Welcome to the Foundation Center’s

Your Board and Fundraising Webinar

We will begin shortly.

This Class Covers…

• The role of your board
• Various ways your board can participate in the fundraising process
• How to overcome board member concerns about fundraising
• Tips for strengthening your board, including recruitment and orientation

Part 1
The Role of Your Board

• Why boards are important
• Board responsibilities
• Effective boards
Why Boards Are Important

A governing board is defined as “people elected or appointed to establish policy, exercise fiscal responsibility and oversee management of an organization”

—Association of Fundraising Professionals

Board Responsibilities

• Legal and fiduciary responsibility
  – Includes fundraising responsibilities
• Oversight
  – Includes supervision of chief executive
• Strategic planning
• “Public face” of the organization
  – Outreach and advocacy
  – Represent constituent perspectives and viewpoints

For more information: http://boardsource.org

Three Duties of Board Service

• Duty of care: operating the organization ethically, according to the law
• Duty of loyalty (to the organization): avoiding conflicts of interest
• Duty of obedience (to the mission)
Characteristics of an Effective Board

- Commitment to the mission
- Strategic-thinking
- Independent-minded
- Transparent, acting with integrity
- Finding and sustaining resources
- Focused on results
- Committed to expanding the organization’s “circle of friends”

Part 2

Boards and Fundraising

- Financial contributions
- Board engagement

Giving Money

- Important first step to engage in fundraising
- External donors will look for board contributions
- Should you set a minimum donation amount?
Getting Money: Fundraising Activities

Once they've made their own personal contributions:

- One-on-one solicitations
  - Ask peers for support
  - Accompany staff on key visits to donors
  - Make introductions for staff to follow up
- Group settings
  - House parties
  - Service clubs, religious organizations, associations, etc.

Reality Check: Boards and Fundraising

So why aren't board members active in fundraising?

- Don’t know how
- Never had to before
- No one ever asked them to be involved
- No knowledge of the fundraising plan or what the goals are
- Afraid to ask people for money
- Too busy/too many other commitments

Turning it Around

- Dispel fears about money
  - Cultivation and stewardship play major roles
- Engage board members in planning process
- New board member “contract”
- Build fundraising skills through ongoing training
- Team approach—no one does this alone!
“But I Don’t Want to Ask for Money!”

Many other ways to get involved:
• Write thank you letters to supporters
• Contribute names to the prospect list
• Write personal notes on fundraising letters
• Cultivate and “nurture” donor prospects
• Solicit non-monetary donations
• Support special events
• Advocate for the organization
• Give time and expertise

Part 3
Tips for Strengthening Your Board
• Recruitment
• Commitment
• Board process

Fundraising Commitment Form
During this program year I pledge to participate in the fundraising effort of _____ in the ways indicated on this sheet.

<table>
<thead>
<tr>
<th>I will</th>
<th>I Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make my annual contribution</td>
<td></td>
</tr>
<tr>
<td>Host a dinner/reception/house party for prospective donors</td>
<td></td>
</tr>
<tr>
<td>Buy a table at the Spring Gala</td>
<td></td>
</tr>
<tr>
<td>Recruit eight people for the golf tournament</td>
<td></td>
</tr>
<tr>
<td>Provide ten names for the mailing list</td>
<td></td>
</tr>
<tr>
<td>Sign twenty thank you letters</td>
<td></td>
</tr>
<tr>
<td>Help organize an event</td>
<td></td>
</tr>
<tr>
<td>Join our Chief Executive or other fundraiser on a major donor call</td>
<td></td>
</tr>
<tr>
<td>Attend a workshop on fundraising</td>
<td></td>
</tr>
</tbody>
</table>

Name: ________________________________
Date: ________________________________
Recruiting New Board Members

Criteria for board selection:
- Commitment to the mission
- Having the time to commit
- Contacts in the community
- Personal wealth OR connection to others
- Desired skill-sets and experience (could include fundraising)
- Board diversity and community representation
- Ability to listen and "play well with others"

Recruitment: Where to Find New Board Members

- Referrals from current board members, executive director and other staff
- Prospects from existing donors and/or volunteers
- Prospects from the general population (check your local volunteer center for board matching programs)

For more information: http://pointsoflight.org
http://boardnetUSA.org

Board Processes

- Commitment--board “contract”
- Orientation
- Evaluation
Resources for Further Information

- Knowledge Base on GrantSpace.org
  - grantspace.org/Tools/Knowledge-Base/Nonprofit-Management/Boards

- BoardSource: Building Effective Nonprofit Boards
  - boardsource.org

- Creating the Future: Articles Library
  - help4nonprofits.com/H4NP.htm

- Board Café Newsletter
  - blueavocado.org/category/topic/board-cafe

- Free Management Library: Nonprofit Fundraising
  - managementhelp.org/boards/boards.htm