

ENGAGING YOUR BOARD OF DIRECTORS

Presenters:

Kelley Barnes ■ Kelly Egolf ■ Jackie Hall



How to better understand the role of your Board

Kelly Egolf

Egolf Consulting Services, LLC

Board Member, Santa Fe Community Foundation

Four Duties of Board Service



1) Duty of Care

Being there to make decisions

Making informed decisions

Record keeping, minutes, actions, etc.

2) Duty of Loyalty

Avoiding conflicts of interest

Putting the organization's interests
above personal interests

Four Duties of Board Service



3) Duty of Compliance

Adhering to state and federal laws

Following bylaws and governing policies

4) Duty to Manage Accounts

Assuring the financial accountability

Assisting in the acquisition of resources,
otherwise known as...**FUNDRAISING**



All Boards are NOT Created Equal

What kind of board do you have right now?

What kind of board do they want to be?

What if they don't want to be fundraisers?

The Great Myth



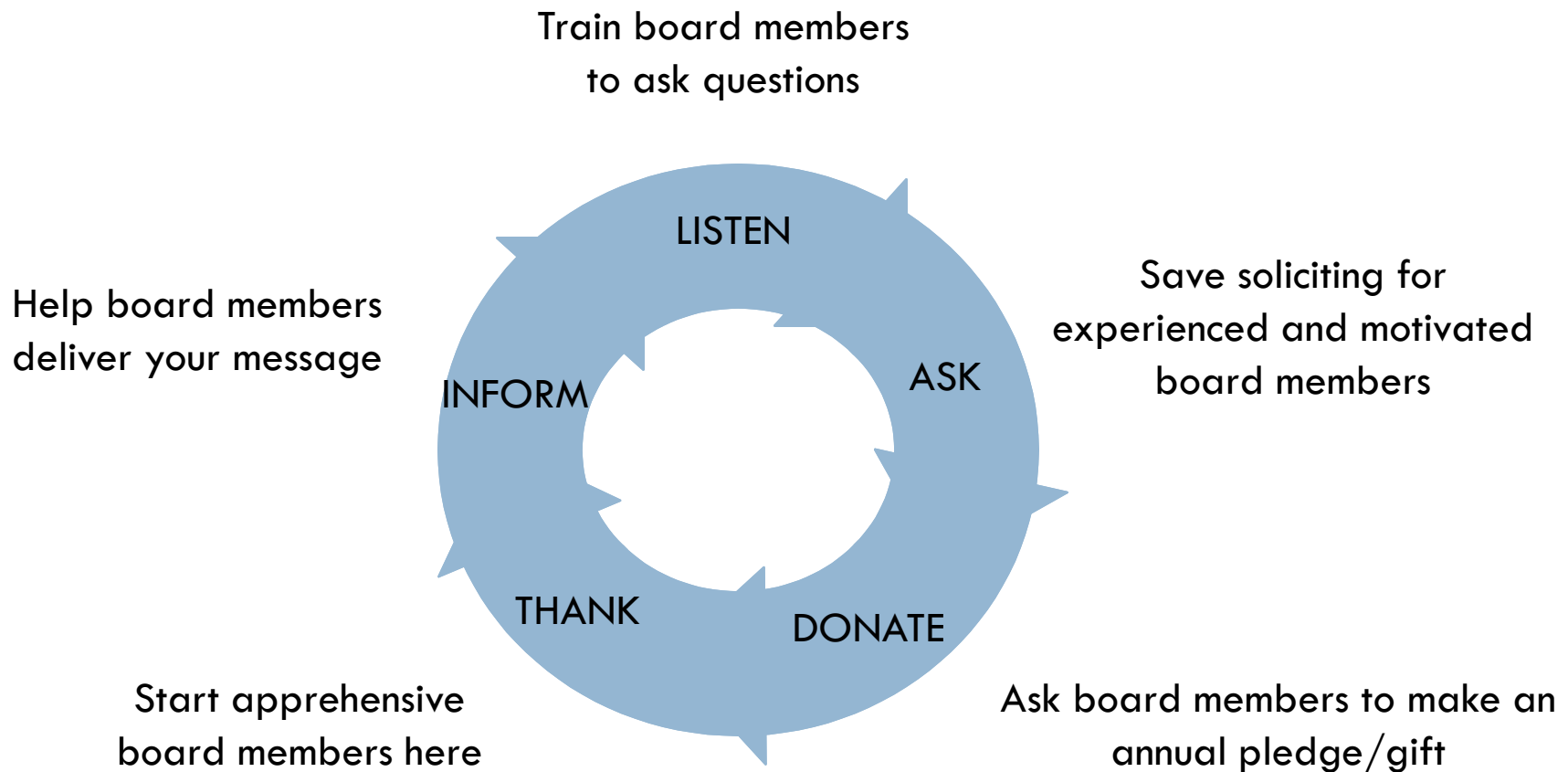
If the equation is

Fundraising = Asking for Money = Resistance

Then change the equation!

Being an Ambassador = Introducing and
Thanking

The Board and the Donor Life Cycle



Being ~~a Fundraiser~~ an Ambassador

Invite others to share the joy you receive from being involved in the organization!

1) Introduce people to the organization

- ▣ Events
- ▣ Mail (newsletters, solicitation letters, invitations to special programs)
- ▣ Phone or email them to follow up mailed invitations
- ▣ Host lunches with the ED

Being ~~a Fundraiser~~ an Ambassador

Getting a board member to make thank you phone calls is a great way to build confidence and makes a great impression on donors.

2) Stewardship

- ▣ Write personal thank you notes
- ▣ Make thank you phone calls as often as possible
- ▣ At events, make a point of thanking three people for their support



And Don't Forget

They can't do it alone.

Keep them informed.

Keep them on task.

Keep them motivated.

It's YOUR job to help them be successful.



Learn how to engage your Board

Jackie Hall

The Nature Conservancy

Begin with...



- Mentors/Buddy System
- In-depth orientation
- On-site visit/staff meetings
- Plan for ongoing education/training

Getting to know you...



Get to know the board member to learn how to best engage them with your organization.

- Cultivate relationships with trustees as you would any current/prospective major donor
 - ▣ Personalize your communication
 - ▣ One-on-one meetings
 - ▣ Extend invitations (inside and outside org.)
 - ▣ Listen to determine areas of interest
 - ▣ Don't rely on Executive Directors/build your own relationship



Trustees of The Nature Conservancy New Mexico

September 2010: Rio Nutria Preserve in western New Mexico

Connect early in tenure



- Financial
- Committee membership
- Will they fundraise?
- Use of expertise/talents
- New skills THEY would like to develop

Not all board members are fundraisers!

Effective fundraisers:

- Commitment
- Contribute
- Asks
- Advocate
- Knowledge

- What are their interests or areas of expertise?
 - Policy
 - Finance
 - Fundraising
 - Communications/marketing
 - Events
 - Other

Keep them engaged



- Send monthly updates/articles of interest
- Share successes/progress
- Ask for help! Examples:
 - Stewardship
 - Proposal review
 - Visits with constituents
 - Opinion/advice
 - Networking
- Follow-up



Ways to include your board leadership in fundraising


Kelley Barnes

National Dance Institute – New Mexico

It's All About Relationships!

- Trust, Confidence and Enjoyment
- Be organized, thoughtful and prepared
- Communicate clearly and often
- Be professional and have fun!


Getting Started

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- Have a clear list of needs – visit with your program staff and get specific!
 - Tailor ask with interest
 - Support materials – Board members like to have something to bring with them on visits
 - Be able to share Impact/Evaluation

Every Board Member can be a Fundraiser!

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- ❑ Stewardship and cultivation
 - ❑ Attend an Event together
 - ❑ Training
 - ❑ Door Openers
 - ❑ Testimonials
 - ❑ Publicize their Gift

Portfolios

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- Meet with each Board Members 2-3 x per year
 - Who do they know that might have an interest/connection to your work
 - Develop an action plan for each donor/prospect
 - Personal notes on invitations, solicitations, newsletters
 - Set up a lunch with the ED; Board Chair
 - Field Trips - Go see the work (tours, etc.)
 - Committee work - volunteering
 - Advice
 - Connect others
 - The ask!

CLOSING QUESTIONS OR COMMENTS?

THANK YOU to our Presenters:

Kelley Barnes ■ Kelly Egolf ■ Jackie Hall

AFP-NM sponsors monthly luncheon programs throughout the year – visit www.afp-nm.org to see our full calendar. Don't miss: A One-Day Workshop with Simone Joyaux, ACFRE on May 23!