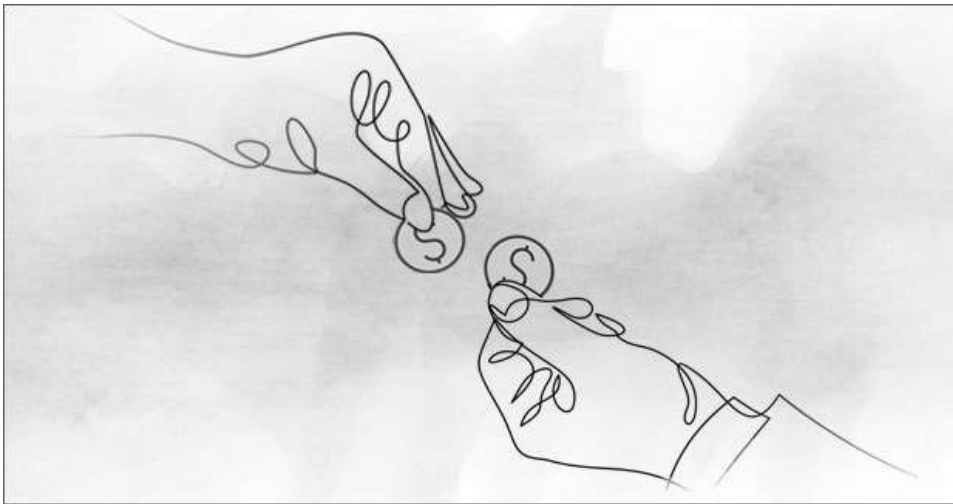


JOAN GARRY

## 5 Reasons Your Board Would Benefit from a Give and Get Policy



A give and get policy can mean slightly different things to different organizations.

But essentially it means that every board member must ‘give’ a donation of a certain amount AND help to procure financial resources.

It is typically something that the board votes on so that it becomes part of what candidates are told when they are being vetted for board services.

Please note that it is not a give OR get policy. Every single board member must give. There are many reasons for this, but my favorite? Because the two most powerful words a fundraiser utters?

*“Join me!”*

But all too often, boards push back. They don’t want to be on the hook for this. And it’s not *just* board members who push back – executive directors and development directors do too.

Today my goal is simple. To introduce you to the benefits. Staff leaders can be dogs with bones about this (not helpful) and just pound their fists that it’s the board’s JOB.

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This is not the path to success.

Why not try framing the conversation differently? The list of 'why not's' is clear (and long). And if they're not, I'll write more about them below.

Let's focus on the benefits instead, shall we?

Here are five benefits for a give and get policy. I bet you will find that at least one of them will offer you an 'AHA' moment.

## FIRST, 5 REASONS BOARDS PUSH BACK ON GIVE AND GET POLICIES

Have you said or heard any of the following when the phrase 'give and get' is tossed into a conversation around board fundraising?

*"GET? Are you kidding me? Not all of our board members GIVE!"*

*"Don't you think I would have remembered if someone said I had a fundraising responsibility during my board interview?"*

*"I don't know any wealthy people."*

*"I am not wealthy."*

Oh, and then there's this gem:

*"We can't have a give and get policy because we want to diversify our board."*

Allow me to explain why that one has a particular sting. Young people can be very effective fundraisers and they can give SOMETHING. And any statement that implies or infers that people of color are poor? Problematic. I think that is the kind word.

These are the most common objections I hear from both executive directors, development directors, board chairs and development committee chairs.

## 5 REASONS YOU NEED A GIVE AND GET POLICY

1. A board without 100% board member giving is a weak board. It tells external funders something highly unflattering about the commitment the board has to the organization. Some foundations walk away from nonprofits without 100% board giving.
2. Mature boards understand that growing the financial resources of the organization is one of their key responsibilities and a policy formalizes that understanding the commitment to deliver.
3. It tells board prospects that you are serious about meeting your obligations. If the existing board doesn't take things seriously, they won't either once they join.

Dear Joan

What Are You Struggling With?

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4. When multiplied by the number of board members, it represents a target revenue number the organization should be able to rely on from the board as a whole.
5. A policy introduces accountability. You either hit the number or you don't. This is different from, "We'd like to see you invest more time in fundraising." The former offers the perception that board leadership have teeth; the latter? Not so much.

## WHAT IF BOARD MEMBERS DON'T HIT THEIR NUMBERS?

Technically, a policy is enforceable. But I would steer clear of technicalities.

The give and get policy is a goal. And goals are vital to performance assessment.

It gives you something tangible to discuss in what can be a pretty informal annual board member evaluation conversation. "So I see you had a tough year on the 'get' side of things – let's talk about that."

It becomes a hook for a conversation about their efforts, their level of commitment and a way to either pat someone on the back as a rock star or a way to illustrate to the board member that this may not be the gig for them.

You might find out something really important in those conversations too. You might learn that **your staff is not supporting board members effectively** – that they could be doing more to equip board members to be successful.

## HOW TO MAKE THE BEST CASE FOR A GIVE AND GET POLICY

As I wrote this I realized that there is a second part to this post. So you are now armed with some clear benefits. But with all the resistance you know you will face, how do you make the best case?

Stay tuned for my next post!

In the meantime, if you have benefits to add to my list, let me hear 'em. Maybe I'll edit the post to TEN 😊

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**FromAWildKate** • 2 years ago

Another benefit: Give and Get policies give Development and Executive Directors a specific occasion around which they can reach out to confirm the giving (and the getting) of Board members. Accountability flows all ways, and this creates a more specific metric to achieve.

1 ^ | ▾ • Reply • Share >



**Joan Garry** Mod → **FromAWildKate** • 2 years ago

YES!!!!

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**Suzanne** • 2 years ago

Another benefit: When board members help to solicit or facilitate a gift, it gets them more engaged. When their efforts are celebrated, it builds excitement and confidence. It's fun to be a part of a successful effort. All of this makes board members want to give more themselves.

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**Erik B** • 2 years ago

We're forming an advisory board and have been struggling this decision. We have a prospect who has amazing industry connections and a diverse perspective. However, she just left the major company she worked for and doesn't have the money to give. Would it make sense to allow her to raise the donation 'on her behalf' from one of her contacts? If our chair and ED allow this, should we announce it to the rest of the board, or explain when/if it comes up?

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**Mike Rogers** • 2 years ago

I've worked with boards with activist members who are unable to contribute. In those cases we developed a policy that had each board member and development committee chair set an individual goal for give/get. We asked them to "give a gift that for them would be significant." For an activist who works part-time, that may be \$100 over the year, for an exec at Target it will be a lot more than that.

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Liz KG • 2 years ago

We are a national board. Everyone currently on the board was recruited to and has "agreed" to a certain level. They signed a board service agreement that clearly states this as well. Very few give or get to that level. It's so frustrating. We recently had a board discussion and they clearly do not want the give and get, more importantly they don't want a dollar amount. They agreed to this when they were interviewed, vetted and on-boarded. They were not held accountable at all previously. I'm the new chair and Feeling very lonely. We are in the process of reviewing what we do going forward. Joan, do you have any thoughts?

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Joan Garry Mod → Liz KG • 2 years ago

Do not despair. Next post I tackle how to sell it in. And remember, at first, it is a benchmark. And chat with your board chair / ED with this post. Some of the best benefits are not obvious to board

#### ABOUT ME

Joan Garry is a non profit consultant with a practice focusing on crisis management, executive coaching, and building strong board and staff leadership teams. She is also a professor at the Annenberg School for Communications at UPenn.

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