

How to Build a Fundraising Board



Conducted for
**AOPHA Fund Development
Conference**
Presented by
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Today's objectives:

- ❑ Finding individuals who bring:
 - Work (Time)
 - Wisdom (Talent)
 - Wealth (Treasure)
- ❑ Keeping them:
 - Engaged
 - Passionate
 - Committed

Today's agenda

- ❑ Understanding the Board's Legal Duties
- ❑ Understanding the Role of the Board
- ❑ Committee on Governance
- ❑ Taking Inventory of Your Board
- ❑ Work Groups
- ❑ Group Report
- ❑ They're on Board, What Next?
- ❑ Final Comments

What are the board's legal duties?

- ❑ **Duty of Care :**
 - Understand the mission, attend board meetings, prepare to make informed decisions.

- ❑ **Duty of Loyalty:**
 - Avoid conflicts of interest, put the interests of the organization first.

- ❑ **Duty to Manage Accounts:**
 - Maintain accurate financial records and appropriate controls, assist in acquiring resources.

- ❑ **Duty of Compliance:**
 - Abide by the organization's bylaws, federal and state laws.

What is the role of the board?

“The most important work of any board is to create and re-create the reason for the organization’s existence...[and to ensure adequate resources to realize that vision].”

-John Carver

Boards That Make a Difference

The committee on governance:

- ❑ Comprised of 3 to 5 individuals who can devote 10-12 months (on-going) to the process
- ❑ Knows lots of people in your community
- ❑ Knows the skills that are needed to best serve the organization
- ❑ Can influence the board

The usual scenario:



The better scenario:

- ❑ Plan ahead
- ❑ Take stock of your present board
- ❑ Have a formalized application process
- ❑ Establish an interview process
 - Committee reviews application
 - Invites candidates to meet with committee/executive director
 - Provide candidate an opportunity to meet one-on-one with a board member
 - Invites candidate to a board meeting
- ❑ Board votes candidate to board membership
- ❑ Orientation
- ❑ Stewardship



Motivations to serve:

- ❑ Commitment to cause
- ❑ Political aspirations
- ❑ Civic responsibility
- ❑ Utilization of talent
- ❑ Personal & social contacts
- ❑ Status
- ❑ Career advancement
- ❑ Other _____



Taking inventory of the board:

- ❑ What skills (abilities) does your board have?
- ❑ What sectors does your board represent?
- ❑ What is the demographic makeup?

Principle fundraising responsibilities

- ❑ As a board
 - Ensures accountability
 - Ensures there are adequate resources
 - Develops a realistic strategy for raising funds
- ❑ As an individual member
 - Affirms that organization is one of his/her top 3 charitable priorities
 - Makes a personal financial gift to the organization
 - Assists with implementing the strategy to raise resources for the organization
 - ❑ Identifying and soliciting contributions
 - ❑ Attending events

Discussion



Breakouts

Sample of board demographic form

(Refer to handout)

- ❑ General demographic information
- ❑ Connections to the community
- ❑ Qualities
- ❑ Work style
- ❑ Expertise

Where are they hiding?

- ❑ Workplaces
- ❑ Social clubs
- ❑ Service organizations
- ❑ Networking groups
- ❑ Current volunteers of the organization
- ❑ Other places?



Tactics to recruit

- ❑ Post a “wanted ad” on free websites such as
 - www.boardnetusa.org
 - www.volunteermatch.org
 - www.bridgestar.org
 - your organization’s website
- ❑ Post “wanted ad” on the lobby bulletin board
- ❑ Place ads in newsletters, newspapers
- ❑ Hold a one-hour recruiting task force (Board Café 10.31.2006)
- ❑ Ask board members, staff members, colleagues
- ❑ Know other organizations’ board term limits

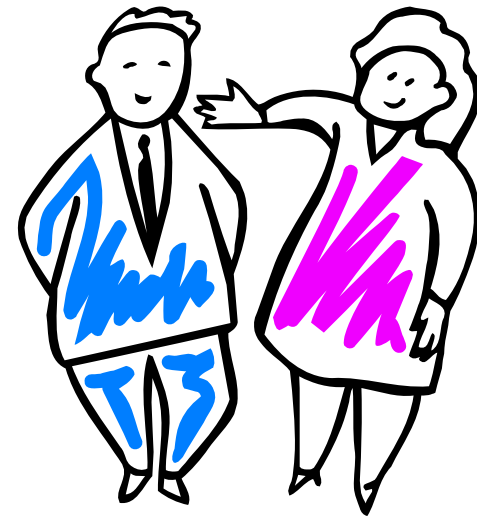
Other considerations:

- ❑ How has the candidate demonstrated an interest in the mission of the organization?
 - Passion for the cause
 - Understands the community and its needs
 - Considers your organization among his/her top 3 charitable priorities
- ❑ What's his or her potential for board leadership?
- ❑ Is the person available for meetings – board, committee and planning?
- ❑ Can this person link the organization to constituent groups?
- ❑ Is the person someone you will enjoy working with?



Welcome aboard!

- ❑ Orientation
- ❑ On-going development
 - Review work of the board
 - Survey board participation
 - Set personal goals
- ❑ Stewardship
- ❑ Recognition



In closing

- ❑ Recruitment is about establishing a relationship.
- ❑ Be up front
 - About the time commitment
 - About the financial obligations & expectations
- ❑ The strongest, connected & productive boards are those that have individuals of diverse backgrounds whose passion and abilities fit your organization.



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