with your fundraising team and you board to identify your fundraising goals.
- Access to their networks
- Personal investment in funding / fundraising
- Peer to peer asking
- Bigger gifts
- Success!



**A successful fundraising structure**



This is a visual representation of what you should be trying to aim for. In a perfect world you'd have all three elements working in consort on the fundraising. It often doesn't happen that way but you can fundraise successfully with two of those working together but you really want to be aiming for all three and that's when you can really start getting success at fundraising – when everybody is involved and engaged in the process. The CEO position has a really important brokering role

there to make sure that triangle can happen. The level to which you need to do that will vary on the organisational situation that you are in.

### **What issue are you trying to address?**

If your board aren't at all part of that previous triangle – as a development or fundraising professional you have a massive stake in ensuring that they are. You need to influence board recruitment in an appropriate way in order to do that. If you have people on your board who 'can't' or won't fundraise you need to look at how you can work with them to get them comfortable to do it or ultimately you need to look at how you can influence recruitment and make sure that you've got people coming on who can support the fundraising. It's tricky to do but very important. If your current board isn't engaged at all you need to work with your CEO and your board Chair to work to get them comfortable and engaged with the fundraising and if they don't then you need to refresh that board over time to get you that fundraising commitment that you need. Preferably it would be all of them but it doesn't have to be – you just need some key champions in the board that will get stuck into the fundraising. Volunteer recruitment on boards is getting more difficult – I'm seeing it a lot in the organisations that I work with. Has everyone heard the notion from the US: Give, Get or Get Off? It was something that I 'grew up' with as a fundraiser – something that I was used to hearing. We had a lot of American donors at the RSC and we developed a few more. It's difficult in the US context – up to a point it's true but there's a slightly gentler version of that now – the Three T's: Time, Talent and Treasure. I'd probably call it something slightly different but it recognises the time spent and contribution of skill that the board member makes but also draws their attention to the commitment to fundraising from them as well. In a UK context I think it's a better phrase to go with making sure that all their contributions are recognised.

### **From stakeholders to fundraisers**

Investment in the important role of fundraising and philanthropy in your organisation and creation of a shared vision to fund.

#### **Practical steps:**

- **Engage with and support Board recruitment**

At the RSC, as Development Director, I sat on the nominations committee and, using that role appropriately, worked really well in making sure that we got new board members into understanding fundraising commitments right from the outset.

- **Reference fundraising clearly in your organisation's Board job description**  
You need to make sure that your organisation's board have got a 'role description'. And that, to your point, as a fundraiser to make sure that commitment is there and in it you need to get it into that role description and clearly set the expectations.
- **Organise Board sessions to define vision, funding priorities and case for support.**  
You need to engage the board in defining the funding priorities for organisation and then work together to fund. You can build their fundraising support from there.
- **Provide appropriate orientation and training sessions**  
You need to support them as fundraising professionals. A lot of them won't find it easy and will find asking uncomfortable so you need to help get them comfortable with that and make sure that you are supporting them in any way that they need.
- **Host a deliberate whingeing session!**  
Listening is an important part of fundraising. Something that I've done in the past is to host a deliberate whingeing session. Get them into a board session and ask them to tell you what they hate about fundraising.
- **Identify individual interests and the areas they are most likely to support**  
Once the issues are on the table you can address them, debunk some of the myths, get a sense of where the individual interests and issues lie. As you work with them you'll get a real sense of how to ask for their gift when the time comes. You'll have an idea of their interests and where their motivations lie.

### **Access to networks**

You want your board members to facilitate access to their networks

#### **Practical steps:**

- **Ask them to feed names into your prospect research and event invitation lists**
- **Research their networks independently, so you can help prompt them**  
I often hear from board members that they 'don't anybody' or 'they don't know anybody who's got any money' – it's nearly always untrue. They think they know nobody but you can soon find out that they actually do and you need to prompt them and tell them how you can work with them to approach them. Suddenly they find out that they do have sources of influence and funding.
- **Remember that stakeholders are important too – but they probably won't give**  
Board members are going to be bringing people on for all sorts of reasons you hope, in terms of influence as well as purely for financial support and contribution. You need to be

clear, as a development team or as a fundraiser about where those relationships are moving towards funding specifically and where there are wider influencing relationships. Acknowledge that, make sure that your focus is there and that you understand those relationships that result in money and actually those that you know won't but are important to your organisation for other reasons.

## **Personal investment in funding**

Every member of your board should be making an annual gift – no excuses!

### **Reasons for board *not* giving:**

#### **1. I give my time**

Their time is crucial but when you can start paying your heating bill on their donated time that argument starts gaining traction but ... you can't. It comes back to that board commitment to their Time, Talent and *Treasure*. You need to make sure that you've got that board role description in place and there's an understanding there that they should make a gift of some sort. It's OK if some of them are just giving a small amount – you're not looking to set a minimum gift level for your board. You're not looking to set a minimum gift level for your board but you are looking for 100% commitment at a level that's appropriate to them. There is nobody out there who can't contribute something to an organisation that is fundraising in its own right.

#### **2. We're not wealthy people**

That's fine. Give what you can give. Give a gift that's meaningful to you – we're not setting a level, we're just saying that we want 100% commitment. What would be appropriate? Would they like to make a pledge and stage it over a number of years? Pay a monthly contribution? It could even be at the level of £10 per month or it could be hundreds of thousands.

#### **3. We're not that kind of board (!)**

Well, if you are fundraising, where's the money coming from? If you're not committed to that, how are you going to expect other people to do it? When it comes to peer asking, I've had a really direct experience of that early on with a board member and an American donor. The American donor said in a meeting 'what are you giving?' An uncomfortable position to be in! Your board members need to know that if you're raising funds, increasingly in the UK but certainly in the US as well, they are going to ask that kind of question and if you can't answer that then you are going to be in trouble. They have to

know that they've got a responsibility there. If they are going to fundraise then they have to offer their own personal commitment at some level.

#### **4. I'm on four boards – I can't give to all of them**

A governance question maybe? Is that person able to commit fully to four boards? You could have a conversation with them about how to get your organisation to the top of their giving tree. Ask what it would take for them to commit to you and give a gift to you at an appropriate level.

#### **5. I wasn't told there was an expectation to contribute financially**

That's true in a lot of cases and why you need to have a clear Board role description in place from the start. When you recruit new board members it needs to be in there.

#### **6. I give money because I want to – not because I'm pressured to**

If somebody comes up with that then you need to talk to them about what would make them *want* give a personal gift. What can you do as an organisation to make that happen?

#### **7. I'll give a gift when I sell my house / after the holiday / once the recession is over ...**

Like so many things in life ... the perfect time is *now*. Maybe you can ask them to make a pledge and pay it out over a number of years or to pledge something for a year or two's time. Make a small gift now, and a larger gift when you can.

#### **8. I've never been asked**

Fair enough. As fundraisers we should be in a position where they can say that to us.

They should be asked. A lot of organisations don't have a formal solicitation process in place for their board members and they sit to one side and, if you don't ask, you don't get.

Going back to the RSC campaign – we heard many of those excuses over the years and we eventually got to 100% board giving through a mix of persistence and having board champions. The Chair and Deputy Chair made their gift pledges and made it clear that they expected everybody else to commit at the appropriate level for them. Major donor influence helped as well such as having that American donor sit with the board member and have the uncomfortable experience of being asked the question 'how much are you giving?' I think that experience helped us in terms of the other board members who realised that, as we were approaching other major supporters, at home and overseas, they might get asked that question and needed to be able to say that they were giving something. An increasing number of US foundations and one or two UK foundations are asking for evidence that your board are giving to your organisation. That's useful in some respects and can be a good tool to help you get that 100% board giving commitment. With the RSC campaign the Kresge Foundation asked us to demonstrate that we had that board commitment.



**Delegate:** maybe the arts council should build that into the NPO KPIs?

### **Practical steps:**

- **Use the board engagement sessions to identify leadership giving opportunities**
- **Look for matching opportunities**
- **Respect individual circumstances and make your goal 100% giving, not a fixed sum**
- **Join them!**

### **Peer to peer asking**

Supported peer to peer asking will get you a better result. If you can get a board member to come a donor meeting with you there's a higher chance of getting what you want.

- **Gets you through the door to ask in person.**
- **Indicates how seriously you are taking them as a prospect.**  
It shows that you take their Gift and their capacity to give at a high level very seriously and that is demonstrated by including your board member in that meeting.
- **Allows your board member to demonstrate personal commitment.**
- **Will help get you a bigger gift!**

At the RSC we got into a routine with some of the board members comfortable to come into 'ask' meetings and making asks. We did a 'role play' before, worked out how it was going to go and making it really clear whether the board member was going to make the ask directly or if they might be more comfortable in a supporting role and the ask would come from the fundraiser in the meeting but they would build to it. Sometimes as fundraisers, you get into the room with them making the 'ask' and suddenly you realise they're not going to make the 'ask' and you've got to do it. You need to be prepared for that as well because that can happen.

### **Getting them comfortable with the ask**

Identify any resistance factors.

- **Is it timing?**  
I had a bad experience at the RSC where I knew that the Deputy Chair was really influential with somebody and could make that 'ask' and could secure a really significant gift. I had no idea, for a while, why they were really resistant to doing that because actually they was a very good fundraiser and it was all about *timing*. They were also chair of a very significant foundation and they knew that they were going to need to reciprocate. They were going to ask at the right time but only when they were in a position to deal with what they knew was

coming in the other direction which was a reciprocal ‘ask’. I realised eventually where we were at and ultimately that ‘ask’ was made and the gift was contributed. I’ve not doubt at all that the reciprocation came the other way but I needed to understand that was the reason for things happening the way they did.

- **Is it fear of the unknown?**

It’s also the fear of getting a ‘no’.

- **Focus on a ‘safe’ ask to begin with**

A way to get board members over that fear is to set up safer ‘asks’. Identify one that you know is going to be ‘safe’ and result in a gift and involve them in that one first so they have a successful and positive first experience. They don’t always result in a ‘yes’ but you can try to manage that process with a board member who isn’t yet comfortable with making the ‘ask’.

- **Work through how the ask might go**

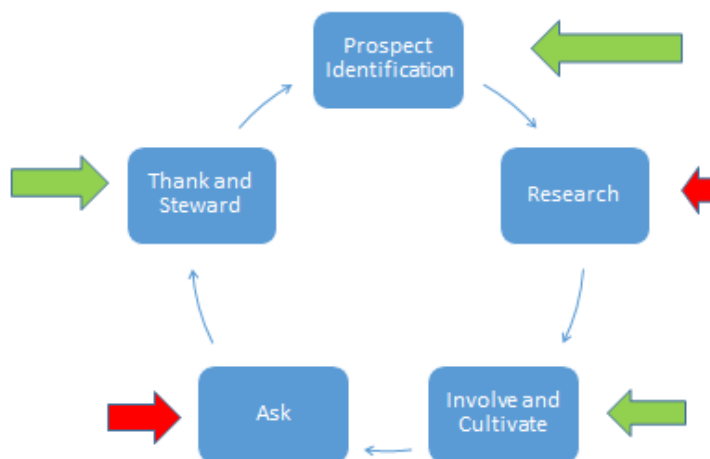
Have a thorough briefing and work out who’s going to do the ‘ask’ and who will be in the supporting role in those meetings.

- **Agree team roles**

If you’ve got board members who love to write letters you need to wean them off that because, while it’s fine in some instance, what you really want to do is get them comfortable with face-to-face meetings as it shows clear commitment. Letters are great for thanking people after they’ve made their gift but asking for a high-level gift in a letter is not ideal.

**Can’t ask, won’t ask!**

**Stages where your board members can input to the fundraising cycle**



Some board members may never get in the room or get the confidence to ask for gifts. There are many other ways that they can contribute to your fundraising. Above is the classic fundraising cycle. They can contribute at those green (arrow) 'safe' levels so there's no reason for your board members not to be involved and your job is to get them as comfortable as possible with the 'ask' where they can really make a difference. They won't all get there – at the RSC we had four or five who were really confident fundraisers out of sixteen. I would say that the others would do it but they wouldn't be comfortable in the face-to-face 'ask' meeting and it took a while to work through that process and get them comfortable.

## QUESTIONS AND DISCUSSION

**Delegate:** I'm not working at a senior level so I'm a step away from our board but I find that, if I send messages via my managers to the board, they get diluted. To the point where, recently, we ran a crowd funding campaign and we tried to get the board involved and I tried to get that message through to the board that this was going to happen and that we wanted their support but I didn't get anything from them – any kind of response – and eventually, in a phone call with one of the board members they said that they hadn't realised anything was expected of them. I think it's difficult to get the messages across to the board and I think it is finding an ally on the board or a board champion who can help to influence the rest of the board

**Graeme:** looking back at the structure triangle from earlier, that senior manager is very important in brokering that communication and relationship between fundraising and the board.

**Delegate:** I know that we've got a board member joining who is a fundraiser and who I have a relationship with from a previous role so I'm hoping that will change things in a more positive way and I'll have an ally and a fundraising champion.

**Delegate:** do you think it works better when you've got a specific campaign such as a capital campaign or a fundraising target or for more general revenue? Is it better to get your board members to give regularly a small / medium-sized amount or is it better to have them donate a large amount for a particular campaign?

**Graeme:** From my experience we tried long and hard before the RSC capital campaign to get that 100% board commitment and the first time we got it was during the capital campaign so it acted as a kind of catalyst for that change. It ought to be the case that your board members are making an annual gift that is appropriate to each individual board member. It should probably more than £10 or £20 per year but there is no minimum gift level and you can still say to your donors and stakeholders that your board are all giving to the organisation – you shouldn't be expected to tell

anyone how much they are giving – you just need to be able to say that you've got them giving 100%.

**Delegate:** Chief Executives can be very controlling with their boards and want them to be mainly 'rubber stamping' proposals and suggestions and don't use the board as a resource but more as an approval mechanism. We've got a lot of work to do with supporting board members.

**Graeme:** You can't emphasise that enough, you've got to support them to fundraise. They're not necessarily going to be comfortable with it, it may not be something they've been involved in a great deal before and so you have to be there to support them and give them the tools to do the job. The classic way we did it at the RSC was that I always went to major gift meetings with a board member. We would plan beforehand what we were going to do, decided who was going to make the 'ask' and we went and did it together.

**Delegate:** On a very positive note, at our organisation at the moment, our Chair is asking someone at the moment for five figure sum.

**Delegate:** I just wanted to follow on from that because, even before you get to the meeting, there are possibly opportunities for the cultivation to start and one of the things that I've found really useful, because I work with three boards at the moment but they are at different levels of engagement with fundraising. One of the boards, at the moment, I'm just trying to get on to their agenda as an agenda item even though I'm their Head of Development. The strong board, that 'gets it' is now going to divide and conquer and individually start talking to the other board members to discuss how we are going work better to meet those fundraising requirements. But, what I've found really helpful, when they were at the point where they just didn't know how to engage with the fundraising was that in the cultivational opportunities that arose was to have really clear briefs for the events and to give each board member attending at least one person to focus on. We Googled people, tried to get a photograph and find out how they got on the guest list to start with – who's guest were they? What was their relationship with the organisation? That way, you're creating a mini script for the board member to feel confident when being asked to talk to a stranger in the room.

**Graeme:** As you mention, making sure they can focus on a manageable number is important. I've seen on a number of occasions at development events that everyone gets the reams of bios and photos and they can't possibly get around the room. In an arts context, at the RSC, three hours of your event would be the performance and the time around that to get to people was limited. Giving

your board members some key targets each to ensure that they can focus and to brief them fully in advance is really important.

**Delegate:** We've got a stellar board which was being used as a rubber-stamping system and a couple of our board members used to bet on how short the board meetings would be. As soon as I started six months' ago I had one to ones with all the trustees and so many of them showed frustration that they wanted to help but they haven't been asked before. One of the other things that was useful to find out was that I could tell, from who they were, why our organisation had asked them to be on the board. They were an accountant or a lawyer etc. but I didn't know why they had said 'yes'. But I do think that wasn't probably the same thing. They weren't saying 'yes' to being on the board because they were an accountant or a lawyer, they were probably saying 'yes' because they had a real interest in the organisation. I started asking them 'how can I make your term as a trustee as enjoyable for *you* and fulfilling for *you* as it is also going to be for us to have your expertise on our board?' 'How can it be a joint relationship rather than me expecting something from you but I haven't yet told you what that is and vice versa?' That has created a really nice relationship and a sense of trust and openness.

**Graeme:** Exactly. You value those relationships with the board members, you have those direct relationships which mean that you can get a real sense of what they are about and why they are there which is fantastic. That's what we should all be working to achieve.

**Delegate:** I'm lucky enough to have a board who are giving 100% - at difference levels from three-figure gifts to six-figure gifts. One of the problems that I have is that they are hiding behind that giving. They're saying that they are really committed but they've forgotten about their other fundraising responsibilities and I need to remind them that it's not enough, that while we're grateful for their gift and I see them as donors as much as I see them as a board, that actually we're in a new phase of artistic development, we're very excited with our plans and are in the best place for support that we've been in for a long time but we need to widen our networks and get in more gifts – not just theirs. Reminding them about that has been a bit of a challenge. Our Chair, at the end of our last board meeting, surprised them all by saying 'the board meeting is over but, on camera, we'd like you to state why you are here. Some of you have been here for a while and some of you are new, so what is it? Why are you here? What is it about this organisation now that has made you come to be sitting in this room at 8.30 in the morning and make your gifts?' It was such a useful exercise and the engagement that I've had from them since that meeting has been phenomenal as they were reminded why they wanted to be there and they are suddenly back on

board. Reminding them of that by asking them why are you here has meant that they all developed their own mini cases that are personal to them for why they want to be on our board. I'm already seeing the results of increased engagement.

**Delegate:** Quick question ... do your board meetings always happen in the morning?

**Delegate:** Yes. 8.30am.

**Delegate:** Does anybody else have board meetings in the mornings?

**Some delegates:** Yes. Breakfast meetings.

**Delegate:** I'm not a fundraiser and we don't have a dedicated fundraiser in our organisation but that may need to change as we've got a big fundraising campaign coming up in six months' time. Occasionally I do receive money from people when it is marketing related. For example, a colleague just received £5,000 from somebody but it is so sponsor the dress rehearsal of the pantomime – they therefore get x amount back for their money. My question is, all these donors or people who give, do they get anything back? Or is that completely the wrong way of approaching it? Is it just their money that you want?

**Graeme:** No. Not at all. It depends on the level of the gift and the benefits are appropriate to the level of the gift. For example at the RSC we had all the usual things that you'd expect to see in an arts organisation – different levels of membership and patronage. For those they get specific, tangible benefits. At the higher level it's a different approach but you build a relationship with a major donor that has all sorts of facets to it that – returns and benefits to them and their relationship with the organisation. But they might not be structured in the classic way – they are specific to the individuals and the gift that they give.

**Delegate:** If you are inheriting a board and therefore haven't been able to establish the Terms of Reference from the beginning, once you have uncovered their motivations, have you ever been in the position where you've discovered that those aren't what you would have hoped for or in line with the organisation? Maybe they're doing it simply to be seen to be on a board? Maybe their reasons aren't necessarily altruistic?

**Graeme:** It does happen. It's going back to that reason for not giving: 'I'm on four boards – I can't give to them all'. It is people gathering their board positions almost like trophies to some degree. There are people like there and I've come across one or two. I think that's the situation where somebody at the right level, fellow board member or ideally the board champion, sits down and says that either we need you to commit to this and that commitment involves your time, your talent

and your treasure to an appropriate degree, or we need to think about if this is the right thing for you and the organisation.

**Delegate:** It naturally all becomes very 'real' if you are having board session where you are being transparent and honest these things may reveal themselves at that point.

**Graeme:** I'm sure it would. The appropriate influence that you can have as a development professional in that board nomination process – refreshing that board over time – but the other issue that you might have, governance wise, if you don't have a role description, is that you have no way to get rid of any who are actually useless as there's no term of office. The RSC went through a similar process – it was basically a lifetime place on the board – you joined up, you didn't have to turn up to anything, you were just 'there' and your name was on the letterhead.

**Delegate:** Can you introduce your Terms of Reference to an inherited board?

**Graeme:** Yes, you can, but you need a board champion and your senior executives to work through that process with the board and explain the importance of the changes – that it's fair to the organisation to introduce those terms of reference and that everybody knows where they stand and it's your chance to build in that fundraising element. After the three year term of office you can then gently move people on if they're not being helpful and replace them with people who will be more useful to the organisation.

**Delegate:** One member of the small boards that I work with, will not bring anyone and says that it's a conflict of interest. I've talked to the director and said that I don't think this makes any sense governance-wise there can't be a conflict of interest otherwise why are they sitting on the board, in fact it's the charity secretary, and I went to the Chair as well and still can't seem to resolve this. Any suggestions on what to do about that? This is why I wish it was built into a KPI for Arts Council NPOs because it would be a great back-up to say to the board that they *have* to be involved in fundraising.

**Graeme:** How can it be a conflict of interest when it's a fundraising organisation, to get involved in fundraising? It's part of the job. But, how do you deal with that in practice if you've got a senior board involvement and it is still unresolved. Ultimately there comes that difficult thing where you need to move somebody out and somebody in who is going to get involved and engage but you can't always do that quickly or immediately. You need to look elsewhere on the board where you have got champions who will fundraise or can be persuaded to support and actually focus your attentions on them.

**Delegate:** So, don't rely on the Chair to do anything about it?

**Graeme:** You need to get the support of somebody on the board who is comfortable with

fundraising and who is going to be your board-level champion. At the RSC it was our Deputy Chair who was the real fundraising champion and the Chair became the champion through the influence of the deputy chair and others as well.

**Delegate:** Our Chair had a mentor who was head of ... which then started to shape the role.

**Graeme:** Many Chief Exec levels in arts organisations just don't realise how important they are to fundraising and how much of their time needs to be spent on doing it. You've got to win that battle because it's becoming more and more crucial.

**Delegate:** We have two boards. One of them is a development trust who I feel that we've made good progress with – at the end of last year we ran a match-giving campaign with the Big Gift and our entire board donated. I have access to them and we have bi-monthly meetings at which we see them and I can talk directly to that whole group of 15 trustees. The main board, on the governance side, I don't have access to. And, although some of them are giving, some of them give through their companies – is that an excuse or is it OK? Our corporate manager is happy that they are doing that but I feel a bit as though they should be giving individually as some of them already are.

**Graeme:** I take a hard-school approach to that and think they should be making some sort of personal gift as well. Maybe start with a personal gift – at whatever appropriate level that is for them – and that then builds out into their relationships and where they can secure funding from elsewhere. Their corporate contributions through the company that they are working for are fantastic but it would be nice to have the level of commitment that means they contribute something themselves as well. If it's their own company that's slightly different and there should be flexibility around that but it would be good for them, I think, to feel that they are making some sort of personal commitment.

**Delegate:** I think it's because I don't have that direct access to them in the same way I do with the development board so I didn't see them engage with the campaign of last year because they didn't hear us talking about it.

**Graeme:** It's interesting that you've got your organisational board and your development trust as well and you're in a situation where the organisational board think it's the responsibility of the development trust and they shouldn't have to 'give or get' because that's what the development trust is there for.

**Delegate:** Is there anyone on your main trust (to initial delegate) who sits on your development board?



**Delegate:** Yes, the Chair of our Development Trust also sits on the main board.

**Graeme:** Then they will be your champion on that committee.

**Delegate:** I just wanted to ask a question about Deputy Chairs as you've mentioned them a couple of times. I have experience of working with Chairs and Deputy Chairs and it is something that we've talked about because we need to refresh our board our board for various reasons – people have come to the end of their time with us etc. and. Our Chair is resistant to that because of the view that 'if it ain't broke, don't fix it' and says that they're all giving money so why would you want to change that yet actually we do really need to do that to keep the growth of the organisation. One of my fundraising champions on the board is great and at the end of every meeting pipes up and asks about what we're doing about new board members but it just gets brushed aside. We've talked for a while about a Deputy Chair being useful anyway and for me I can see that this fundraising champion is a natural Deputy Chair anyway and who might help with some these other aspects of the board that the Chair doesn't see as necessary at the moment. Has anyone got any experience of appointing Deputy Chairs where there wasn't one before and are there typical roles that a Deputy Chair would take alongside the Chair?

**Graeme:** In terms of the RSC there was already a Deputy Chair in post when I joined. In our case, because of who it was, that position was the lead fundraiser and particularly during the transformation project the Chair was heading up the decision-making process and being brilliant at that. The Deputy Chair would sometimes cue up the Chair to say something in fundraising terms and encourage the rest of the board to give because they had given or raised the level of their gifts. So, in our context, the Deputy Chair was our fundraiser and encourager and the Chair was focusing on other organisational priorities.

**Delegate** (in response): We had a Deputy Chair at my previous organisation and we had a job description for that role – you can make it what you want. My suggestion would be to discuss it initially with your Chair and work it through. I guess the biggest argument would be in the event that the Chair couldn't be at a board meeting, or, say, a meeting with ACE or similar, your Deputy Chair could attend instead.

**Delegate:** We're using the Deputy Chair role to prepare board members to be the next Chair.

**Graeme:** Great – really useful for succession planning.

**Delegate:** one of the main issues with the Development Trust and the main Board is that the positions are held by a corporate entity rather than in an individual capacity so the situation is

historical. If somebody suddenly retired, that position on our board is then handed to somebody else in that organisation. Is that quite an unusual situation?

**Graeme:** I have heard of that happening elsewhere – that's a wider corporate governance issue that needs overhauling because you've got not control over the people who are coming on to your board. The organisation is going to struggle to get the right make-up of the board if that continues.

**Delegate:** Has anyone got any advice on setting up a Development Board because our organisation is in the process of doing that at the moment and I wondered if there's anything that I should be doing from this starting point to help shape to work best? Thinking about frequency of meetings, size of group – any tips?

**Graeme:** One thing we touched on earlier on was making sure that you've got that link between the board and the development board. It's important that you've got that person who welds the two together so that one doesn't do its own thing without reference to the main Board. From a practical perspective I would say to keep it a sensible size – don't go too big because you want them to meet and be active and you need to manage relationships with them – focus on quality rather than quantity in terms of the individuals. Anybody else got any tips?

**Delegate:** Define clear roles and responsibilities. If their role is unlike the main board overall governance but in development, the focus needs to be on helping the organisation raise money. You can be prescriptive and even, some boards even have the challenge of raising say, the equivalent of x amount per year – set a target. It could be they have to raise that individually from their own pockets or they bring somebody else in who gives it or it's in kind so they're saving you that amount of money by giving a very specific service towards the fundraising activity.

**Delegate:** I would agree that you need to keep your board (small) a manageable size but keep the option to co-opt on specific people that you might need. You might have a particular campaign or big event coming up and you might have someone in mind that you think would be great and useful to have on the board for that short time.

**Delegate:** I know it sounds obvious but again, don't just make it board members who are focused on development, you need other people from outside the board to be engaged as well because that way they can focus on just the one thing.

**Delegate:** Internally as well, sometimes if you've got a few staff champions who are interested in helping fundraising, get them to come along to your development board meetings as well because that then starts to make fundraising everyone's responsibility across the whole organisation not just you and the development team – everyone is involved in it.

**Delegate:** On a similar note, I think I'm in a similar position to you, where I'm the person responsible for fundraising and I don't go to the board meetings. I'm also the box office and front of house manager as well so, wearing my Front-of-House Manager hat, if the board is going to organise a big event then I need to have the person who's going to be involved in the practicalities of that event to be involved in the meetings and the planning because it's really frustrating if you suddenly have to sort something out and you don't have all the details.

**Delegate:** We had a false start on getting this going as while everyone liked the idea of having a development board no one wanted to Chair it ... not even the fundraising champions – they wanted to be involved but they didn't want to be the Chair. We began a process of finding the first people to be on this committee and had lots of committee members and one of the trustees led that nomination process but failed to identify an adequate Chair and didn't want to be the Chair themselves. Suddenly I ended up with a board of very enthusiastic people but no peer Chair for this group. I think the trustees thought that it would be OK because 'the fundraiser might do it' but unfortunately it doesn't work like that and it has to have its own Chair, sitting on your board that lends it that weight. It is now off the ground as we have now identified a Chair and fortunately, I was able to develop some really great relationships with those people who are real advocates. That process of finding a Chair early on is crucial because they should really be the person asking people to join that board.

**Graeme:** Exactly. The link between the board and your development group is really crucial.

**Delegate:** At the moment, we do have a Chair and know who the board members are going to be and I'm interested to see who they are going to co-opt on as I've not been asked who I think would be good.

**Graeme:** I've seen an example recently of where there isn't that link between the board and the development group – it was formed and has 'broken loose' and gone off on its own direction. Then there's the painful process of bringing it back again and making sure it's welded back to the organisation and the priorities and objectives of the board. That's much easier to solve at the outset than it is to try to retro-fit it back.

**Delegate:** I did some freelance work for a large organisation in the North West and they had a development group that was a separate charity and they went completely 'rogue' (too strong a word for it but) they could have technically gone their own way yet their whole charitable purpose was to support the organisation.

**Graeme:** It's so important to have that person that's got that 'link back' to keep them in check and make sure that what they are doing fits with the priorities of the organisation as a whole and that's the key thing. It's about that actual person in the room as much as it is an aspiration on paper.