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

Fundraising Commitment Form

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

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

Name: ________________________________
Date: ________________________________

Part 3
Tips for Strengthening Your Board
• Recruitment
• Commitment
• Board process
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
As a board member of the _______________________, I am fully committed and dedicated to the mission and have pledged to carry out this mission. I understand that my duties and responsibilities include the following:

1. I am fiscally responsible, with other board members, for the organization. I will know what our budget is and take an active part in reviewing, approving, and monitoring the budget and fundraising to meet it.

2. I know my legal responsibilities for this organization and those of my fellow board members. I am responsible for knowing and overseeing the implementation of policies and programs.

3. I accept the bylaws and operating principles manual and understand that I am morally responsible for the health and well-being of this organization.

4. I will give what is for me a substantial financial donation. I may give this as a onetime donation each year, or I may pledge to give a certain amount several times during the year.

5. I will actively engage in fundraising for this organization in whatever ways are best suited for me. These may include individual solicitations, undertaking special events, writing mail appeals, and the like. I am making a good faith agreement to do my best and to raise as much money as I can.

6. I will actively promote _______________________ and encourage and support its staff.

7. I will attend board meetings, be available for phone consultation, and serve on at least one _______________________ committee. If I am not able to meet my obligations as a board member, I will offer my resignation.

8. In signing this document, I understand that no quotas are being set and that no rigid standards of measurement and achievement are being formed. Every board member is making a statement of faith about every other board member. We are trusting each other to carry out the above agreement to the best of our ability.

Signed ________________________________________________ Date _____________________

BOARD MEMBER

Signed ________________________________________________ Date _____________________

BOARD CHAIR

Tracking Board Fundraising Performance

Distribute the form below or ask board members to create their own form at the beginning of the year. Ensure accountability by giving it back to them at the end of the year and ask them to note which items they completed.

**Fundraising Commitment Form**

During this program year I pledge to participate in the fundraising effort of _____ in the ways indicated on this sheet:

<table>
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Name ________________________________________________________
Date ________________________________________________________

Your Board and Fundraising: An Introductory Course Webinar

Resource List

INTERNET RESOURCES

The Foundation Center's GrantSpace: Knowledge Base Articles on Nonprofit Boards (grantspace.org/Tools/Knowledge-Base/Nonprofit-Management/Boards), including “What is the board’s role in fundraising?” (grantspace.org/Tools/Knowledge-Base/Nonprofit-Management/Boards/Boards-and-fundraising)

The Foundation Center's GrantSpace: Boards Skill Area (grantspace.org/Skills/Boards)

BoardSource: Building Effective Nonprofit Boards (boardsource.org)

Help4Nonprofits: Nonprofit Library (Help4nonprofits.com/H4NPhtm)

Board Café Newsletter (blueavocado.org/category/topic/board-café)

Free Management Library: Complete Toolkit for Boards (managementhelp.org/boards/boards.htm)

BoardnetUSA.org (boardnetusa.org) allows individuals to find boards on which to serve and for nonprofits to find potential board members for free.

Hands on Network (handsonnetwork.org) Use their nationwide directory of Action Centers to find a volunteer center near you that could help with board matching.

PRINT RESOURCES

Available at the Foundation Center and its nationwide network of over 400 libraries (for locations, grantspace.org/Find-Us):