

## **Actions steps for engaging the board in your legacy initiative.**

Past experience has shown that if 75% of a board commits to leaving a legacy, than an organization's legacy campaign will be successful. Therefore we all need to continue to work with our boards to reach this goal.

According to Robert Cialdini there are key influencers that persuade board members to participate in fundraising. Among these are 'liking,' 'authority,' 'social proof,' and commitment and consistency. Board members will give to other board members they like especially if they are perceived as authorities. They will give to their peers in order to be perceived as fitting in. And once they've committed, they will be more likely to follow through.

If you are just beginning to approach your board for their legacy commitment or you have already made a few attempts but are not yet at the 75% participation rate, I recommend you take these actions:

1. Begin by getting your board president to understand that in order for your legacy effort to be successful all board members should make a legacy commitment that demonstrates their passion for your cause and commitment to their role as a board leader.
2. Ask your board president to talk about the reason why the board needs to become actively invested in your legacy program, by giving and getting, at a board meeting. Discuss your legacy commitment goal, the incentive grant you will receive for reaching this goal and the timeline for doing so, and have your board vote on this to establish their buy-in to both the campaign and the goal (you may want to do this first in an executive committee session to get your key leaders invested).
3. Encourage your board president and executive director to schedule a time for the board to collectively engage in legacy conversation training that helps them become more comfortable with their leadership role in facilitating philanthropy to assure adequate financing to sustain your organization in the future. Feel free to share the LIFE & LEGACY "The Legacy Conversation" PowerPoint with them.
4. Have the board president ask other officers and your development committee chair to help make personal, face-to-face asks of all board members (have the executive director or another officer make the personal ask of the board president).
5. Create a deadline for board commitments (this is super important if you want your board members to go on and ask other donors for their commitments). Only after board members have made a commitment about which they feel proud will they be able to effectively ask others for generous support.
6. Keep the momentum going (and hold your board members' feet to the fire) by scheduling a legacy update on every board meeting agenda. Always announce the results of the board campaign (% participation) along with a general update on your progress, and

encourage those board members who've not yet committed to do so. Don't give names, assign blame or try to shame folks. Keep things upbeat and positive, giving the message that you assume those who've not yet committed will eventually do so.

7. Have board leaders make follow-up calls to any slow pokes.

Based on : 7 Proven Keys to Get Nonprofit Board Members to Give by Claire Axelrad. January 15, 2014 Clarification email.