



## **Nonprofit Day Erie October 24, 2017**

*"Bored Fundraising or Board Fundraising: what do you want ... and how do you get it?"*

### **Learning objectives:**

1. Develop a philanthropically intentional board with vision, expectations and consequences
2. Maximize the philanthropic effectiveness of the board
3. Maintain a philanthropic head of steam among the board members

**Presentation description:** "Board or Bored" tackles the challenge of meaningful participation by board members in the philanthropic enterprise of your organization. The issues to be covered will be: 1) What is the purpose of your board, anyway? 2) What does it look like when philanthropy plays a significant role in your board's purpose? 3) How can your board maximize its philanthropic impact? 4) The importance of the case for support. 5) Where does the CEO/ED want the organization to go? 6) What opportunities exist to train your board in philanthropy?

### **Presentation notes:**

#### **1. Personal assumptions:**

- a. Volunteerism is a good thing, and the more one can volunteer without it harming higher priorities (such as family and church), the better for that person
- b. "It is more blessed to give than receive"
- c. Impactful fundraising requires a hands-on knowledge of both the mechanics and principals of philanthropy, and who they work together. Not everyone is "wired" to grasp both
- d. Individuals should only join boards they can support, in an exemplary way, with their time, talent and treasure
- e. Individuals shouldn't join boards with the intention of getting some material gain from their membership

#### **2. What is the purpose of your board?**

- a. To ensure the sustainability of the non-profit's mission
- b. The non-profit belongs to the community and board members are community stewards

### **3. Some legitimate roles of the board:**

- a. Governance
- b. Shouldered responsibility and oversight
- c. Expertise: finance, facilities, legal for example
- d. Providers of services: printing for example
- e. Fundraising

### **4. What does it look like when philanthropy is a significant role of the board members?**

- a. Organizing for fundraising is intentional, but unfortunately this intentionality is lacking in many non-profits
- b. Begin by identifying what type of gifted-ness and community representation is desirable for board membership
- c. Continue with stated expectations, i.e. a job description
  - i. Attendance
  - ii. Giving: time, treasure and talent
  - iii. Committee participation
  - iv. Advocacy
  - v. Influence
- d. Continue with stated consequences for not meeting expectations.
  - i. There can be a failure to lower or eliminate consequences due to feelings and fear
  - ii. Failed expectations hurt the individual board member, the board and the organization as a whole

### **5. Maximizing the board's philanthropic impact through meaningful engagement**

- a. Fundraising activities of a non-profit:
  - i. Annual giving
  - ii. Special events
  - iii. Sponsorships
  - iv. Grant writing (minimal interaction with board members)
  - v. Major Gift portfolios
  - vi. Planned giving
- b. Common complaint: board/committee members won't help out, do their assignments
  - i. Organize around accountability and be prepared to expect it
  - ii. Unreserved buy-in from the nonprofits leadership
- c. Where can board members do the most good: Development Committee or Major Gifts Committee, Sponsorship Committee, Special Events Committee?
  - i. Match the assignment with the board member's strengths

- d. Identifying and recruiting the best committee members and leader:
  - i. Attributes of top Major Gifts Committee members: affluence, influence and ownership of the process
  - ii. Always aim for the best: “who would make up our ‘dream team’?”
- e. Committee meetings are not report meetings:
  - i. Reporting is primarily to build confidence in the work yet to be done
  - ii. Report on progress with last meeting’s assignments
  - iii. Educate, orientate and train
  - iv. Agree on assignments
- f. The first Committee meeting for orientation and review of expectations:
  - i. The message is best delivered by a committed, bought-in board leader rather than the CEO/ED or DoD
  - ii. The meeting leader must “mean business”; most people naturally gravitate to the short cuts and the easy way out.
  - iii. Is the cause worth “going the extra mile”?
- g. Future meeting agendas:
  - i. Reviewing the Case for Support
  - ii. Identifying prospects
  - iii. Strategizing solicitations
  - iv. Reporting on progress with homework assignments
- h. In-house follow-up with assignments given:
  - i. Email action plan and to-do list
  - ii. Follow-up phone calls and emails to check on progress

## **6. A word about the importance of the Case for Support**

- a. The development of the Case is one of the most important activities for the Committee and the organization
- b. Working on the Case prepares and warms-up the Committee members to do fundraising work
- c. Contents
  - i. Who you are and in what ways are you distinct and different?
  - ii. Where you’ve been?
  - iii. What you’ve accomplished?
  - iv. What are your demonstrable and specific needs?
  - v. Why the needs are compelling and urgent?
  - vi. What is your vision for the future?
  - vii. What are the challenges to realizing that vision?
  - viii. What is your organization’s plan (specifically and in detail) to overcome those challenges?
  - ix. What is the fundraising plan to help overcome those challenges?

7. A good question: where does the CEO/ED want the organization to go?
  - a. Taking the organization to the next level: “better serving more people”
  - b. The CEO/ED as a hindrance to “better serving more people”:
    - i. Is the CEO/ED driven by self-service, self-importance, mediocrity, fear, has he/she run out of steam, treading water, waiting for retirement?
8. Board training in philanthropy
  - a. The goal: to get board members to think about philanthropy frequently and to become accustomed to the whole enterprise
  - b. The DoD as other than a “go-fer” or toady
    - i. If permitted, the DoD as the resident expert
  - c. DoD attends and reports at Board meetings (“mission moments”)
  - d. Mission moments by fundraising/development professionals, staff members or successful leaders from other organizations
  - e. The Board retreat as a venue for philanthropy training
  - f. Taking advantage of **carefully vetted** board-related seminars, conferences and events offered by the Nonprofit Partnership and other institutions

**Bio:** Ted Wood, president of Ted Wood & Associates, began his fund-raising career in 1982 with Ketchum, Inc. as senior campaign director and then as vice president of campaign supervision and director training. Following 11-year tenure with Ketchum, Ted joined the University of Pittsburgh to direct the university’s campaigns. He later headed-up Pitt’s major gifts program and supervised the foundation, corporation, planned giving and donor research operations. In 1996, Ted established himself as independent fund-raising counsel for a variety of non-profit organizations.

During his 35 year career, Ted has directed and supervised fundraising projects for over 200 non-profits. Since 1997, he has provided fundraising counsel to 25 organizations in Northwest Pennsylvania.

Ted received his undergraduate degree from the College of William and Mary and graduate degree from the Virginia Theological Seminary. His wide-ranging experience includes study abroad in Israel and Canada, campaign supervision in Canada and Great Britain and lecturing at regional fund-raising conferences and to graduate classes at the University of Pittsburgh and Mercyhurst University.

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