

We have joined boards of organizations—large and small, local and national—when we thought this would contribute to their impact by helping with governance, fundraising and, in several, instances fraught leadership transitions. But Paul resigned from the board of a prestigious university after one term; though it gave him fascinating insights into the faculty’s cutting-edge research, the university did not need whatever expertise he could bring to the table.

With few exceptions, our engagement with nonprofits has been deeply personally rewarding—indeed fun—because we believed we were making real contributions to the organizations’ impact. But we also have gotten tremendous satisfaction from the work of organizations in which our only engagement was writing a check, knowing that every dollar contributes incrementally to their impact on issues we care deeply about.

ACTIVITY REFLECT ON YOUR TIME AND TALENT

Volunteering

If you think you might like to volunteer your time for a particular organization, ask:

1. Is that organization accepting volunteers? What responsibilities do volunteers have?
2. Do I have the skills, expertise, or connections to be helpful to the organization?
3. What is the time commitment for volunteers at the organization, and am I able to commit the necessary time?

Board Service

Board members offer a variety of skills and expertise, often based on their experiences and professional work, to assist with the overall functions of the board. How you can make a difference in the organization depends on its needs.

If you're interested in board service, ask:

1. Do I have enough time for board service?
2. Am I willing and able to meet fundraising expectations?
3. What skills and expertise can I offer the organization's board?

For resources on board service, see *BoardSource and the Balance*.⁵⁹

Developing Relationships with Organizations Takeaways

- ➔ If you've conducted thorough due diligence of an organization and feel confident that it will use your gift wisely, there may be no need to further contact the organization before making the gift.
- ➔ If you think you can add value beyond your gift or want to be more involved in your focus area, consider volunteering with the organization, including serving on its board.

DONOR STORY

The Role of the Donor—*Kathy Kwan*

The donor journey can be many things all at once for the individual donor: rewarding, humbling, lonely, exhilarating, and exasperating. Having funded more than 60 organizations over the last 14 years, I have found each experience to be unique. Almost always, I am excited about how my grantees positively impact their beneficiaries and am awed by their personal dedication and commitment to make the world a better place. That said, I have found that my personal satisfaction rests in my ability to establish an effective donor-grantee relationship. Some rules of thumb that have worked for me:

- **I have a unique set of personal responsibilities.** It's my role—as a donor—to have a clear focus about what I want to achieve with my philanthropy. In this capacity, it's my job to find and partner with organizations that align with my objectives. To be successful, I need to ensure that my partners are led by strong leaders, are financially responsible, and are committed to meeting our shared goals.

- **I aspire to be transparent and honest about my motivations.** I'm human—if I get involved in something, I'm personally invested, and let's be honest, I want something out of the relationship—whether it's wanting to “help,” being part of something bigger than me, bragging rights, a plaque, a sense of personal satisfaction, or whatever. It's my money and I want to see something come of it.
- **Successes and failures are ultimately in the hands of the grantee.** The organizations I support are the primary designers and executors of their strategies. As the funder, I need to respect them and cede day-to-day management and decision-making to the leaders of these organizations—even and especially as it pertains to my grants.
- **I am part of an ensemble. I am not a soloist.** Usually, I am one of many stakeholders at the table. Each of us brings a nuanced and personal perspective, and the grantee needs to balance our strengths, priorities, and competing agendas.
- **Money does not automatically buy influence.** Beyond being a funder, a donor can play myriad influential and valued roles: catalyst, thought-partner, trusted advisor, connector, valued board member. These roles are earned, not granted. It takes time for both the nonprofit and the funder to build rapport, trust, and credibility.

No one is perfect, and every so often, things go haywire: I become too emotionally involved, a suggestion goes unheeded, I might feel slighted, or my contribution isn't acknowledged in a meaningful manner. In these moments, I have had to learn to lick my wounds, take a chill pill, and objectively assess the situation. I ask, “How much of this is about me and my expectations?” “Could we have avoided this situation?” “What is the context and what are the competing externalities and priorities?”

I am both inspired and humbled by my philanthropic “journey.” I am addicted to the sense of satisfaction I get six months, a year, or even two years down the line as I watch the programs I've funded come to fruition and my grantees grow and evolve. And that's what brings me back to philanthropy year after year.

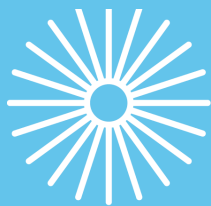
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GUIDE

TO EFFECTIVE PHILANTHROPY

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