

**Thriving as a
Board Chair**

*Facilitated by Steve Lew*

**Session 3: July 10, 2018**Board Engagement and Board Fundraising

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**Group Agreements**

* **Confidentiality** is often defined as “what’s said in the room stays in the room” and we agree not to discuss what happens here in a way that would identify any individual or organization. There is another dimension to confidentiality that includes “asking permission” to share or discuss any statement another person makes of a personal nature. It helps to remember that the story belongs to the teller, not the listener.
* **Move-up Participation**. Honor different beliefs and encourage all voices, experiences and ideas to be heard and shared. Talking does not equal participation. Generous listening is a form of participating. If you speak a lot, try listening more. And it you tend to sit back and listen, consider speaking up more.
* **Be open to new ideas and perspectives**, and be open to having your current ideas and perspectives challenged.
* **Embrace inquiry**. Ask difficult, reflective questions as a matter of course.

**Today’s Outcomes**

As a result of today’s session, you will have:

* Learned from your peers about their successful practices to engage others
* Reflected on your board’s fundraising practices and culture
* Committed to 1 next step you will take as Board Chair and 1 next step as an ambassador or fundraiser

**Mingle Magic**

* What’s the very most recent thing you did or communicated as board chair?
* What’s one thing that happened in your past board meeting that surfaced joy, gratitude, or inspiration?
* What’s one thing that happened in your recent board meeting that surfaced irritation, frustration, or disappointment?

**Spectrum exercise**

Line up on spectrum of *Highly Engaged* to *Barely Breathing*.

* What words do you and others use to describe your board’s energy or culture?
* What actions do you or lack of actions do you see happening?
* What has been your role in this? The ED’s role?
* Who is an ally or close partner with you to increase member engagement?

**Reflection**

What are you sensing about your board’s culture & practices that grow or limit member engagement?

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**Board Member Engagement**

|  |  |  |
| --- | --- | --- |
| ENGAGEMENTWhere it happens | WHAT IT LOOKS LIKEMindset + Behavior | STRATEGIESHow to get there: Leverage Strengths/Interest, Culture, Process, Practice |
| BOARD MEETINGSCollective governance | * *Preparation beforehand*
* *Hearing from all voices; listening for different perspectives*
* *Asking questions, sense of curiosity, inquiry, ownership*
* *Assessment of meeting agendas and member participation*
 |  |
| COMMUNITY ENGAGEMENTBetween meetings | * *Brand advocate and brand ambassador*
* *Attending events*
* *Networking and introductions*
* *Recruiting new volunteers*
* *Building relationships with new supporters*
* *Spotting intersections and making connections*
 |  |
| SUPPPORT STAFFIndividual volunteerism | * *Service without governing*
* *Be available for 1-1 advice/counsel*
* *Volunteer in program work*
* *Get to know staff and what they do*
 |  |

**Fundraising Bright Spots: Key Themes**

**Fundraising is Core to the Organization’s Identity**

“Leaders and sharing power is the core of what we do. So this is about developing leadership that plays into fundraising” -Queer Women of Color Media Arts Project

**Fundraising is Distributed Broadly Across Staff, Board and Volunteers**

“We applied our learning from Bright Spots to achieve 70% staff participation in our most recent fundraising campaign in March 2017, which raised $187,000 in three weeks from 1,100 donors. It was our most successful org-wide fundraising campaign to date”. -Women’s Community Clinic

**Fundraising Succeeds Because of Authentic Relationships with Donors**

“I’ve seen and been in so many conversations where fundraisers indicate a fear of having honest conversations with donors. But I don’t think we can do this work effectively if we can’t have honest, respectful conversations, including strong disagreements as needed, with our donors” -Vu Le, Nonprofit AF

**Fundraising is characterized by Persistence, Discipline, and Intentionality**

“We don’t have a singular development plan. We have a system.” Jewish Voice for Peace

**Fundraising Bright Spots Self-Assessment**

|  |
| --- |
| **Fundraising is Core to the Organization’s Identity** |
| **Mindsets** | **Strongly Disagree** | **Disagree** | **Agree** | **Strongly Agree** |
| 1. The decision to raise money from individuals—as well as the approaches used to do so—are steeped in existing organizational values.
 | 1 | 2 | 3 | 4 |
| 1. Being genuine about who we are and what we stand for as an organization is core to fundraising success
 | 1 | 2 | 3 | 4 |
| 1. Fundraising is a form of organizing our base and power-building, not merely a strategy for financing the organization’s work.
 | 1 | 2 | 3 | 4 |
| **Fundraising is Distributed Broadly Across Staff, Board and Volunteers** |
| **Mindsets** | **Strongly Disagree** | **Disagree** | **Agree** | **Strongly Agree** |
| 1. Fundraising is not the purview of a select group of professionals, but a process which, if well-supported, anyone can engage in.
 | 1 | 2 | 3 | 4 |
| 1. Development directors are organizational leaders focused on skill building, culture change, and systems development to support others in fundraising.
 | 1 | 2 | 3 | 4 |
| 1. The conversation about fundraising goals and progress belongs everywhere. It’s not contained in a single department or confined to a single team.
 | 1 | 2 | 3 | 4 |
| **Fundraising Succeeds Because of Authentic Relationships with Donors** |
| **Mindsets** | **Strongly Disagree** | **Disagree** | **Agree** | **Strongly Agree** |
| 1. “Donor” is only one aspect of the many relationships that committed supporters forge with our organization.
 | 1 | 2 | 3 | 4 |
| 1. Authentic relationships with donors are part of a larger organizational culture that values relational rather transactional interactions with everyone.
 | 1 | 2 | 3 | 4 |
| 1. High trust and accountability among staff and board members allow leaders to weather fundraising’s inevitable ups and downs together.
 | 1 | 2 | 3 | 4 |

**Board Fundraising: Culture of Philanthropy**

A dimension of board culture is the way in which the board supports and engages in fundraising activities. Frustration among executives and boards related to the board’s role in fundraising runs deep. Many of the issues can be traced to culture—specifically an underappreciation and misunderstanding of what a culture of philanthropy is and how it relates to board service.

While familiar to fundraising professionals, the term *culture of philanthropy* is not yet well understood nor commonly used across the sector. Not to be confused with institutional grant making or the act of giving money as a donor, **a culture of philanthropy refers to a set of organizational values and practices that support and nurture development within a nonprofit organization.**

In her book, Strategic Fund Development, Simone Joyaux, ACFRE, writes that organizations that can answer “yes” to the following have a “culture of philanthropy.” She adds that when this type of culture is in place, “each volunteer and every employee feels it. Clients and donors recognize it whenever they connect with the organization.”

**Culture of Philanthropy**

* Most people in the organization—across board and staff positions—act as ambassadors and engage in relationship building.
* Everyone promotes philanthropy and can articulate a case for giving.
* Fund development is viewed and valued as a mission-aligned program of the organization.
* Organizational systems are established to support donors.
* The executive director is committed and personally involved in fundraising.

The ability to foster and develop a culture of philanthropy is essential to an organization’s success. Individuals’ beliefs and perspectives cannot be at odds with its principles. In other words, a culture of philanthropy has little chance of taking hold when people think asking for money is distasteful or just hate doing it. In *UnderDeveloped*, a CompassPoint study of fundraising challenges, respondents—especially in smaller nonprofits—reported low levels of engagement in fund development among their staff and board. If board members don’t adopt this major shift in thinking and come to embrace fund development as a central and valuable part of board work, rather than an unpleasant distraction, fundraising success will continue to elude too many organizations.

See UnderDeveloped: A National Study of Challenges Facing Nonprofit Fundraising by Jeanne Bell and Marla Cornelius, CompassPoint Nonprofit Services, 2012.

**How Do We Get There?
Suggested Practices to Foster a Culture of Philanthropy**

* Have workplace discussions about what people give to, what they volunteer for & why. Recognize everyone’s philanthropy.
* Create opportunities for staff, board and volunteers to understand how money, mission and constituent engagement are all linked in achieving impact.
* Make an annual gift to your organization that is personally significant to you & your income. Ask everyone else to consider doing the same.
* Hold annual board orientations that include experiences in your programs, hearing from a donor, and training in cultivation and asking.
* Have board members and staff talk to donors outside of fundraising campaigns. Organize a thank-a-thon, so people get to know why individuals give money to the organization, what they care about.
* When donors ask to be taken off a list, their info updated, to discuss a concern, get it done and make sure that it becomes a part of their donor record so that other people understand the donor’s need and preferences.
* When the fundraising begins, involve clients, constituents, members. Give them opportunities to give back as donors and as solicitors.
* Take shaming and guilt tripping out of the fundraising process. Get comfortable with hearing ‘no’ ‘not now’ “I can’t”.
* Learn about different traditions of giving towards the common good.
* Have a board discussion on how your mission and work is a part of achieving the common good.

**Individual Board Members: Fund Development Plan**

Organization X’s annual budget consists almost exclusively of fundraising from individuals, foundations and corporations. In any given year, we must raise about $--------- just from fundraising alone. In order to maintain a successful fundraising campaign, all board members are expected to make their own personal gift and to participate in some of the activities of donor development.

**Please complete this as your own fundraising plan, by confirming your personal gift, choosing the donor development activities you will participate in, and setting goals in those areas. Please make sure your plan is completed by the next board meeting.**

1. *Make a personal donation*. Board members of Organization X are each expected to make an annual gift in an amount that is personally significant to them. There is no minimum amount - we ask that you consider an amount that represents the largest charitable donation you would make in the year. To make this gift, consider pledging an amount early in the year, and making pledge payments to achieve this amount.

***My personal donation for 2018:*** $ ***\_\_***

1. *Provide a list of prospects for donor cultivation and solicitation.* The Development Director will work one-on-one with you to develop an effective strategy for inviting your family, friends or colleagues to support the work of Organization X.

**List of Prospects:** 1.

 2.

 3.

 4.

 5.

1. *Participate in donor meetings.* Many of our solicitations to major donors and prospects include a face-to-face meeting. Board Members can play a key role in these meetings, by sharing their reasons for supporting Organization X.

 **I am interested in attending donor meetings: YES NO**

The best times for me are:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. *Invite friends and family to participate in our Special Events.* This includes [name events] and selling tickets to such events.

**I will raise funds for the following:** EVENT NAME: **YES NO**

 EVENT NAME: **YES NO**

**I will sell tickets for special events:** EVENT NAME: **YES NO**

***My goal to raise through special events:*** $***\_\_\_\_\_\_\_\_***

1. *Make thank-you calls to donors and supporters.* This new program involves calling donors just to say “thanks.” It’s not a pitch for money, but just an opportunity to thank the donors for their support, answer any questions that they may have, and learn more about the donor. You will be given information and assistance to make these thank you calls.

 **I will make thank-you calls to donors and supporters: YES NO**

1. *Host a house party or invite a friend to host a house party.* House parties are used to educate our friends and donors about the services that Organization X offers, and is also an opportunity to raise money. By hosting a party, you underwrite the cost of food and drink, and open your home to the Organization X family.

**I am available to host a house party: YES NO**

Best time of year: Winter Spring Summer Fall

I have a friend that is available to host: **YES NO**

 The name of my friend is:

***My goal to raise through house party*** $***\_\_\_\_\_\_\_\_\_***

1. *Other ways to support fundraising.*

**I have expertise in the following areas:**  ­­­­\_\_\_\_\_\_

**MY OVERALL FUNDRAISING GOAL IS $\_\_\_\_\_\_\_\_\_\_**

**I’d like help in setting my fundraising goals- please contact me! YES NO**

**I agree to fulfill the above-stated fundraising goals to the best of my ability.**

Board Member Date

Board Chair Date

**Reflection & Next Steps**

1. What can you do in your chair role to foster a culture of philanthropy on the board?

2. What can you do in your chair role to support individual efforts?

3. What are your next steps to address the above?

**Suggested Reading from The Fundraising Authority:
(see electronic version of manual for links)**

* [*You Can Beg Your Board for New Names, or You Can Earn Them*](http://www.thefundraisingauthority.com/strategy-and-planning/earn-names-from-board/)
* [*The Four Key Fundraising Roles of Your Board of Directors*](http://www.thefundraisingauthority.com/strategy-and-planning/four-fundraising-roles/)
* [*The Simple, Step-by-Step Process for Getting Your Board to Refer New Prospects to Your Non-Profit*](http://www.thefundraisingauthority.com/strategy-and-planning/board-referrals/)
* [*What to Do If Your Non-Profit Board Won’t Help Fundraise*](http://www.thefundraisingauthority.com/strategy-and-planning/board-wont-fundraise/)
* [*How to Get Your Board Members to Give and Raise More Money Than Ever Before*](http://www.thefundraisingauthority.com/board-fundraising/)

**Notes**