Involve your board members in fund development… and raise more money!

Land & Water Conservation Summit | Saturday, March 9, 2013

Session overview

Yes, you can successfully involve your board members in fund development. Board members can help your organization reach the Holy Grail of fundraising, donor loyalty. This isn't easy – but it's not as hard as you might think.

Where do you start? Top-notch organizations build effective boards by understanding and doing governance – and by recruiting the right board members to do the right work. This is the concept of corporate governance, whether in the for-profit or nonprofit sector.

But donations and fundraising are unique to the nonprofit sector. So we need a board that understands that angle in corporate governance. And we need board members who will participate in fund development work.

What does the board do for fund development? What can we reasonably expect individual board members to do in fund development? How do we identify and screen candidates for board membership who are prepared to help with fund development?

You can learn easy secrets to success. You can learn harder secrets, too. Use these proven strategies and you and your board members will build a stronger organization and raise more money.

Postscript

By the way, if you want to involve your board and board members in fund development, put on your organizational development hat. You can't just be a great fundraising technician – you have to be an organizational development specialist. The reality is, involving people in fund development is not so much about fundraising… it's about everything else. Things like your board member recruitment process, fear and overcoming fear, teaching… and so much more.

To learn more about operating as an organizational development specialist, read the monograph posted in the Free Download Library on my website: *Choosing Your Road*. Also, see the chapter on the fundraising professional in the 3rd edition of my book *Strategic Fund Development,* published by John Wiley & Sons in March 2011.

Resource materials: fund development and board development
- *Keep Your Donors: An Essential Guide to Better Communications and Stronger Relationships,* Tom Ahern and Simone Joyaux. 2008.

- *Strategic Fund Development: Building Profitable Relationships That Last, 3rd edition.* 2011.

- *The Ask* by Laura Fredricks

- All of Tom Ahern's books: *Raising More Money Through Newsletters Than You Ever Thought Possible* and *How To Write Fundraising Materials that Raise More Money; How to Write Fundraising Materials That Raise More Money; Seeing Through A Donor's Eyes.* Subscribe to Tom's free e-news, too. And check out the real-life critiques on his website.

- Subscribe to www.theagitator.net and www.futurefundraisingnow.com.

- Fund development books by Ken Burnett, Adrian Sargent, Laura Fredricks, Mal Warwick, Kay Sprinkel Grace, Ted Hart.

- Read the *Nonprofit Quarterly*, it's online articles and columns and the print publication. www.nonprofitquarterly.org. Check out my NPQ web column "Unraveling Development."

- Subscribe to my weekly homepage blog Simone Uncensored and my free monthly e-news. www.simonejoyaux.com.

- Read John Carver's *Boards That Make A Difference* and Chait et al's book *Governance is Leadership.*

In January 2013, I began my 26th year as a fulltime consultant, serving all types and sizes of organizations. I'm an expert in fund development, strategic planning, and governance/board development. Before starting my consulting practice, I was an executive director (with no development officer), and then the chief development officer of a larger institution.

Along the way, I made a name for myself as a teacher. I've presented all over the world – in Australia, New Zealand, Italy, Geneva, Mexico City, Paris, Italy, The Netherlands, and throughout the U.S. and Canada. I'm a faculty member in the Masters Program in Philanthropy and Development at Saint Mary's University of MN. I've written two books, written chapters in three other books, and write regularly for the *Nonprofit Quarterly*. I have a very active website with lots of free resources, www.simonejoyaux.com.

As a volunteer, I serve regularly on boards and founded the Women's Fund of Rhode Island. My life partner and I have bequeathed our entire estate to charity.

WORKSHOP AGENDA

1. **Starting at the real beginning**

   A. What's the role of the body of knowledge in this work? Who possesses – and communicates – the body of knowledge? Who is the expert? What body of knowledge do you need to engage board members in fund development? Corporate governance. Enabling/leadership. Fund development. Organizational development.

   B. Questions, always! But qualified opinions only, please. Explain that to your boss and board.

   C. Most fundraising problems are not fundraising problems. What does that mean?

   D. What do you mean, "the board is responsible for fundraising and the success of the organization?" Is anyone else responsible? How is that responsibility the same? When is it different?

   E. What are the fundamental principles that all board members (and staff for that matter), should understand about philanthropy and fund development? And who tells them?

2. **Your current scenario . . . why aren't they involved already?**

   A. Why do you want strong ownership of fund development? *Because it raises more money. Because shared understanding and ownership build strong systems and organizations. Why?*

   B. Why aren't your board members and other volunteers already involved? *What barriers need to be overcome? Who is responsible for overcoming the barriers? Staff is, primarily/*

   C. What's the difference between the board, the development committee and the board member? *There's stuff for the board to do at its meetings. But what do you do with individual board members outside meetings? How do you get them individually and personally involved?*

   D. Key point! Based on my experience and observation, the real reason that board members are not involved in fund development is because staff does not enable volunteers well. When you wonder why your board members are not involved, look first in the mirror.
      - Handout on enabling, pages 6 – 7. By the way, enabling is what the executive director does with the board to ensure good governance.

   E. **A REALLY BIG POINT** – or perhaps a **REALLY BIG QUESTION**: What have we done, as fundraisers, to promote myths and reinforce less-than-appropriate fund development strategy?
      - Handout, Basic Principles of Fund Development, pages 8 – 9 (For you to review back home.)

3. How do you involve board members (or any other volunteers) in fund development?

   A. First, this is an organizational development issue, not a fund development issue.

   - Most fundraising problems are really organizational development problems. If you're an organizational development specialist – not just a fundraising technician – it's easier to identify these problems and address them.

   - Ask yourself (and your board members and other volunteers!): Why are they not involved? What are the barriers? Are these really fund development barriers or organizational development barriers? What knowledge and skills do you need to address these organizational development barriers / issues?

   - See monograph on my website: *Choosing your road: are you an OD specialist or just another fundraising technician?* (Click on Resources and visit the Free Download Library | Fund Development section.) For further exploration, see *Strategic Fund Development: Building Profitable Relationships That Last, 3rd edition,* released in March 2011 from John Wiley & Sons. This expanded edition includes chapters on the fundraising profession, the art of leadership, and more.

4. What does it mean to involve your board and board members in fund development?

   A. Create a minimal level of understanding, e.g., of importance of their participation in philanthropy and fund development, and the basics of fund development. Build ownership and buy-in. Make sure your board members understand and accept this information. *That's part of your orientation and training and enabling job as a staff person. Remember: It's about process first. Get their participation in process. Then focus on tasks.*

   B. Make it "easier" or at least "less worse" for them! *That's a staff job, too. Enabling! Effective volunteer participation in fund development will <u>not</u> happen without effective staff enabling.*

5. The next beginning…understanding corporate governance and board member performance

   A. Start with the shared understanding of the board, committee, and board member role in fund development. Set the expectations at the start. Then hold everyone accountable.

   B. Corporate governance is corporate governance. Use the body of knowledge. Distinguish between the collective (the board) and the individual (the board member). Define and enforce standards. *Remember that corporate governance only happens when the board is together at its board meetings.*
   - Handout: Basic principles of governance, page 10
   - Handout: Job description/role of the board, page 11
   - Handout: Performance expectations of the individual board member, page 13

   C. Define what you mean by the "right" board members. *I don't mean moneyed, connected ones!*

   D. Strengthen the board member recruitment process. Define behaviors required of all board members. Identify skills needed without the group, based on the board job description (which is the same for all organizations!) Conduct screening interviews – then decide if you'll invite the candidate to join the board.
   - See various handouts about board member recruitment on my website. Click on Resources and visit the Free Download Library.

6. Strategies for engagement . . . I've used these and they work.

A. Establish a fund development committee of the board, chaired by a board member, staffed by the development officer. *Use this mechanism to help do everything else. This is your think tank, your leadership team, your strategy group.* (See handout on page 12.)

B. Build a culture of philanthropy in your organization.   (See handout on Joyaux website: Resources | Free Download Library)
- *Talk about philanthropy, organizational culture and ethics. Do this at board and committee meetings.*

- *Try Simone's complain and whine session. This is engaging, illuminating, and informative. Also, somewhat amusing… and that's good.*

- *Talk informally with individual members. Ease them through process and tasks.*

- *P.S. Don't try to sell fund development as "fun"! Just aim for "less worse".*

C. Conduct an assessment process for your development operation.
- *Figure out where you are now and <u>together</u> create a vision of where you want to be.*

- *Get a development audit tool and modify it for your agency's use.* See an old example on Joyaux website. Check out Guy Mallabone's development audit manual. Ask your colleagues for examples.

- *Measure your organization's DCQ (donor*-centric quotient). Use Ahern and Joyaux *Donor Centric Pledge* posted on Joyaux website.

D. Assess your board members. (Handout pages 14 – 15)
- *You might be pleasantly surprised – or not. Either way, you have information to decide next steps.*

E. Articulate the key messages in your organization's story (the case for support) together. (See handouts on Joyaux website. Visit Resources | Free Download Library.)
- *No, staff doesn't just draft it. Engage your board members (and other volunteers and even donors!) in conversation.*

F. Engage board members in relationship building. *This is easier and less scary than asking for gifts.*

G. Partner board members with staff and other board members – to do various things, e.g., relationship building and solicitation.

H. Set goals and create the fund development plan together. (See handout on Joyaux website. Click on Resources and visit the Free Download Library.)
- *Staff doesn't just provide a draft for review. See sample plans and an entire chapter devoted to fund development planning in my book Strategic Fund Development: Building Profitable Relationships That Last, 3rd edition.*

I. Provide orientation and training opportunities. *The annual face-to-face solicitation orientation and role-play. An overview of fundraising fundamentals. An annual retreat on fund development. Many opportunities!*

J. Provide a menu of choices (and requirements) annually. *Sign up each board member through a personal conversation.*

Enabling | What volunteers should expect of staff

Originally described in detail in the 2nd edition of *Strategic Fund Development: Building Profitable Relationships That Last.* Expanded and updated in the 3rd edition published by John Wiley & Sons in March 2011. This handout includes the expanded and updated enabling functions, fully described in the 3rd edition.

Use these enabling functions to strengthen your fund development and governance. Use these enabling functions with your own staff, too.

Enabling functions

1. Transmit the organization's values.

2. Engage volunteers in the meaning of your organization.

3. Articulate expectations and clarify roles and relationships.

4. Respect and use the skills, expertise, experience and insights of volunteers.

5. Engage volunteers in process as well as tasks.

6. Provide direction and resources. Explain why not just how. Identify and remove barriers, and help develop skills.

7. Coach and mentor people to succeed.

8. Transmit the body of knowledge and best practice, helping others anticipate next practice. (And this includes helping people distinguish between unqualified personal opinion and the body of knowledge.)

9. Communicate – which includes helping people transform information into knowledge and learning.

10. Encourage people to question organizational and personal assumptions and ask strategic and cage-rattling questions.

11. Engage people in meaningful conversation that produces learning and change.

12. Ensure quality decision-making.

13. Anticipate conflicts and facilitate resolution.

14. Encourage volunteers to use their power, practice their authority, and accept their responsibility.

15. Model behavior.

16. Manage

17. Create opportunities / strategies to buy more time to think things through. (Cohort 14, Saint Mary's University Philanthropy and Development Program)

18. Enhance attrition (and facilitate thank and release, if necessary).

19. Monitor, evaluate, and enhance enabling.

Enablers have the right <u>attitude</u>. Enablers:
1. respect and trust others;

2. are trustworthy themselves;

3. are comfortable with diversity and complexity;

4. welcome divergent opinions;

5. are flexible and comfortable with change;

6. commit to process as well as outcome;

7. appreciate conversation and disagreement;

8. share responsibility for success;

9. acknowledge responsibility for failure;

10. balance personal ego with egos of others;

11. persevere; and,

12. are patient.

Enablers possess essential <u>skills</u>. Enablers are:
1. organizational development specialists

2. proficient teachers and learners

3. effective communicators (listening, informing and helping to transform information into knowledge);

4. critical thinkers (anticipating problems, identifying solutions, and redirecting volunteer energies);

5. strategists (analyzing situations, identifying barriers and opportunities, capitalizing on strengths, and ensuring action and results);

6. comfortable with conflict and resolve conflict through shared power with as many individuals as possible; and,

7. effective motivators and can focus and manage people well.

Basic Principles of Fund Development

Philanthropy means voluntary action for the common good[1]. Fund development is the essential partner of philanthropy. Fund development makes philanthropy possible by bringing together a particular cause and the prospects and donors who are willing to invest in the cause. The goal is to acquire donors of time and money who stay with the charity. This is done through the process of relationship building. With the donor at the center, fund development nurtures loyalty and lifetime value, thus facilitating philanthropy. You know if your relationship building works because your retention rates rise and the lifetime value of your donors and volunteers increases. (From *Keep Your Donors: The Guide to Better Communications and Stronger Relationships*.)

So what does this mean in practical terms? Here are some basics:

1. First, understand some **basic distinctions**:
   a. Predisposed: An individual, business, or some other entity whose interests and actions suggest a possible inclination or susceptibility towards your organization's cause / mission. ("Suspect" is more common terminology. But who wants to hear anyone referred to in such a pejorative manner?)
   b. Prospect: An individual, business, or some other entity that has demonstrated an interest in your cause / organization. The individual has raised his / her hand by buying your services or asking to join the mailing list or... In some manner, in some way, the individual, business or entity has raised its hand signaling interest in your cause and your organization.
   c. Donor: An individual, business, or some other entity that has given a gift of time or money or service to your organization.

2. Nurture a **culture of philanthropy** in your organization. It's the right attitude that matters as much as anything. Culture refers to the personality / attitude of your organization. A culture of philanthropy means that everyone accepts and celebrates the beauty of philanthropy and donors, no matter the type or size of gift.

3. Build a **donor-centered**[2] organization. Focus on the donor or prospective donor. "It's not what your organization is selling, it's what I'm buying that counts. I'm interested in my interests, my motivations and my aspirations. Match those and then I'll give to you. Otherwise, leave me alone!" Don't universalize your own passion. Not everyone is interested in your cause, no matter how convincing you are. Do not try to convince them! That's offensive. Instead, find those who share your passion.

4. Giving is an **emotional act**, not a financial transaction. Your organization is the means by which donors live out their own interests and aspirations.
   a. Neuroscience and psychological research document that all human decisions are triggered emotions[3]. Then rationale steps in. "Emotion is multi-dimensional: it focuses on a person's core goals, directs attention and interest, arouses the body for action, and integrates social group and cultural factors. It is thus a central component of meaning making." (Carol Saunders, PhD, Brookfield Zoo)
   b. Research from the direct mail industry says that people give in response to one or more of 7 emotions: greed, guilt, anger, fear, flattery, exclusivity, and salvation. People move from one emotion – e.g., anger – to hope, by using your agency as the means to make change. Tom Ahern refers to this partnering of emotions as "twin sets."

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[1] Inspired by Robert L. Payton's definition of voluntary action for the public good. Payton was the first professor of philanthropics in the U.S. and former head of the Center on Philanthropy at Indiana University / Purdue University in Indianapolis.

[2] See Donor Centric Pledge in *Keep Your Donors* and at www.simonejoyaux.com. Click on Resources / Free Library / Fund Development / Relationship Building.

[3] See the research of Dr. Antoine Bechara and Dr. Antonio Damasio, described in Tom Ahern's books on donor communications. www.aherncomm.com. By the way, psychologist W. Gerrod Parrott identifies many more than 7 emotions. Read all about emotions in *Keep Your Donors: The Guide to Better Communications and Stronger Relationships,* by Joyaux and Ahern.

5. Engage **volunteers**, including board members and others. Make sure your staff effectively enables volunteers to participate in this meaningful work of identifying, cultivating, and soliciting.

6. **Don't trespass** on personal and professional relationships. Instead, use connections to identify those who might be predisposed to your cause. If you cannot qualify them as prospects (and it's their choice!), then leave them alone. Nurture relationships between prospects and your organization, getting them ready to be asked and asked again.

7. Effective fund development is like **permission marketing**[4]; people opt in or opt out. "Permission marketing is the privilege (not the right) of delivering anticipated, personal and relevant messages to people who actually want to get them…treating people with respect is the best way to earn their attention. Permission doesn't have to be formal but it has to be obvious." (from Seth Godin's book and blog)

8. More **visibility** does not produce more contributions. Everyone focuses on his / her own interests. Your agency can be more and more visible – but if I'm not interested, I'm not paying attention. And I sure won't send money. Just ask Simone about the NCAA basketball championship and the World Cup! (Or read about these experiences in *Keep Your Donors*.)
   a. It's okay if someone doesn't know who your agency is or what it does. Tell them, if they're interested. That's identifying the predisposed.
   b. Do not solicit someone unless you know for sure that the person knows about your agency.
   c. Where do you need to be visible? Among your current donors, because you want to build their loyalty. Absence does not make the heart grow fonder –it's out of sight and out of mind! Nurture these donor relationships.

9. *You* have to **give first**. (*You* means each board member, the CEO and development officers, and fundraising volunteers.) Why? Because you cannot represent an agency or cause without demonstrating your own financial and volunteer investment.

10. **Why do most people give**? Because they are asked. It's really that simple. But only ask those who are interested. Ask the right prospect for the right amount at the right time for the right project in the right way with the right solicitor.

11. Build an **individual giving program**. Each year, individuals give the largest portion of philanthropic gifts in North America. What about elsewhere? And individuals are more loyal donors than foundations or corporations.

12. Fund development is a **process and a profession** – founded on ethical principles and standards[5], based on a well-researched body of knowledge[6], and committed to protecting the public through voluntary certification of professionals. Personal opinion – without the body of knowledge – doesn't and shouldn't count for much.

13. Most **fund development problems** are actually not fund development problems. Most problems relate to other areas of operation. Fix the real problem. (See www.simonejoyaux.com and click on Resources / Free Library / Fund development / *Choosing your road*.)

14. A **balanced funding mix** of solicitation strategies and donor sources ensures stability and credibility. Whenever possible, the best way to solicit a gift is through face-to-face solicitation.

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[4] Term introduced by Seth Godin in his 1999 book *Permission Marketing*. Godin contrasts permission marketing to interruption marketing, the traditional advertising / marketing approach. You know, the billboards and glitzy ads - and sending me a newsletter that I didn't ask for. Instead, you identify the predisposed – those you suspect might have interests similar to your cause / organization – and introduce yourself (personally is usually best, e.g., through a cultivation gathering or one-on-one). Then, if the person (or corporation or foundation) expresses interest, that gives you permission.

Godin observes: "Rather than simply interrupting a television show with a commercial or barging into the consumer's life with an unaccounted phone call or letter [or in fundraising, the newsletter or a solicitation], tomorrow's marketer [and top notch fundraiser] will first try to gain the consumer's consent to participate in the selling process." [Bracketed comments are mine, not implied by Godin.]

[5] See the *Donor Bill of Rights* and the *AFP Code of Ethical Principles and Standards of Professional Practice* at www.afpnet.org. Or visit www.simonejoyaux.com, click on Resources, then visit the Education / Certification link.

[6] Visit CFRE International (www.cfre.org), the baseline certification for fundraisers worldwide. Click on the Test Content Outline, which describes the required knowledge for a fundraiser with 5 years of experience.

Basic principles of governance

Definitions
- Governance is the process whereby a group of individuals works as a collective to assure the legal and moral health of an organization.
- Governance is the process of due diligence whereby the board, as a collective, assures the legal and moral health of an organization.
- A board is the body that carries out the governance process to assure that an organization fulfills its legal and moral obligations to its constituencies.
- A board is legally and morally accountable for the health of the organization and the fulfillment of the organization's mission.

Basic principles

1. The board is a collective and only has authority as a group. The board is responsible for governance.

2. The board exists to gather together, talk about information vital to organizational health, and take action. This all happens together, as a group, through group dialogue, at board meetings.

   - An effective board understands this and so it establishes policies and procedures for conducting effective board meetings.

   - An effective board focuses on strategic issues rather than routine matters.

3. The board focuses on ends (e.g., results) and management focuses on the means to achieve the ends established by the board. (And of course the board establishes these ends through dialogue with management, as staff are the experts in the work of the organization.)

4. There is a different between governance and management – but there are also similarities and overlaps. The distinction is one of judgment and organizational evolution.

5. A board is responsible for various functions – and the board should be composed of individuals who have the skills and experience to help the board carry out these functions.

6. There is a difference between a board and an individual board member – and this difference must be made clear prior to nominating an individual for board service.

7. The board has a written job description for itself, accompanied by written performance expectations common to all board members. The board enforces both.

8. An effective board regularly monitors its own performance in governance – and assures that individual board member performance is evaluated annually.

It takes a lot of work and time and attention to develop a board. The executive director of the organization is principally responsible for providing the leadership and the knowledge. And if you are fortunate, you will recruit a few board members who are experienced in not-for-profit governance.

Role of the Board of Directors

Role of the Board[7]

The Board of Directors is legally and morally (ethically) accountable for the health and effectiveness of the organization. The Board ensures that the organization achieves its mission in an ethical, transparent, accountable, and prudent manner.

The Board's job is governance, the ongoing process of due diligence whereby the Board operates as a collective to assure corporate health and effectiveness. Specifically, the Board is accountable for the functions described below. The Board operates in a manner outlined in its policies.

The Board works in partnership with its CEO as articulated in various policies. The CEO provides leadership and support, enabling the Board to carry out its governance responsibility.

Board Functions | Scope of Authority

All of this is accomplished as a group – at board meetings – through review of information, strategic questioning, dialogue, and decision-making.

1. Articulate **values and mission**, and set **standards, controls, and policies**. Ensure that all the organization's programs, activities, and operations adhere to these policies.

2. Ensure that the organization is **relevant** to the community through processes that monitor the external environment and **define vision, direction, and strategy.**

3. Define and monitor key **areas of performance** compared to short- and long-range strategy / plans, assess **results**, and assure that steps are taken for continuous quality improvement in all areas.

4. Ensure that the **financial structure** is adequate for current priorities, long-range strategy, sustainability, and intergenerational equity.

5. Ensure that adequate **risk management** is in place, e.g., safety and security, insurance, data back-up, CEO succession, etc.

6. Determine eligibility for **Board membership**, assure proper recruitment of candidates, elect members and officers, and assure proper orientation and mentoring of Board members.

7. Define and enforce **parameters of the Board's work** including its committees / task forces and the role and performance of the **individual Board member**. Assess effectiveness.

8. Hire the organization's **chief executive officer**. Appraise his/her performance and set compensation; reward competence, or if necessary, replace the individual.

9. Ensure **compliance with relevant laws and regulations** affecting the organization.

10. Ensure **effectiveness of management**, without intruding in management's role and authority.

11. Provide candid **advice and perspective** regarding the organization's health and effectiveness and the marketplace environment, without compromising management's authority.

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[7] Inspired by Ken Dayton *Governance is Governance*, an Independent Sector monograph, www.independentsector.org

Role of the Fund Development Committee

Purpose of the Committee: As a committee of the Board of Directors, helps the Board carry out its due diligence function related to assuring fiscal health through philanthropy and fund development. Partners with staff to institutionalize the philanthropic process within the Board and its individual members, assuring a donor-centered organization.

Reports to: Board of Directors and takes direction from the institution's strategic plan

Staff to the Committee: Development Director (or executive director if there is no development officer)

Committee membership and operations: Members include both Board and non-Board members. All committee work is done in partnership with and through the leadership and enabling of assigned staff. The CEO makes all staff assignments. The committee does not usurp the authority of the Board, and neither directs nor oversees staff.

Frequency of meetings: As necessary, estimated at 6 times per year

Scope of work for the Fund Development Committee
1. Partner with the Governance Committee to assure appropriate articulation of roles and performance expectations in fund development (e.g., for Fund Development Committee, Board, individual board members).

2. Devise and recommend philanthropy and fund development policies and recommend to the Board for action, including any limitation policies.

3. Help nurture a culture of philanthropy throughout the organization, and assure that all donors of time and money are respected and honored.

4. Assure that the Board and individual Board members are adequately educated about the basic principles and best practices in fund development, including the design of a donor-centered organization.

5. Through the fund development planning process: help establish the charitable contributions goals for the annual budget; devise the annual fund development plan for action by the Board; and, recommend results and benchmarks for action by the Board.

6. Review results and evaluate return on investment (ROI) compared to plan. Identify trends and implications and engage the Board in strategic dialogue and decision-making regarding philanthropy and fund development.

7. Help the Board articulate the case for philanthropic support directed at specific audiences.

8. Establish task forces to carry out specific fund development activities. Monitor task force performance.

9. Provide personal follow-up to individual Board members to monitor their participation.

End of meeting questions (generally applicable to all committees)
1. What do we report to the Board, how and why?

2. What requires strategic dialogue with the Board? What kind of background information will we provide in advance and how will we set the context for the discussion?

3. How can we compliment the work of our Board colleagues?

4. What kind of personal follow-up with Board members and other fundraising volunteers is necessary? Why? Who will do what by when?

Performance expectations of you, the individual as a board member

Each Board member of our organization affirms the expectations outlined here and strives to perform accordingly. We treat all Board members the same when it comes to these expectations.

We clearly articulate these expectations during the recruitment process. We accept the candidate as a nominee or appointee only after s/he has agreed to fulfill these expectations. And, by accepting nomination or appointment, the individual confirms that this board service is one of his / her top volunteer and giving commitments.

Specific performance expectations are:

1. Believe in and be an active advocate and ambassador for the values, mission and vision of the organization.

2. Act in a way that contributes to the effective operation of the Board – and work with fellow Board members and staff to assure that the Board functions well. This includes – but is not necessarily limited to the following:
    a. Focus on the good of the organization, independent of personal agenda, self-interest, or influence of others.
    b. Support the organization's policies and procedures for conducting business.
    c. Maintain confidentiality of committee, board, and organization work unless authorized otherwise.
    d. Support Board decisions once these are made.
    e. Participate in professional development opportunities to strengthen corporate governance and advance the organization's effectiveness through learning. *(Thanks to Cohort 20, Saint Mary's University Masters Degree in Philanthropy and Development.)*
    f. Participate in appraisal of own performance and the performance of the Board and its committees.

3. Regularly attend Board and committee meetings. Prepare for these meetings by reviewing materials and bringing the materials to meetings. Use conversation as a core business practice, asking strategic questions and participating in dialogue.

4. Keep informed about the organization, its issues, and its connection to the community through active participation within the organization and outreach outside the organization.

5. Help support the charitable contributions operation of the organization. Specifically:
    a. Reach into diverse communities and help identify and cultivate relationships to support the organization as donors, volunteers, and advocates.
    b. Give an annual financial contribution to the best of personal ability[8]. If the organization launches a special campaign, give to that, too.
    c. Participate in fund development by taking on various tasks tailored to your comfort and skills.

6. As appropriate, use personal and professional contacts and expertise[9] to benefit the organization, without compromising ethics or trespassing on relationships.

7. Serve as a committee/task force chair or member. Be a prepared and active participant.

8. Inform the Board of Directors of any potential conflicts of interest, whether real or perceived, and abide by the decision of the Board related to the situation.

9. Respect the authority of the chief executive officer and staff; and, adhere to the limitations of the Board, its committees and individual Board members.

10. Agree to step down from Board position if unable to fulfill these expectations.

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[8] Some organizations make this type of statement: "Consider this organization one of your top 2 – 3 charitable commitments." What do you think of that? Why would an organization include that statement?

[9] Each candidate is invited to join the Board in order to provide specific expertise to the governance process. The individual is informed of this need – and agrees – prior to nomination or appointment.

Strengthening Fund Development for Our Agency

Your opinion is very important!

Please return this survey to _____ by _____. Thank you.

1. How familiar are you with fundraising principles?

1	2	3	4	5
No experience whatsoever	Somewhat experienced	Modest level of experience	Quite experienced	Very experienced

Comment:

2. What kind of fundraising have you done with our agency or other agencies? Please check all that apply.

   a. Helped plan and carry out a special event. ☐

   b. Signed letters asking for gifts. ☐

   c. Attended agency events and cultivate guests. ☐

   d. Personally solicited gifts from individuals and/or businesses. ☐

   e. Met with representatives of foundation, civic group or faith group to ☐
      talk about the agency.

   f. Participated in a phonathon, making calls to solicit gifts. ☐

   g. Identified individuals or businesses that might be interested in giving. ☐

   h. Other _____ ☐

   i. I have never helped fundraise. ☐

3. How willing are you to learn about fund development?

1	2	3	4	5
Not at all willing	Somewhat curious	Okay, I'll try.	Hey, this might not be too bad.	Very Willing

Comment:

4.   How informed are you personally about what is happening in fundraising at our agency?

1	2	3	4	5
Very uninformed	Minimally informed	Moderately well informed	Well informed	Very well informed and knowledgeable

Comment:

5.   How informed do you think the Board as a whole is regarding fundraising at our agency?

1	2	3	4	5
Very uninformed	Minimally informed	Moderately well informed	Well informed	Very well informed and knowledgeable

Comment:

6. Have you ever served on any type of fundraising committee? Please check all that apply.

☐   Yes, at this agency.   ☐ Yes, at another nonprofit agency   ☐ No

Comment:

7. Do you give a financial contribution to this agency?

☐ Yes, every year   ☐ Yes but infrequently   ☐ No

Comment:

8. What are your major concerns or questions about fund development?

Thank you for helping us strengthen our fund development.