

Board/Chapter Development & Future Leadership

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Today's Agenda

- Welcome
- General roles & responsibilities
- Recruiting board/chapter members
- Recruitment strategies
- Orientation of new candidates
- Motivating & energizing members
- Fundraising tips & strategies to overcome obstacles
- Group exercise: Making the ask
- Conclusion / Q&A



General Roles and Responsibilities

General Roles/Responsibilities of Nonprofit Board of Directors & Chapters

- Financial
- Planning/establishing goals, looking ahead rather than driving thru the real-view mirror
- Leadership and Continuity
- Personnel
- Policy
- Public Relations and Marketing
- Chapter Assessment and Evaluation



**Recruiting Board/Chapter
Members
Assessing what you have**

Assessing Your Board/Chapter's Composition

1. Examine YOUR current Board/chapter with the help of a board grid
2. Conduct a SWOT analysis of YOUR Board
3. Match the strengths and weaknesses of YOUR board/chapter with the life cycle of YOUR organization



**Recruiting Board/Chapter
Members
Using the Board Grid**

Board Grid

Board Member Names →			M/F	M/F	M/F	M/F	M/F	M/F	M/F	M/F	M/F	M/F	M/F	M/F	M/F
Demographics															
Under 21 years															
21-30 years															
31-40 years															
41-50 years															
51-60 years															
61-70 years															
70 + years															
Ethnicity															
African-American															
Caucasian															
Latino															
Asian															
Native American															

Board/chapter SWOT

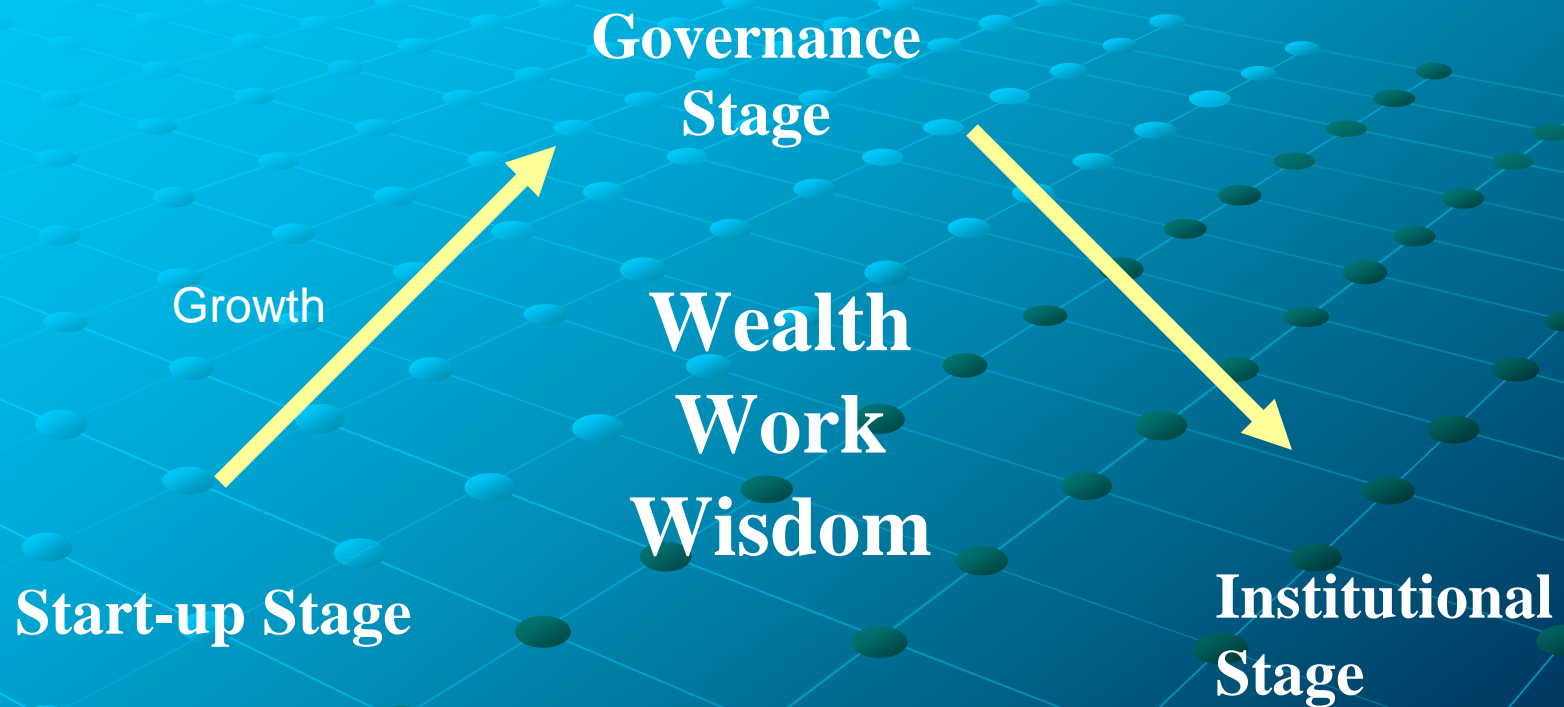
- Helps the board/chapter realize its strengths and shortcomings
- May help create a list of potential recruits for the board
- Helpful in determining where the agency is in its Lifecycle development



Recruiting Board Members

Assessing where You ARE in Development

Life Cycles of Nonprofit Organization



Life Cycle of a Nonprofit

- Board/chapter roles change with the Life Cycle
- Board composition should change with the Life Cycle
- How well you fundraise may be determined by where your organization is in its lifecycle
- Examine the culture of your organization
 - Have recent circumstances contributed to the organization's desire to attract other board members
 - Does the board resist getting involved due to its culture
 - Was your board designed as a fundraising board?



The Strategy for Recruitment

The Recruiting Strategy – Overview

- Don't lose control of the process. Serving on your board/chapter should be a privilege not a right
- You are not looking for “warm bodies”
- Tell recruits that your interviewing several candidates for open board slots
- Develop a written application
- Recruit 2 to 3 NEW candidates at the same time

Recruiting Strategy – Developing a List of Recruits

1. Use the Board Grid and SWOT to guide you
2. Develop names of people who match with the needs of your organization
3. Discard names that duplicate skills and qualities of existing board members
4. Don't be afraid to add people to the list that you don't know – Don't go into the process looking for just another warm body

Recruitment Strategy – The Details

Lucky 7 Step Process

Step 1:

Identify the top candidates

Step 2:

Have two people go out to coffee with the top candidates

Describe to potential candidates what skills you think he/she brings to the board and why he/she was considered

Step 3:

For those candidates where the first meeting went well, invite the candidates in a group meeting to your office

Recruitment Strategy (cont.)

Step 4:

Have candidates fill out an application and/or submit a resume so candidate takes the initiative

Step 5:

Have the Board member(and one other leader) set up a meeting to negotiate the candidate's role, participation, time and financial commitment as a board member

Step 6:

Election to the board

Step 7:

Determine and plan out orientation prior to FIRST board meeting

Recruiting Board/chapter Members

Final Notes

- Develop Clear Expectations
- Define what's expected of Board service
 - Hours they have available
 - Skill and Expertise
 - Wealth and connections
- Take your time to recruit and make Board service be prestigious



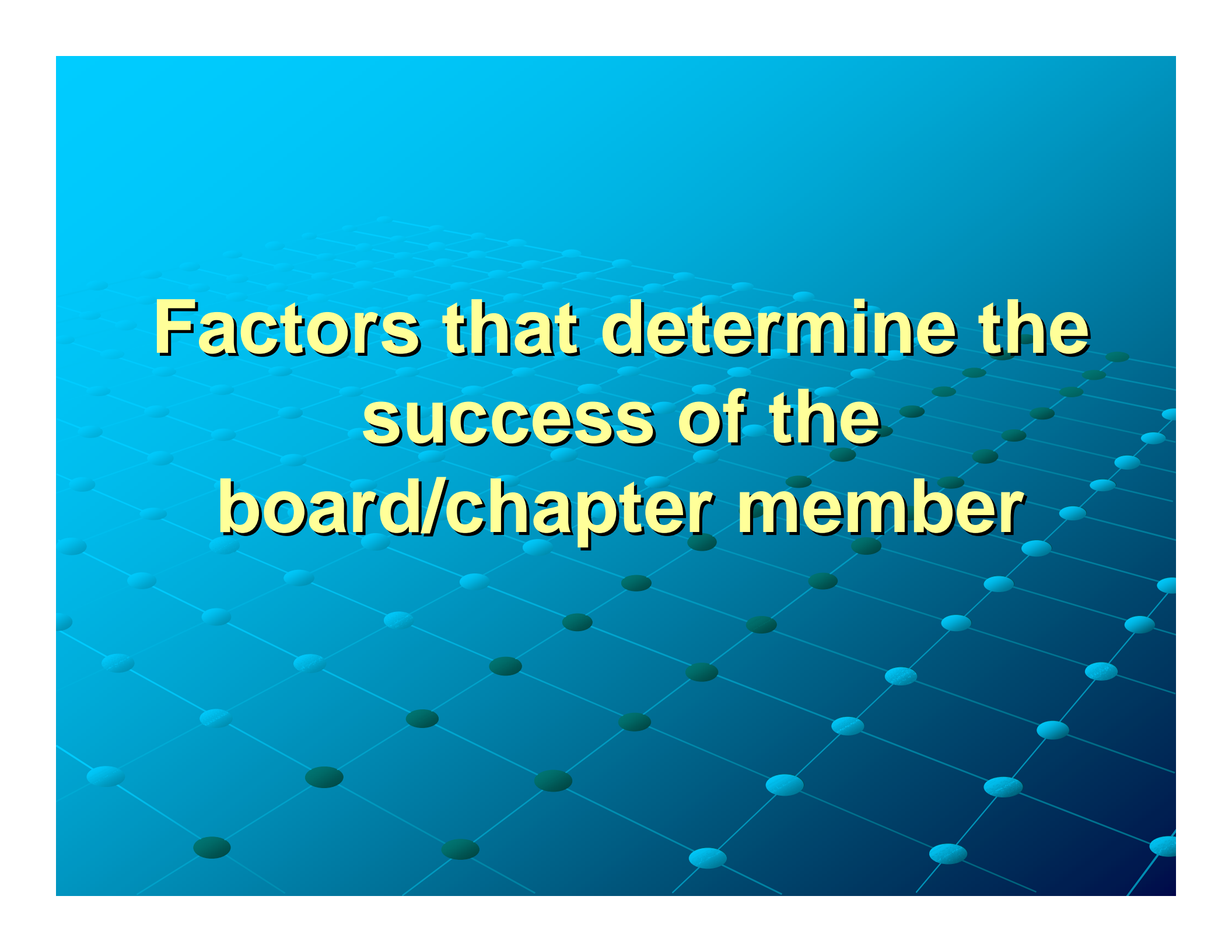
Orienting New Candidates

Orienting Board/Chapter Members

- THE KEY to SUCCESS
- Interview and meet with board members regularly
- Show Board members your facility, historical documents and financials
- Introduce them to staff members, key volunteers and clients
- Get them to understand your vision, mission through stories from constituents
- Hit the ground running – Engage them early

Orientation – Establish a Buddy System

- Assign an existing member to check in regularly with a new member (first 3 meetings)
- Have existing member email, telephone the new member and answer questions
- Have the existing member take a new board member to coffee
- Groom the new board members to become new leaders of the organization



**Factors that determine the
success of the
board/chapter member**

4 KEY Criteria for Success

Determines success and engagement of the board

1. Relationships are established between the new board member and the rest of the board
2. The organization is making a difference in the community – demonstrate this with at least 10 minutes at every board meeting
3. Is new member's time well spent – Are they using time well at board meetings, etc.
4. Is the new member learning and growing due to participation in the board
 - There should be 10 to 15 minutes devoted to learning new things

Role of the Board Chair



Roles of the Board Chair

- To help motivate others to become involved
- To ask members to donate to the organization on a yearly basis
- To address the board contract and make people accountable for fulfilling the contract
- To be a role model in Resource Development Efforts
- To Coordinate the efforts of the Development Committee with the whole Board
- To lead the Board
- To allow other opinions to be expressed and invite all members to participate

Motivating Board Members



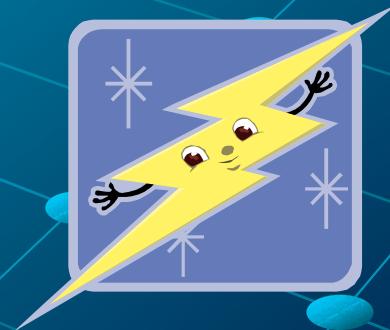
Motivating Board/Chapter Members

- Personalize the relationship with your board /chapter members
- Involve board members in as many programs and activities as possible. Invite them to attend meetings with you, etc.
- Set high expectations early – people rise to the level we set

Motivating Board/Chapter Members

- Feed your board members by conducting Intellectual Board sessions – Discuss fundraising, marketing at these sessions
- Form a Care and Feeding Committee of the Board
- Have the board chair spend time with new Board members
- Have the Board chair take them out for coffee/lunch

Tips on Energizing Your Board/Chapter Members



Energizing Board/Chair Members

- Conduct Yearly retreats
 - Get to know one another
 - Help plan the year's activities
- Survey Board/chapter Members Yearly
 - Use Survey monkey as a tool to expedite feedback

Energizing Board/Chair Members

- Remember the Personal Touch
 - Cards for birthdays, anniversaries, etc.
- Make Board meetings ENTERTAINING, Productive and Educational
 - Start and End on time
 - Have a 15 minute educational session conducted by different board members
 - Have a clear agenda
 - Keep the meetings to 90 minutes
 - Involve the board members in the discussion
 - Have Action Items Clearly Marked on the Agenda

Simple Fundraising Ideas for the Board



Roles of Board/Chair Members in Fundraising

- Board/chapter is responsible for the financial well-being of the organization.
- Easier to approach foundations, corporations and individuals if the board is committed
- To see that the Board/chapter passes the Resource Development and Yearly Operational strategies
- Assure that fundraising is organizational rather than an individual commitment

Roles of Board/Chair Members in Fundraising

1. Identify potential prospects
2. Door openers
3. Strategists
4. Attend luncheons, coffee & funding interviews
5. Writing 'Thank You' notes
6. Hosting special events
7. Asking for \$\$\$
8. Recruiting committee & board members
9. Create a Board Contract
 - Define what is expected of board members
 - Define what fundraising expectations are required
 - Sets Goals for the Board

Overcoming Obstacles to Fundraising



Obstacles to Fundraising

1. Fear of asking for money
 - Taboo of money, religion & politics
2. “I’m already donating my time”
 - Too busy
3. “I don’t have any rich friends”
 - Circle of friends and influence on others

Overcoming Concerns

1. Fear of asking for money

- Training can help / practice
- What's the worst that can happen?
 - Die from fear
 - Person will say no
 - Ruin a friendship

Overcoming Concerns

2. “I’m already donating my time”

- Programs depend on people & financial resources
- Can’t donate time to pay for most things in life
- Include & encourage others to get involved

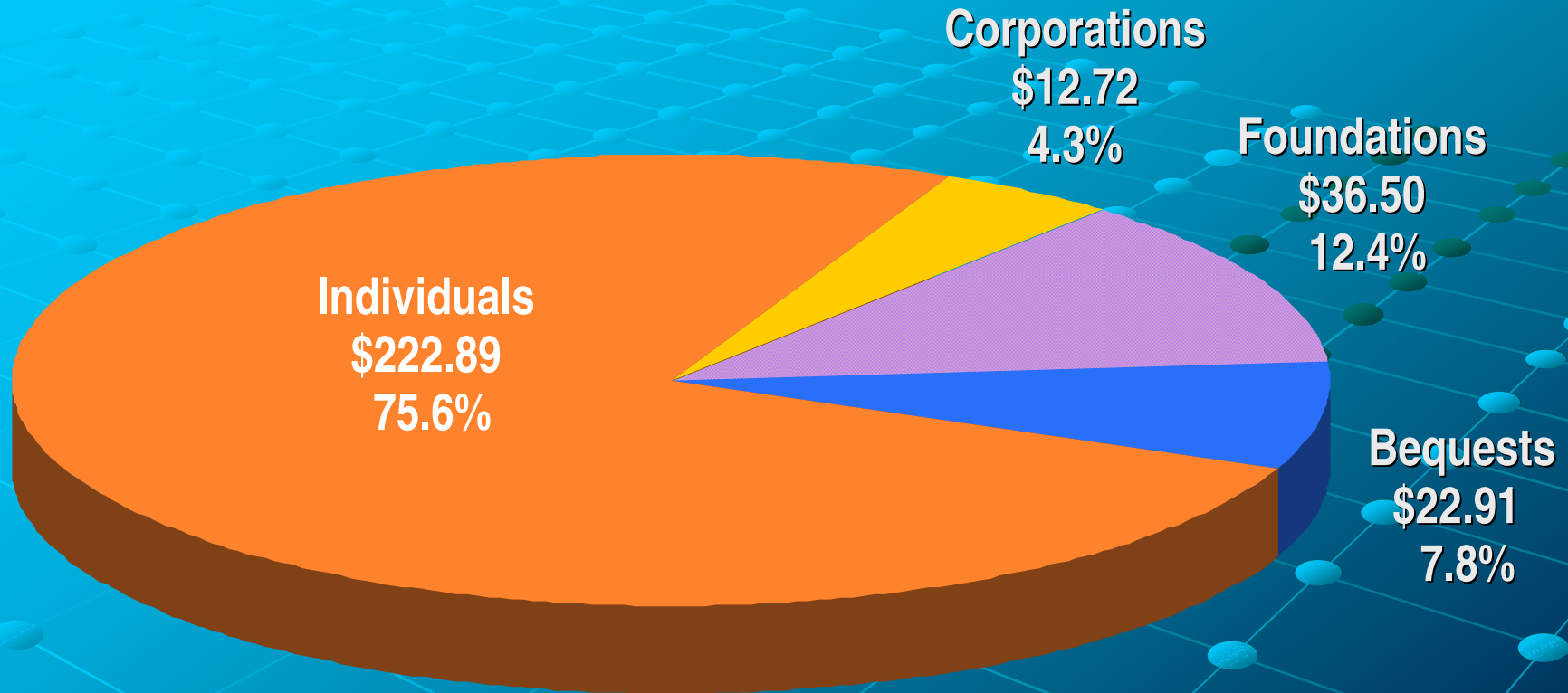
Overcoming Concerns

3. “I don’t have any rich friends”

- Circle of friends & influence on others
- People give out of willingness & not necessarily ability to give

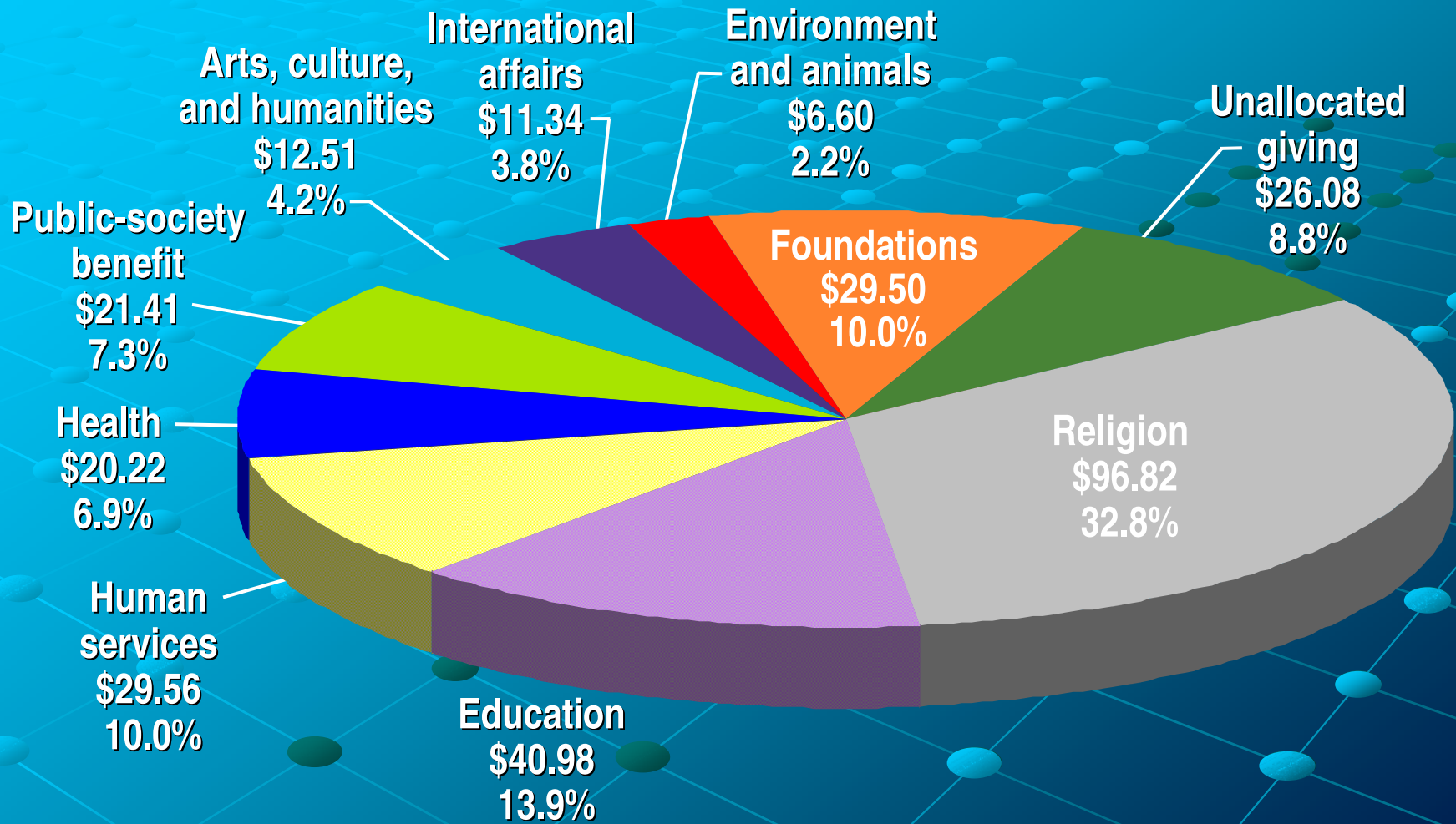
2006 charitable giving

Total = \$295.02 billion



Source Giving USA

Types of recipients of contributions, Total = \$295.02 billion



Why People Donate OR Don't

- Sense of helping; aiding those in need
- Changing the world
- Creating a legacy for themselves or their family
- Tax break
- Because they are taught to or have an obligation to a higher purpose or calling
- Read – “Who Really Cares – America’s Charity Divide”

From *Who Really Cares*

“Approximately three-quarters of Americans give their time and money to various charities, churches, and causes; the other quarter of the population does not.”

Why...

Source: *Who Really Cares*
By Arthur C. Brooks

Who Really Cares

Four Major Factors in determining whether a person is likely to donate

1. Strong families and personal experience with the cause
2. Church attendance
3. Earned income (as opposed to state-subsidized income)
4. The belief that individuals, not government, offer the best solution to social ills-all

More From Who Really Cares

People who are religious give more across the board to all causes than their non-religious counterparts

- On average, religious people are far more generous than secularists with their time and money. Religious people are more generous than secularists towards explicitly non-religious charities as well.

Giving supports economic growth and actually creates prosperity

- Many studies show that giving and volunteering improve physical health and happiness, and lead to better citizenship.

More From Who Really Cares

The working poor in America give more to charity than the middle class

- The American working poor are, relative to their income, some of the most generous people in America today. The nonworking poor, however—those on public assistance instead of earning low wages—give at lower levels than any other group. In other words, poverty does not discourage charity in America, but welfare does.

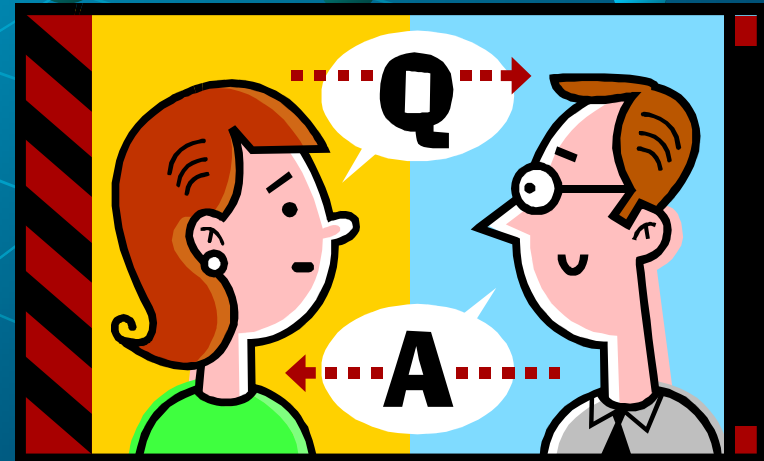
Upper level income people often give less than the working poor

- Among Americans with above-average incomes who do not give charitably, a majority say that they ‘don’t have enough money.’ Meanwhile, the working poor in America give a larger percentage of their incomes to charity than any other income group, including the middle class and rich.

Plus:

- People who give money charitably are 43 percent more likely to say they are “very happy” than nongivers and 25 percent more likely than nongivers to say their health is excellent or very good.

Group Exercise: Making the Ask



1. Making the Ask -- Prepare

- Find out information about the prospect
- Calculate the amount you believe the prospect can donate to your organization
- Cultivate the relationship before the 'ask' UNLESS an existing relationship exists
- Bring a colleague (Board member, etc.) OR the person who knows the contact

2. Making the Ask - Prepare

- Practice with friends – roll playing will help alleviate nerves
- Utilize a prop – a written statement or bulleted info sheet that summarizes what you're asking for and why (impact)
- Prepare your “elevator speech”

3. Making the Ask – At the Meeting

- USE YOUR INFO to start the conversation
- LISTEN to the prospect's interests, ideas, etc.
- DESCRIBE your organization's needs (concretely) and how the prospect's interests may fit with them
- MAKE THE ASK – “Will you help us by contributing \$1,000
- PAUSE -- Most important part in making the ask is to stop talking

4. Making the Ask – Countering ‘Typical’ Responses

- No, I can't help you
 - Can you help next year? Or
 - Do you have ideas of people to approach
- I can't donate that much
 - Redefine the ask amount or spread over multiple years
- That's a lot of money
 - Discuss other 'like' donations from major donors
 - Reaffirm that it is a lot of money and reaffirm how critical their support would be

4. Making the Ask – Countering 'Typical' Responses

- I need to think about it
 - Needs follow up
 - Schedule a specific date for follow up
- YES, I'll help
 - When can we anticipate the gift?

5. After the Meeting

- Thank you letter
- Call from a board member
- Invite to a tour or gathering on program or project's progress
- Provide written updates and information periodically
- Build the relationship. Don't just meet when you need the next gift

Making the Ask - Errors

- Not asking for the gift
- Not asking for a large enough gift
- Not listening – talking too much
- Not asking questions
- Talking in abstract terms about organization rather than stating how the org impacts its clients
- Not being flexible about what you're offering the prospect
- Not knowing enough about the prospect and their interests, etc BEFORE the solicitation

Making the Ask - Errors

- Asking for the gift too soon
- Speaking rather than remaining silent after asking for the gift
- Settling on the first offer from the donor when you know they can donate much more
- Not cultivating the donor; preparation and relationship building.

Practice Makes Perfect



FACE to FACE Exercise

- Break into groups of two's. One person does the ask for 3 minutes and the other person respond. Then switch roles
- Make the ask
- Tell us one thing you discovered during the exercise and about your prospect
- Prospect – Tell us one thing you discovered about HDSA

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