



# Engaging Leadership: Leveraging Your Board To Advance Your Organization

11/29/17

# 10 Most Important Characteristics of a Culture of Philanthropy\*

1. Leadership of the organization;
2. Fundraising goals that are aligned with the organization's mission;
3. A commitment to stewarding gifts;
4. Engaged volunteers and donors;
5. Clear and concise mission and vision statements;
6. Donors with capacity and interest in major gifts;
7. Quality of programs and services;
8. Opportunities for stakeholders to engage with the organization;
9. Quality and reputation of the staff; and
10. Demonstrated need for philanthropic support.

\* CASE "Currents" Worldwide Survey of Chief Advancement Officers

# The Challenges of Creating a Giving Policy:

(cited from Grant Callery, Board of Trustees, Marietta College- AGB July/August 2014)

- Give a certain amount?
- Minimum level of support
- Top 2-3 organizations in member's donor hierarchy
- Give/get policy
- Exemptions for specific expertise
- Exceptions to achieve diversity

# Process for Building a Board Pipeline

## Level 4: Identifying

Candidates emerge through one or more of the following:

- Wealth screen
- Internal staff research
- Presidential request
- Trustee referral
- News media coverage
- Professional awards/honors
- Staff qualification visit
- Leadership of other non-profits
- Other

# Process for Building a Board Pipeline

## Level 3: Connecting

Candidates connect by:

- Providing updated personal and professional information
- Agreeing to meet staff
- Attending on-site events
- Attending off-site events
- Making a gift
- Joining online community
- Other

# Process for Building a Board Pipeline

## Level 2: Engaging

Candidates engage by:

- Attending on-site events
- Attending off-site events
- Hosting events
- Meeting with staff
- Meeting with President/CEO
- Serving as a guest lecturer
- Meeting with constituents
- Giving at leadership level
- Serving as a volunteer
- Providing professional advice and counsel
- Offering goods & services
- Other

# Process for Building a Board Pipeline

## Level 1: Committing

Candidates are committed when:

- Accepting invitation to serve on BOT
- Attending all meetings as required
- Chairing a standing committee
- Annual leadership donor
- Capital donor
- Hosts events for President/CEO
- Promotes organization among prospective donors
- Travels on behalf of organization
- Solicits others for gifts for annual and capital priorities
- Opens doors to new prospective donors
- Makes planned/deferred gifts
- Other

# Determine Motivations For Serving

- Define 3 most influential institutions/organizations
- Determine competing interests – other Board service
- Determine philanthropic “hierarchy” – “where does our organization fit?”



# Defining Roles

- Cultivators
- Door Openers
- Askers

# Defining Roles (con't)

## Cultivators:

- Promote the organization – “multiply the message”
- Host cultivation, stewardship, and educational/informational events
- Public Advocacy – verbal and written communications

# Defining Roles (con't)

## Door Openers:

- Identify potential future board members
- Facilitate introductions to potential funders, influencers, and advocates
- Avoid “name droppers”

# Defining Roles (con't)

## Askers:

- Directly solicit financial and gift-in-kind support
- Facilitate a 3<sup>rd</sup> party solicitation
- Participate in the planning and development of a grant application to an entity source (corporation, foundation, or government)

# Suggested Readings on Boards and Organizations:

**Governance as Leadership: Reframing the Work of Nonprofit Boards**

Richard P. Chait, William P. Ryan and Barbara E. Taylor

**The Five Life Stages of Nonprofit Organizations: Where You Are, Where You're Going, and What to Expect When You Get There [Paperback]**

Judith Sharken Simon

**Navigating the Organizational Lifecycle: A Capacity-Building Guide for Nonprofit Leaders [Print]: A Capacity-Building Guide for Nonprofit Leaders**

Paul M. Connolly

**Nonprofit Lifecycles: Stage-Based Wisdom for Nonprofit Capacity [Paperback]**

Susan Kenny Stevens

**Board Passages: Three Key Stages in a Nonprofit Board's Life Cycle**

Karl Mathiasen, III