



BOARDS & FUNDRAISING

***3rd Annual Institute for Nonprofit
Governance***

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Boards & Fundraising

What do you want to know
about Boards and
Fundraising...?

10 Roles of the Board of Directors

- Determine the Organization's Mission and Purpose
- Select the Executive
- Support the Executive and Review His or Her Performance
- Ensure Effective Organizational Planning
- Ensure Adequate Resources
- Manage Resources Effectively
- Determine and Monitor the Organization's Programs and Services
- Enhance the Organization's Public Image
- Serve as a Court of Appeal
- Assess the Board's Own Performance



Fundraising Matters

*An effective fundraising program is the result of a successful **partnership** between board members and executive and development staff.*

Boards & Fundraising Policy

- Develop board policy regarding leadership giving and the board's role in fundraising
- Prospective and incoming board members - orientation and the job description includes fundraising
- Development committee of the board - discuss and approve a committee job description



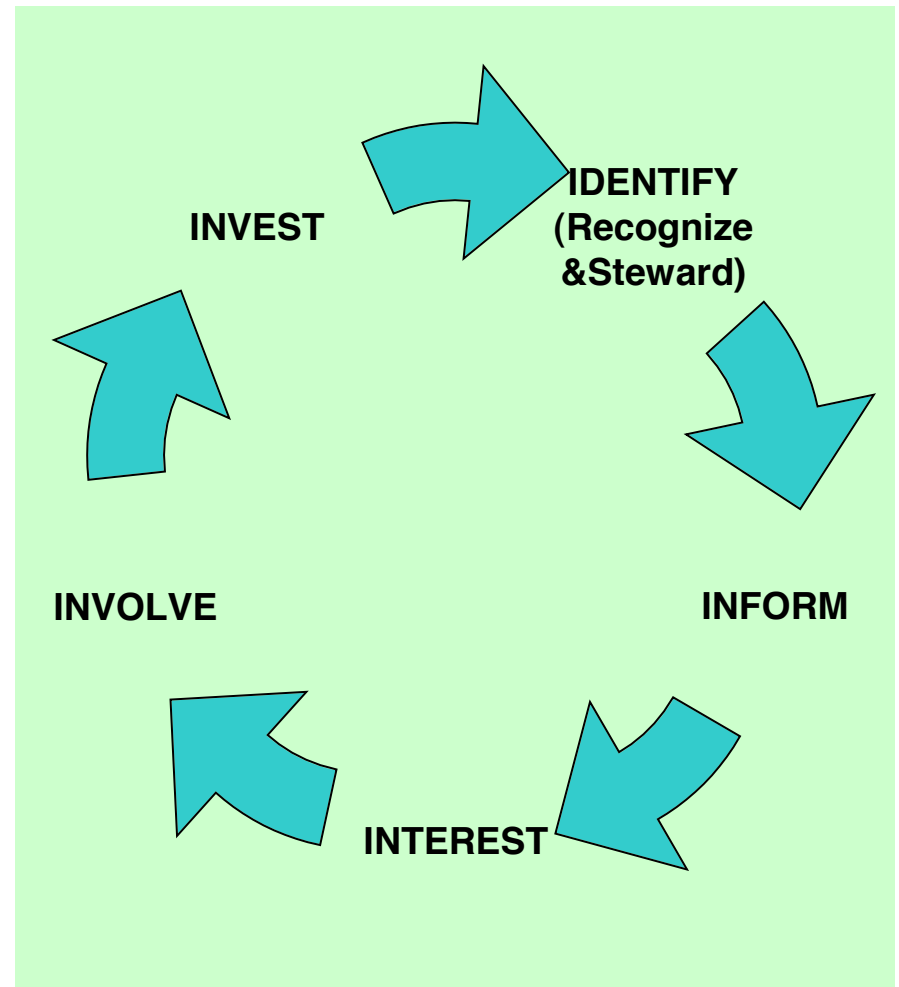


Boards & Fundraising Planning Process

- Review & refresh the ***mission/vision***
- Prepare and refine the overall organizational ***case statement*** and project/campaign case
- Board understands the ***fundraising process*** of prospect **qualification, cultivation, solicitation** and **stewardship**.
- Strengthen ***board skills*** to motivate people to action and engage new constituents and donors
- Work to build ***fundraising alliances*** among the board membership

Relationships, Relationships, Relationships...

- The Five I's
- Recognize & Steward
- Renewal
- Social vs. professional
- Who asks?





Boards & Fundraising Action & Strategy

- Get to know your board members ***passions and motivations***
- Determine if board members have ***linkages*** with foundation or corporate leaders
- Set ***standards and goals*** for the annual fundraising effort and regularly communicate the results
- Build involvement and ***excitement*** around unique organizational motivating factors

Boards & Fundraising Recognition

- Acknowledge and ***appreciate*** board involvement in fundraising - to the member personally and with their peers
- Build ***fun and competition*** into the process – contests, challenges, matching, etc.
- ***Celebrate*** success





Specific Actions for Board Members

- **CONTRIBUTE** to achieve 100% Board participation
- Participate and endorse **STRATEGIC PLANNING**
- Understand and endorse **DEVELOPMENT PLANS**
- Help identify and evaluate **PROSPECTS**



Specific Actions for Board Members

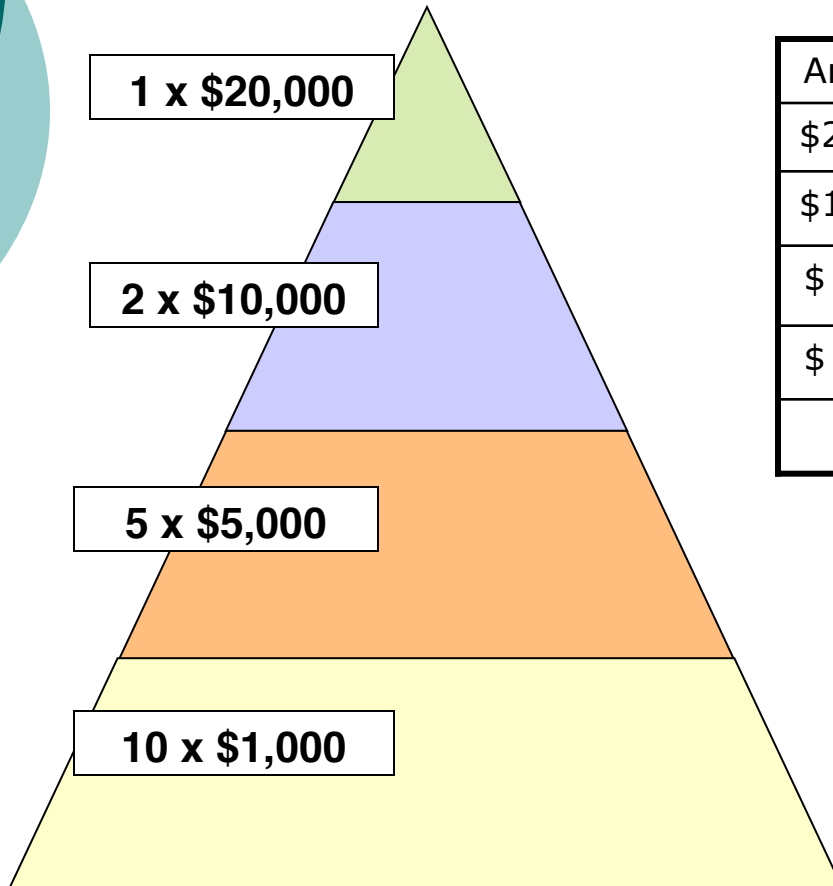
- Share in the **CULTIVATION** of key prospects
- Make **INTRODUCTIONS** to prospects
- Write notes on **ANNUAL APPEAL**
- Participate in **PHON-A-THONS**
- Help manage a **FUNDRAISING EVENT**
- Write **THANK-YOU LETTERS**
- **ACCOMPANY** others in the asking



Are You Ready for Fundraising?

- **Mission**: refined and agreed upon for the next 5 years
- **Board**: committed, giving, linked & trained
- **Case for Support**: compelling & urgent
- **Institutional Credibility**: leadership & follow-through
- **Internal**: staff, systems & prospects
- **External**: economic, psychological & competition

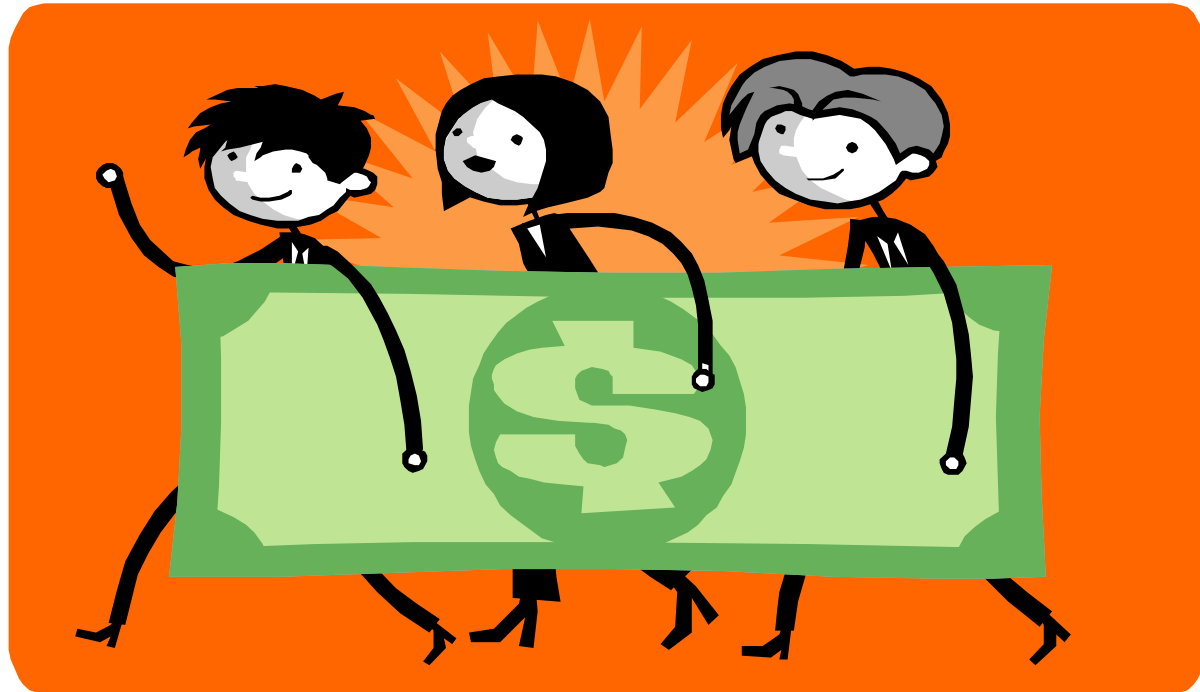
Your organization has a \$75,000 problem each year.....



Amount	# of Gifts	# of Prospects	Totals
\$20,000	1	3	\$20,000
\$10,000	2	6	\$20,000
\$ 5,000	5	15	\$25,000
\$ 1,000	10	30	\$10,000
	18	54	\$75,000



Together we can raise more!



Questions?