

Fostering Inspired Leadership

by David Allen
Developed for
Madison Non Profit Day
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- 30 years raising money by asking
- 13 with TNC Chapters in OR, TX, and WI
- 10 with Sand County Foundation
- Door-to-Door canvassing to Membership Systems to \$18MM Capital Campaign
- Consulting since 2004



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Five Things

- Schedule and Conduct Fewer Board Meetings
- Marry the Nominating Committee to the Development Committee
- Rethink the Orientation
- Become a Standard Bearer
- Board Evaluations



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Schedule and Conduct Fewer Board Meetings



"Everyone here? Good. Meeting topic: Setting world record for shortest meeting. All in favor: say aye. Ayes have it. Meeting over."



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Shared Leadership

- Extensive communication, frequent board meetings
- "Committee of the Whole"
- Members take turns leading

Shared Leadership

- Tend to recruit like-minded board members at the expense of diversity
- Tend to become task oriented at the expense of strategic thinking

Shared Leadership

- Tend to build membership at the expense of more difficult major gift fundraising
- Significant time commitment makes recruiting new leadership difficult



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Transition: Committee-Centered

For shared leadership organizations to survive and grow, they must:

- transition into organizations that get much of the work done in committees



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Committee-Centered

- Committees meet as workflow demands; board meets 4-6 times each year
- Board meetings are split between an informational session and a business session
- Board meetings are both shorter and less frequent



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Transition Needs

- Analyze two years of board agendas and minutes, looking for decisions made
- Draft a charter for each committee clearly stating its purpose and authority for making decisions
- Develop committee leadership



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Marry the Nominating Committee to the Development Committee



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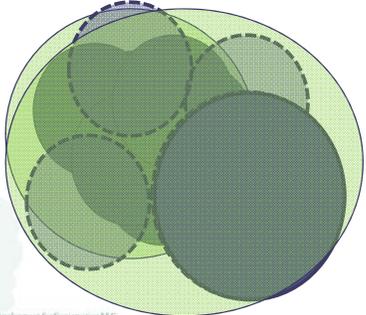
Access

- If you leave a message for someone – voicemail or email – and they respond to you, you have “access.”
- Access can be built, used, and over-used.



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Access



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Remember

- Board service is a major gift – for the donor
- Recruit from your existing supporters
- Recruit LEADERS- people others will respect, take seriously, and follow.

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Remember

- You do not have to be on the board of directors to volunteer for an organization you love.
- Board membership should not be a reward for volunteer effort – or for giving money either.

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Here's the Point.....

- The people you need most are probably not available to you right away.
- They need to be introduced to the idea, wooed, and ultimately solicited.
- Sounds like donor development.

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Rethink the Orientation



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Re-Think

- Re-Think in terms of showing new board members what you want them to know.
- Re-Think in terms of practice.
- Re-Think in terms of the story they will tell others.

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Checklist Items

- Sit in on one meeting of each board committee,
- Serve for a year on the Finance Committee,
- Visit a project site,
- Develop and practice an “elevator speech,”
- Call a donor to say thank you,
- Get to know a set of donor prospects,
- Attend an organizational event.




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3A

Serve on the Finance Committee for the first year




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No Excuses

- “I’m just not a numbers person”
- “I’m just glad that _____ understands the financials”
- “I’ll do anything as long as I don’t have to fundraise”



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Every Director Should Know

- Trending – Where have we come from?
- Forecasting – Where are we going?
- Decision Triggers
- Internal Controls

*There are three kinds of people in the world:
Those who can count and
those who can't.*

-Anonymous



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Become a Standard Bearer




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Non-Profit Standards

- Mission
 - Planning & Evaluation – Outreach – Ethics
 - Check for vertical alignment and consistency



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Non-Profit Standards

- Compliance with current law
 - 501c3,
 - Registered with the state,
 - Records policy,
 - Advocacy



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Non-Profit Standards

- Board Accountability
 - Adequate oversight,
 - Diversity,
 - Recruitment and evaluation,
 - Board roles are clear,
 - Delegated responsibility is clear,
 - Prevention of minority rule



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Non-Profit Standards

- Conflicts of Interest
 - Clear policy that everyone understands,
 - Documentation of conflicts,
 - Documentation or policy compliance,
 - No compensation for board members



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Non-Profit Standards

- Fundraising
 - Compliance with laws,
 - No commission-based fundraising,
 - Accountable to donors,
 - Accurate representations in materials,
 - Commercial marketing agreements,
 - Other use of logo



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Non-Profit Standards

- Financial and Asset Management
 - Budget,
 - Record keeping,
 - Internal Controls policy,
 - Board approval of statements and reports,
 - Review or Audit,
 - Investment policy,
 - Gift acceptance policy,
 - Risk management (Insurance)



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Non-Profit Standards

- Volunteers/Staff/Consultants
 - Capacity,
 - Program for screening and training,
 - Job Descriptions,
 - Personnel policies,
 - Clear lines of authority,
 - Evaluations and compensation,
 - Contract review



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Job of Standard Bearer

- One report on each standard at least every three years.
 - Are we compliant?
 - Are we consistent?
 - Do we know what to do?
 - Are we sustainable?



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Job of Standard Bearer

Without reservation, I believe this organization is compliant with both the letter and the spirit of the standard. The By-Laws, mission, plans, and policies are all internally consistent, and we apply them consistently as needs and opportunities present themselves.



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Board Evaluations




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Job Responsibilities of a Board Director

- Governance
- Management
- Fundraising
- Celebration




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Job Description

- Board Directors
 - Chosen for their leadership potential or because they bring a professional credibility not found otherwise on the board.
 - Serve on at least one and at most three committees.
 - Adopt at least one and at most ten major donors to cultivate and manage for major gifts
 - Attend board meetings and organizational events.



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Job Description

- Chair
 - Recruited with belief that they would make a good Chair someday
 - Must have served at least one year on each of the committees, and at least one year as Vice-Chair.
 - Must hold other board directors accountable.
 - Annually conducts one-on-one interviews with each board director to discuss current committee assignments, other board related activities, general thoughts and opinions, and his/her own giving for the current year.



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Services

Assessment, Planning, Training, Coaching

*You can raise more money for your organization
– I can help.*

fundraisinghelp@sbcglobal.net
608/239-5006



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