



Neorelationships: Transforming Boards

How to Transform the Thinking, Engagement and
Participation in Relationship Development With
Our Boards

IFF – Prague

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Agenda



- ✦ What is YOUR board like? Discussion
- ✦ Ultimate Board Members, Ultimate Boards
 - ✦ What they look like, how they work
- ✦ Boards and Fundraising: Key Concepts
- ✦ A possible structure: The “AAA” Board
- ✦ Concluding Observations



What is YOUR Board Like?


Discussion
“Las Vegas Rules”

A Noble Service



- ✦ The governance of an organization that serves community needs is in the hands of your board
- ✦ The board's wisdom, decisions, willingness to give time and money and their service has value and impact on the organization for years after their service is finished
- ✦ A unique role in a unique sector
- ✦ Board members are part of a force of capable individuals in CEE who are engaged in strengthening Civil Society

What is Required of Board Members



- ✦ Be wise
- ✦ Be visionary
- ✦ Be assured that being a board member is one of the most enriching experiences they'll ever have
- ✦ Frustrating at times and exhilarating at others
- ✦ The role makes demands, but gives huge rewards
- ✦ It will connect board members with people who will add new dimensions to their lives
- ✦ Board members help provide resources for the present, and hope for the future

Good Board Members



- ✦ Attend board and committee meetings
- ✦ Read and understand materials and publications
- ✦ Treat all information with confidence
- ✦ Understand financial information and processes
- ✦ Review and follow policies previously set and create new ones if needed
- ✦ Respect staff and their time, and know the boundaries

Staying Satisfied



- ✦ Three key factors determine satisfaction with board service:
 - ✦ How much the board member believes in the issues the organization is addressing
 - ✦ How well their values match those espoused by the organization
 - ✦ How motivating board members find the tasks to which they are assigned (AAA)



Mission, Vision, Values

Core of commitment to the organization and to the community

Mission and the Ultimate Board Member




- ✦ Board members are “keepers of the mission”
- ✦ Mission is *why* your organization exists – the human or societal need you are meeting
- ✦ Board members have to master the mission and insist on a strong mission statement
- ✦ To “keep” the mission, board members have to be able to articulate it and stay connected to it
- ✦ Windows –vs- mirrors: the way to keep the mission fresh

Vision and the Ultimate Board Member



- ✦ Leaders share the vision with others
- ✦ Vision is larger than the organization: it is for the community if the vision is achieved
- ✦ Board members must be able to convey the vision: it is key to engaging other board members and donors in the organization
- ✦ Your organization's vision will inspire others, including staff
- ✦ Vision is what inspires donor-investors to stay connected with your organization

Values and the Ultimate Board Member



- ✦ Be a champion and guardian of the organization's values
- ✦ Nonprofits are driven by values, so is philanthropy: important to keep them aligned
- ✦ A board member's own commitment to values is first
- ✦ Ensure that marketing and development materials reflect the values
- ✦ Know how to articulate the values

Philanthropy

Based in values

Development

Uncovers shared values

Fund Raising

*Gives people opportunities
to act on their values*



Board Members and Fund Raising

A key role



***"I welcome you to the 283rd meeting of the
Society for Innovation in Fund Raising."***

The Only Long Term Innovation: 4 Key Points That Support All Giving



- ✦ The most powerful innovation is in attitude about community resource development (people and money)
 - ✦ People give to you because you meet needs, not because you have needs (they invest in results)
 - ✦ A gift to you is really a gift through you into the community (you are not the end user)
 - ✦ Fundraising is not about money, it is about relationships
 - ✦ Asking is inviting community investment in organizations that are solving community problems or enhancing community resources in CEE

Positioning Your Organization as a Community Investment


- ✦ 21st century philanthropy – including gifts from and brought in by board members – is increasingly done from a sense of wanting to invest
- ✦ Obligation is not a lasting motivation for giving
- ✦ People invest in impact, issues, ideas
- ✦ Board members are the connectors that move community investors into a relationship with your organization

Whose Responsibility is it to Raise Money?



- ✦ Every board member needs to be involved in the *development process*, but not every board member will be involved in *fund raising*
- ✦ All board members can help identify, qualify, develop strategies, cultivate and steward -- it is part of your job
- ✦ The full development team is the board and staff; the core development team designs and implements the fund raising program

Board Role(s) in Raising Funds




- ✦ Begins with giving (100% participation by the board) that leverages community giving (ask board members personally – never by phone or letter)
- ✦ Board members will play one or more of these roles to create a “AAA Board:”
 - ✦ Ambassador
 - ✦ Advocate
 - ✦ Asker



Becoming a AAA Board


What it entails
What it can do for your board

Defining a AAA Board



- ✦ A board with a AAA Rating is one where every board member is motivated to be an Ambassador, Advocate and/or Asker – they choose assignments that are specific and geared to their motivation
- ✦ AAA is a management tool for organizations
- ✦ AAA boards provide leadership in developing community relationships and resources

Transforming Your Board



- ✦ Organization-wide commitment to mission, vision and values and building relationships
- ✦ An understanding that each interaction with anyone from the community is part of the development process
- ✦ Everyone thinks about “development” (of relationships)
- ✦ Staff and all board and non-board volunteers understand the importance and purpose of your work
- ✦ Visitors, employees, donors and volunteers feel the commitment to development when they are with you

Roles Board Members Play in a Transformed Organization



✦ Ambassadors

- ✦ Make friends
- ✦ Build relationships

✦ Advocates

- ✦ Make the case (formal and informal)
- ✦ Key to building community relationships

✦ Askers

- ✦ Make the ask

Ambassadors

- ✦ A role everyone needs to play
- ✦ Key roles in cultivation of prospective donors and relationships with continuing donor-investors: know how to follow up with people they meet and introduce them to the organization
- ✦ Need to be familiar with and confident about expressing the organization's basic message
- ✦ Catalysts for donor-investor renewal
- ✦ Who on your board plays this role especially well?

Advocates

- ✦ Accept assignments where they represent the organization either alone or with a staff person
- ✦ They may also advocate for your organization on a more formal basis with government, another organization with which you are partnering or an institutional funder
- ✦ Are confident in their expression of the message and are aware of your strategic direction and vision
- ✦ Are coached before meetings on desired results of the advocacy and handling objections
- ✦ Are there Advocates on your board?

Askers

- ✦ Enjoy asking
- ✦ Well informed, well trained
- ✦ Work with staff to ensure maximum possibility of success
- ✦ Teamed with another board asker or staff leader
- ✦ Benefit from the work of the Ambassadors and Advocates
- ✦ Think about who on your board plays/could play this role

Becoming a AAA Board

- ✦ Some board members will do all three roles
- ✦ Most board members choose one or two
- ✦ Motivation is increased when board members choose roles that draw on their skills and confidence
- ✦ AAA can engage each board member in roles that contribute to your organization's advancement and helps them feel respected and engaged
- ✦ As motivation increases, you will find board members moving among the roles – even to Asker!



Review of AAA Checklist

Could this work for your board....?



Concluding Observations

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On transforming your board

Performance Factors of Engaged Board Members



- ✦ Part content, part style and part dynamics
- ✦ Content
 - ✦ Make good decisions, raise money, champion the organization and do the board's work
- ✦ Style
 - ✦ Uniquely their own
- ✦ Dynamics
 - ✦ Working with others to make the board "work" is what makes the quality difference

A Transformed Board



- ✦ Powerful impact
- ✦ Organizational capacity increases
- ✦ Help create a “dream board” – strong, dynamic and well-functioning
- ✦ The transformed board member
 - ✦ Draws on his/her gifts and talents willingly
 - ✦ Offers his/her network of contacts appropriately
 - ✦ Understands his/her ability to transform your organization, your community and CEE

To Transform Your Board



- ✦ Seize the opportunity
- ✦ Ask probing questions
- ✦ Know that the need for your service has never been greater
- ✦ Spread your wings
- ✦ Do your best
- ✦ Understand and respect the sector
- ✦ Champion the organization
 - ✦ The results may resound for generations

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For Additional Information



- ✦ Material has been drawn from two of Kay's books:
- ✦ “The AAA Way to Fundraising Success: Maximum Involvement, Maximum Results”
 - ✦ Whit Press, 2009. www.whitpress.org USD \$16.95
- ✦ “The Ultimate Board Member's Book”
 - ✦ Emerson & Church, 2007.
<http://emersonandchurch.com/bookstore/the-ultimate-board-members-book/> USD \$24.95