

Board Development

Executive Fundraising Academy
2017



**National
Urban League**

Learning Objectives

- Determine the reasons donors give
- Discuss the purpose of a nonprofit Board
- Discuss the why and how of Board development
- Review effective tools for engaging and developing your Board



Why Do People Give?

Top Reasons

1. People are inherently generous
2. People give to people
3. People respond to a meaningful mission
4. People give to the person who asks
5. People respond to specific requests for support
6. People respond to successful and beneficial programs
7. People give in a campaign atmosphere – annual or capital
8. Most people want, and all deserve, recognition for their gifts
9. People relate a gift to a specific need or project
10. People give to positive, enthusiastic solicitors
11. People give most often to their peers
12. People give because they are asked



Board Development: Why and how?



**National
Urban League**

Why Board Development?

Board Development offers an opportunity to strengthen an Affiliate's leadership by adding:

Social
prominence

Industry
expertise

Access to
new
industries

Financial
capacity

Diversity



The Board Development Process

1) Analyze current Board

2) Identify Candidates

3) Scheduling the Meeting

4) The Meeting

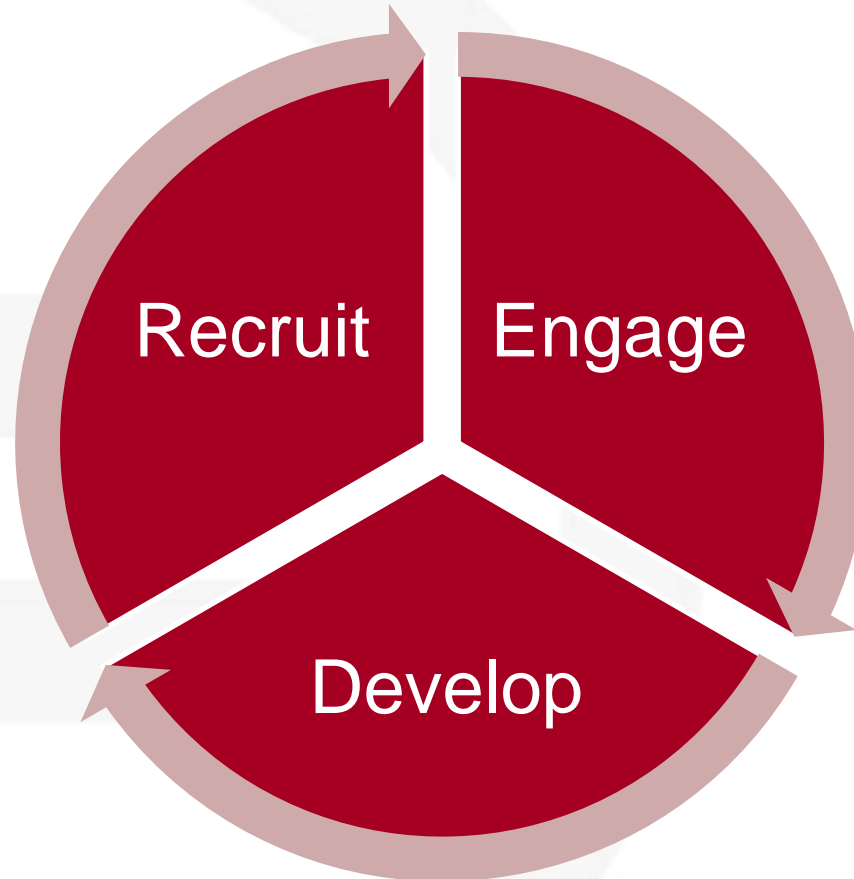
5) Introduce, Orient, Engage

6) Develop Fundraisers



Creating an Effective Board

A continual process



1) Analyze the current Board

- Board Matrix
 - Years on Board
 - Gender
 - Ethnicity
 - Age
 - Sector
 - Level in Business
 - Influence
 - Fundraising Capability

SAMPLE (not actual matrix)	John Smith				Totals
	Name	Name	Name	Name	
Tenure on Board	< 1 year				0
	1-2 years				0
	2-3 years				0
	3-5 years	1			1
	5-10 years				0
	10+ years				0
Gender	Female				0
	Male	1			1
Ethnicity	African-American	1			1
	Latino				0
	Asian				0
	Caucasian				0
Age	20-30				0
	30-40				0
	40-50				0
	50-60				0
	60+	1			1
Sector	Government	1			1
	Foundation				0
	Legal	0			0
	Finance				0
	Real Estate				0
Level	CEO or President				0
	Vice President	1			1
	Business Owner				0
Influence	Social				0
	Philanthropic	1			1
	Media				0
	Government				0



2) Identify Candidates

- Focus on areas where the matrix shows zeros.
- Create a list of desired prospect criteria.
- The goal is to achieve a balanced mix.
- Create two types of candidates:
 - Current donors, partners, sponsors, or members
 - New potential Board prospects
- Consider increasing the number of Board members to the maximum allowed in your by-laws.



Where to Find Board Candidates

Internal

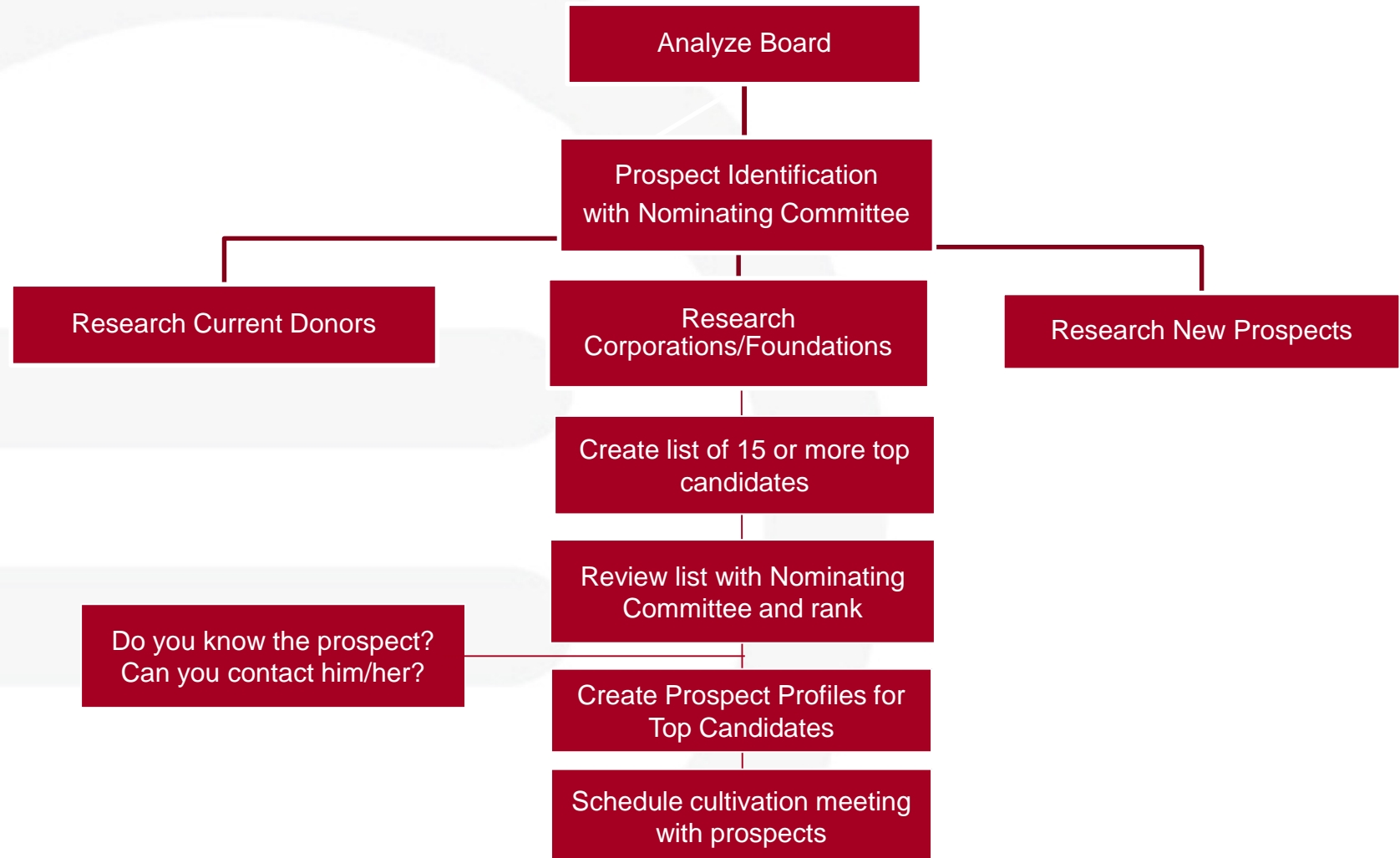
- List of 50 top current donors
- Current Foundations and Corporate Partners
 - Board Members
 - Executives
- Prospect names identified by current Board members

External

- Boards of organizations of similar size in your area
- Boards of organizations with similar missions
- List of top minority leaders in your area
 - Black Enterprise Magazine
 - Fortune, Most Powerful Black Executives
 - Diversity Inc. Magazine



3) From Identification to Scheduling the Meeting



4) The Recruitment Meeting

Who Attends

- CEO/President
- A current Board member (connected to the prospect)

How to Prepare

- Materials:
 - A research profile on the prospect
 - Key talking points
- Meetings:
 - Briefing and de-briefing sessions before and after the recruitment meeting
 - 1-2 cultivation meetings with the prospect (or more as needed)

The Ask

- Present Board roles and responsibilities
- Financial Audit
- Recruitment Prospectus



5) Introduce, Orient, Engage



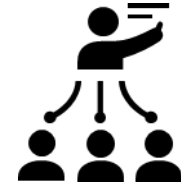
Introduce

- Introduce new Board member at next event



Orient

- Provide a Board Orientation 1-2 times annually
- Issue a copy of annual report, case statement, by-laws, and events/meetings calendar



Engage

- Immediately appoint new Board member to a committee
- Staff the new Board member and establish a working relationship



6) Develop Board for Fundraising

IMPACT



INCOME



1. Champion...
...The CAUSE and the CASE
2. Invite...
...Others to get INVOLVED and ENGAGED
3. Invest...
...With COMMESURATE COMMITMENT



How to create effective Boards

- Remember, your Board members are volunteers.
- Never ask for help with more than three tasks at a time.
- Provide lists and instruction.
- Set metrics, goals, and report on progress.
- Celebrate successes.
- Show appreciation.



Board Fundraising Checklist

1	Vet lists provided by the Development/President's Office of leading representatives of corporations, charitable foundations, and individuals to identify possible connections	<input type="checkbox"/>
2	Review lists of colleagues and associates as potential funders	<input type="checkbox"/>
3	Host and/or attend events designed to cultivate potential donors to support the Urban League	<input type="checkbox"/>
4	Attend a cultivation briefing meeting with an interested donor	<input type="checkbox"/>
5	Craft endorsement letters to contacts to help provide access to potential donors	<input type="checkbox"/>
6	Participate, if appropriate, on select solicitations	<input type="checkbox"/>
7	Co-sign letters of solicitation for gift requests or invitations to a cultivation event	<input type="checkbox"/>
8	Provide a compelling written testimonial on the aspirations and financial priorities of the Urban League for publications or website content	<input type="checkbox"/>
9	Help with message delivery to encourage donors to support the Urban League's goals and provide insight as the case elements presented in fund-raising letters and materials	<input type="checkbox"/>
10	Make a representative commitment to the Urban League	<input type="checkbox"/>



Customizable Tools

Board Evaluation Matrix
Board Recruitment Prospectus



Discussion

1. What is the process for Board Member recruitment at your Affiliate?
2. What would you change about the process based on today's discussion?
3. Does your Affiliate have a maximum number of Board members in your by-laws?
4. If you are not at the maximum membership total, what is preventing your Affiliate from recruiting the maximum number?



Questions & Discussion

Thank you for your participation!



**National
Urban League**

