Today’s session will begin shortly!

Slides for today's session can be found here:
Housekeeping

Open and hide your control panel

Join audio:
- Choose “Mic & Speakers” to use VoIP
- Choose “Telephone” and dial using the information provided

Submit questions and comments via the Questions panel

Lori L. Jacobwith

- Master storyteller, fundraising trainer & coach
- 25+ years in social profit sector
- Since 2001 has helped organizations raise nearly $250 million from individual donors. And counting.
- Has changed the culture of more than 3000 organizations & their boards.
Where We Are Heading Today

What We Will Cover

1. The difference between fundraising and development.
2. Who is responsible for development outcomes?
3. When should the fund development discussion begin with board members?
4. What are ways the board can be involved & NOT have to ask others for money?
What We Will Cover

AND...

5. How to measure & share activity updates that will cause the board to be more engaged.

6. How to “train” the board to be an asset to your fundraising team.

7. Self Assessment: Pop Quiz!

What are Your Biggest Challenges With Your Board?
1. The Difference Between Fundraising and Development

**Fundraising**

*The raising of assets and resources from various sources for the support of an organization or a specific project.*

~ Source: AFP Fundraising Dictionary, (Association of Fundraising Professionals)
Development

The total process by which an organization increases public understanding of its mission and acquires financial support for its programs.

~ Source: AFP Fundraising Dictionary, (Association of Fundraising Professionals)

Everyone Is Busy

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Board Duties & Responsibilities

- Determine the Organization or Foundation Mission & Purpose
- Engage in Strategic Thinking and Planning
- Approve and Monitor the organization’s work
- **Ensure Adequate Financial Resources**
- Provide Effective Fiscal Oversight
- Ensure Sound Risk Management Policies

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Board Duties & Responsibilities

- Select & Support the Chief Executive and Review Their Performance
- Enhance the Organization's Public Image
- Carefully Select and Orient New Board Members and Board Leaders
- Maintain Board Structure and Operations
- Organize & Participate on Committees & Task Forces
2. Who is Responsible for Development Outcomes?

Development: Everyone’s job
Secret to Creating An Effective Board:

Communication
Communication
Communication

Support of all Kinds Moves Toward Boldness & Clarity of Communication
What People Want

Notice me
Like me
Touch me
Do what I say
Miss me if I’m gone

~ Seth Godin, Author & Marketing Guru

Board Communication

1. Includes listening.
2. It’s personal.
3. Provides meaningful feedback both ways.
4. Provides them with information and messages they want to share with others.
3. When Should The Fund Development Discussion Begin with Board Members?

Fundraising: Whose job is it?
Board: Identify & Recruit

- Know what you are looking for
- Set expectations early

Board & Volunteers: Identify & Recruit
When Using A Board Composition Matrix

Ask these questions*

1. What are the 3 most important things for our board to accomplish this year?
2. Do we have the right people on the board to make that happen?

*Source: Blue Avocado

What Exactly Do You Want From Board Members?

Provide Clear Direction
Ongoing Effectiveness

Ensuring the Future of (YOUR ORG NAME HERE)
Board Member Commitment Form – 20___

I recognize that our organization's vitality to change lives is fueled by our success in raising funds to support programs and operations. Likewise, as an accountable volunteer to the leadership, I acknowledge a personal responsibility to contribute to the success of the organization. This assistance, I have found, may take varying forms. Regardless of the nature, my contributions will be personally significant.

As a board member of ____________, I pledge to the organization and to my fellow directors, that I will fulfill the basic board member agreements and additional commitments I have indicated below.

Signed to the supporting and held accountable by my fellow directors in fulfilling my agreements.

BASIC BOARD AGREEMENTS: I agree to fulfill the following four (4) agreements:
- Make a financial contribution as a Board Friend at significant levels.
- Attend at least 90% of all board meetings.
- Serve on at least one (1) board committee.

ADDITIONAL BOARD COMMITMENTS: I agree to fulfill up to (5) additional volunteer hours by participation in fund development as noted on the following page.

Please return this form by: _________ (date)
Signed: _________ (date)

Ongoing Effectiveness

Fund Development Activities
Agree to fulfill additional hours to the following (see page):

1. Make a personal (minimum $5,000) financial contribution.
2. Coordinate a major fundraising gift at $50,000 or more, to be solicited by you and your network.
3. Attend 25 major fundraising events.
4. Visit 5 major development prospects.
5. Participate in the planning and implementation of at least one major annual fund campaign.

ANNUAL CAMPAIGN:
- Make at least one solicitation of $10,000 or more.
- Assist in the planning and implementation of the annual fund campaign.

EVENTS:
- Participate in the planning and implementation of at least one major annual event.

Please return this form by: _________ (date)
Signed: _________ (date)
Kicking Into High Fundraising Gear

Be clear about all duties & responsibilities, especially if they include helping with development activities.

*Reward them for helping!*
Give The Board Something To Talk About

What does it cost, per person, per week, per ?? to achieve that impact?

Stories of Your Impact

...create unforgettable emotional connections
Storytelling & Board Members

Board members & Storytelling; a powerful combination

[This link is case sensitive]

Message Pyramid

Understanding comes from the top down

Why you exist: The need for your organization
Your Money Story
Program messages
One person example

Conversations come from the bottom up
Ringing the Bell: Smith Family Foundation Pledges $500,000 to Health Center

We are thrilled to announce that the Richard and Susan Smith Family Foundation, located in Chestnut Hill, MA, has pledged $500,000 to help build a new community health center for Lowell. This gift represents the single largest campaign contribution to date.

Treat them as insiders. Share timely news. Both good and not so good.

What might be missing in your communication with your board?
Kicking Into High Fundraising Gear

Your Communication
You have a rare opportunity to empower board members to feel like superheroes.

To cause a connection that deeply aligns with their highest ideals and values.

What would a successful and fully engaged board look like?
Best Practices

“Thank and Release”

Annual Elections

Term Limits Are Your Friend

On The Board v. On Board

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Accountability…

“…is being held responsible for one's actions…

Four Necessary Ingredients for Holding People Accountable:

1. Establishing clear expectations;
2. Preparing people to meet those expectations with needed training and support;
3. Monitoring performance, and
4. Attaching consequences to the results

4. What are ways the board can be involved & NOT have to ask for money?
Ways to Participate in Development

1. Make a personal financial gift.

Ways to Participate in Development

2. Invite others TO GIVE time or talent.
   And for some of you even $.
3. Act as ambassador and advocate.

4. Thank recent happy donors.
Thanking: Timing is critical

Board Thank You Calls

Source: Donor Centered Fundraising, Penelope Burk & Cygnus Research
Is it worth getting your board excited to make those calls to raise that much more $$ & create more loyal donors?

Source: Donor Centered Fundraising, Penelope Burk & Cygnus Research
Ways to Participate in Development

5a. Participate actively in some aspect of raising awareness – *Share a story that paints a clear picture.*

5b. Raise awareness: Share updates about the campaign goal. Explain how a gift makes an impact.
Ways to Participate in Development

6. Hold each other accountable.

RECAP:
Ways to be involved with development

1. Make a personal financial gift.
2. Invite others to give something.
   Time, talent, stuff or even financial gifts.
3. Invite people in to the organization.
   Act as an “ambassador & advocate.”
4. Thank recent happy donors.
5. Participate actively in some aspect of raising awareness (story)
6. Share funding gap - how money makes an impact.
7. Hold each other accountable.
5. How to measure & share activity updates that cause the board to be more engaged?

Getting The Board ON BOARD

Remember when you reminded Shannon and I that moving forward with our board would take a little time but eventually they would “get it”? Last night at the board meeting they got it!!!

Last year at this time I asked for volunteers to make thank you calls, help me with presentations, contribute to CCRI financially, etc. One year ago- they wouldn’t look up from their paperwork, make eye contact, etc.

Last night..... Taaadaaa......
Together: Clarify & commit to duties & responsibilities of staff, board & volunteers especially to support development.

Measuring Success:

What measures does your organization have for the board?
What Information Do You Share to Cause The Board To Take ACTION?

### Nonprofit Dashboard Signal for Figures 1-6

**ACT**

1. **Finance**
   - **Target**
     - Days of unrestricted cash on hand: 45 days
     - Net surplus or deficit YTD (compared with YTD budget): $42,500 worse than budget
     - Government funding: $39,000 worse than budget
     - Days from end of month to financial statements: 24 days
   - **6 months ago**
     - Days of unrestricted cash on hand: 45 days
     - Net surplus or deficit YTD (compared with YTD budget): $28,000 worse than budget
     - Government funding: $3,200 worse than budget
     - Days from end of month to financial statements: 24 days
   - **Now**
     - Days of unrestricted cash on hand: 45 days
     - Net surplus or deficit YTD (compared with YTD budget): $28,000 worse than budget
     - Government funding: $3,200 worse than budget
     - Days from end of month to financial statements: 24 days

**WATCH**

**CELEBRATE**

### 5. Fundraising

- **Target**
  - New foundations or corporations: 10 this year
  - New individual donors: 100
- **6 months ago**
  - New foundations or corporations: 5
  - New individual donors: 10
- **Now**
  - New foundations or corporations: 6
  - New individual donors: 11

Source: Blue Avocado A Nonprofit Dashboard & Signal Light for Boards

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**Bonus Material**

<table>
<thead>
<tr>
<th>Sample board job description</th>
<th>Adapted from Good Boards for Smart Groups</th>
<th>by Andy Robinson, Emerson &amp; Church, 2006</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>What board members provide</strong></td>
<td><strong>What board members expect in return</strong></td>
<td></td>
</tr>
<tr>
<td>1. I will give my best effort to &quot;hit the ground running&quot; when beginning my service with the board.</td>
<td>1. The organization will provide me with a solid orientation, including background information on work accomplished to date.</td>
<td></td>
</tr>
<tr>
<td>2. I will learn about the organization's mission and programs, and be able to describe them accurately.</td>
<td>2. The organization will provide me with relevant materials and information.</td>
<td></td>
</tr>
<tr>
<td>3. I will attend at least one annual board meeting, the understanding that there are potentially successful strategies that are not currently being discussed.</td>
<td>3. I expect board meetings will be well run and productive, with focus on decision-making and not merely operational. I understand that agendas will be distributed at least one week in advance; I try to add items to the agenda. I will attend the chair at least two weeks in advance.</td>
<td></td>
</tr>
<tr>
<td>4. I accept full responsibility for the organization and will ensure its financial health and integrity.</td>
<td>4. I expect timely, accurate, and complete financial statements to be distributed at least monthly, and that I will be provided with the financial health of the organization. In addition, I also expect to be trained to read and interpret these financial documents.</td>
<td></td>
</tr>
<tr>
<td>5. I will provide oversight to ensure that our programs run effectively.</td>
<td>5. I expect monthly reports from the executive director, program updates, press clippings, etc.</td>
<td></td>
</tr>
<tr>
<td>6. I accept ethical responsibility and will help to build an ethical culture and the expected behavior to ensure that our programs run effectively.</td>
<td>6. The organization will provide me with relevant training.</td>
<td></td>
</tr>
<tr>
<td>7. I will serve as an advocate in the community to educate others and promote our work.</td>
<td>7. I will need materials and easy access to training, guidance, speaking, etc. to do this job effectively.</td>
<td></td>
</tr>
<tr>
<td>8. I commit to increasing my skills as a board member.</td>
<td>8. I expect to be provided with appropriate training and support.</td>
<td></td>
</tr>
<tr>
<td>9. I am open to participating in fundraising to ensure that our organization has the resources it needs to meet its mission. I commit to making a personal donation; our organization will be one of the top three charities I support each year that I am on the board.</td>
<td>9. I will be able to discuss future potential strategies for fundraising activities, and expect relevant training and support to help me fulfill my obligation. I will have the opportunity of fulfilling a personal pledge to money or quarterly investments, if so choose.</td>
<td></td>
</tr>
<tr>
<td>10. I will evaluate the performance of the executive director.</td>
<td>10. This evaluation will be based on goals developed jointly by the board and the E.D.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Board member signature</th>
<th>Date</th>
<th>Board chair's signature</th>
<th>Date</th>
</tr>
</thead>
</table>

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Kicking Your Board Into High Fundraising Gear
- Charity How To

Individual Giving by Category ($)

Individual Giving by Category (# of donors)

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Even Better

Prorated 2013 Fundraising as of November 1

<table>
<thead>
<tr>
<th>Annual Goal</th>
<th>Prorated Goal</th>
<th>Actual</th>
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</thead>
<tbody>
<tr>
<td>$381,000</td>
<td>$317,600</td>
<td>$270,510</td>
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<tr>
<td>$100,000</td>
<td>$46,990</td>
<td>$110,490</td>
</tr>
</tbody>
</table>

Your Organization Name Here

Governance Scorecard

Board & Committee Attendance

Board Gifts and Fledges

Annual Donor Contacts by Board

Board Member Event Participation

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35
Importance of Partners

Who on the board is your partner to ensure expectations are met?

6. How to “train” the board to be an asset to your fundraising team?
Rate Your Board Orientation

Board Orientation Checklist

Key areas to focus on:
- One hour initial meeting
- Peer to Peer orientation
- Program location for orientation meeting
- Orientation packet
Board Orientation Checklist

More:

- Infuse your mission into meetings.
- Personal phone call or meeting with a predetermined “board buddy.”
- Follow-up personal contact after first three months of board service.

Ongoing Training

In addition to orientation, at least once a year, schedule and provide deeper “training” on one area of board governance.

Today’s Topic: Risk Management & Boards
Board Training Topics

- How to tell our story powerfully.
- What is our money story & how to talk about it?
- What is risk management & why do we need to manage it?
- Reading financials so they make sense.
- What are good board recruitment tactics?
- What is governance?

The Best Way to “Train:”
Use Recognition to Get Results

David Novak, CEO Yum Brands

Source: Fortune Magazine July 25, 2013
7. Self-Assessment: Pop Quiz
How To Engage Your Board

1. The board signs an annual board agreement clearly spelling out participation expectations.

   YES or NO

Self Assessment

2. Our board members know they are expected to assist with fund development efforts in some way and DO.

   YES or NO
Self Assessment

3. I am certain our staff *(if we have staff)* provide good quality, information, data and support to our board to cause them to powerfully assist with fund development.

YES or NO

Self Assessment

4. 100% of our board members make an annual financial gift.

YES or NO
Self Assessment

6. We regularly share with our board compelling stories about a single person impacted by our programs and our work.

YES or NO

What Will You Do Next?
Resources

Listen: My Perspective on Board Recruitment & Retention
http://tinyurl.com/7uurtub

Six Steps to Exceptional Nonprofit Boards
http://tinyurl.com/6tzftk

10 Stop Signs on the road to Board Recruitment
http://tinyurl.com/5amwtx

Little things add up to something big
Ensure engagement by paying attention to details
http://tinyurl.com/7qr5t24

Enlist Your Dream Board by Gail Perry
http://tinyurl.com/7xu6z9r
Questions?

Kicking Your Board Into High Fundraising Gear

Take the short survey and have a great day!

Thank you!!

Slides & support materials here: