



Building a Strong Fundraising Board

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Inspired...
to Action







Nonprofit Fundraising 101

A PRACTICAL GUIDE with
EASY to IMPLEMENT IDEAS & TIPS from INDUSTRY EXPERTS

engaging your board
email . measuring major gifts earned income
impact
online fundraising foundation & events
mobile fundraising government individual
grants donors CRM
run walk ride
community-based fundraising crowdfunding
website donations donor volunteers
social enterprise research
direct mail social in-kind making
media fundraising the ask
corporate hiring development
partnerships staff



DARIAN RODRIGUEZ HEYMAN
with LAILA BRENNER

WILEY

Nonprofit Management 101

A COMPLETE AND PRACTICAL GUIDE FOR LEADERS AND PROFESSIONALS

SECOND EDITION

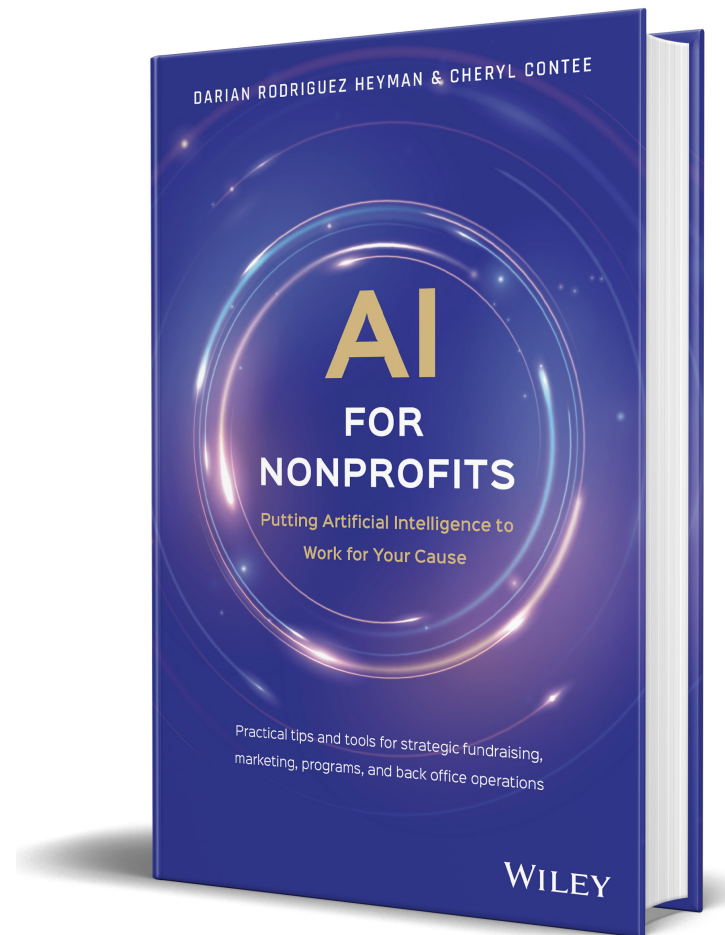
Essential
resources, tools, and
hard-earned wisdom
from fifty-five
leading experts



DARIAN RODRIGUEZ HEYMAN
and LAILA BRENNER

NEW INTRODUCTION BY NEW YORK TIMES BESTSELLING AUTHOR
VAN JONES

WILEY



A Note on Tin Cup Fundraising



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People don't give to you,
they give *through* you.



Kay Sprinkel Grace

Our Agenda

- Why are We Here?
- **Top Tips & How To's**
- Resource Review



Key Finding: 75% of EDs are Leaving in the Next 5-10 Years

THE LEADERSHIP IN LEAVING

by Frances Kunreuther
Phyllis Segal
Stephanie Clohesy

2019

BOOMER SERIES

Daring to Lead 2011

A National Study of Nonprofit Executive Leadership

2001

2006

2011

A Joint Project of
CompassPoint Nonprofit Services
and the Meyer Foundation

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#1 Reason: Fundraising!

#2 Reason: Boards



Why Are We Here?

- **Typical Board Lifecycle:**
 - **In Name Only**
 - **Working Board**
 - **Strategic Board**



Why Are We Here?

- **The Most Powerful Form of Ask...**



Why Are We Here?

- **The Most Powerful Form of Ask...**

Is a Peer Ask



A Peer Ask

- **“I invite you to *join me* in supporting the great work of XXX. I just gave and you should, too!”**



Stage a Thank-A-Thon





Top Tips & How To's: **Board Fundraising**

- **Create a *Rapid Response Donor Acknowledgement Committee***
- **Donor value surges 50% if thanked by a board member within 48 hours**





Top Tips & How To's: **Board Development**

- **5 Go-To Tools:**
 - **Board Member Agreement**
 - **Board Matrix**
 - **Consent Agenda/Calendar**
 - **Annual Survey/Personal Development Plan**
 - **Executive Job Descriptions/Committee Charters**



Top Tips & How To's: **Board Fundraising**

- **Overall Framing:**
 - **Entering an Exciting New Chapter of Impact**
 - **All Thanks to You**
 - **Need to Revisit Board's Highest & Best Purpose**
 - **Our Goal: A Culture of Accountability & Transparency, Where Everyone Knows What's Expected & How the Pieces Connect**
 - **Nothing Forced on You**



Top Tips & How To's: Board Fundraising Board Member Agreement

- **2-3-Page Contract**
- **Plain English**
- **Objective Criteria: Basis for Accountability**
- ***Board-Led* Implementation**



Board Member Agreement

(Name of Organization/Letterhead)

Board Member Agreement TEMPLATE

[Insert nonprofit name here] is a *[insert state of incorporation here]*-based 501(c)(3) nonprofit dedicated to *[insert brief mission statement here]*. To achieve this mission and these goals, we rely on the leadership, insight, and support of our Board of Directors, a visionary group of activated leaders. This Board Member Agreement details the role of our Board, and the responsibilities associated with serving in this capacity.

I, _____ understand that as a member of the Board of Directors of *[Insert nonprofit name here]*, I am fully committed and dedicated to the purpose and mission of the organization and will act responsibly and prudently as its steward.

I understand that my duties and responsibilities include the following:

1. Having completed my three-month trial period, I will serve a ***two-year Board term*** to the best of my ability. I understand that subject to a vote I may be offered a second two-year term, and that I may only be elected to a third two-year term if I am serving on the Executive Board of the organization.



Board Member Agreement

2. I will ***attend 75% of all quarterly Board meetings*** and be available for phone consultation, having read any provided materials, reports, minutes, and the agenda in preparation. I will help develop and oversee the strategy, goals, and good governance of *[Insert nonprofit name here]*'s efforts.
3. I will actively ***serve on at least one committee*** and attend at least 75% of all calls and meetings for any committees of which I am a member.
4. I will make at least ***one site visit per year***, to gain a firsthand understanding of *[nonprofit name here]*'s programs, impact, and client needs. I understand this can relate to any of our many programs.
5. I will commit at least ***five hours per month*** to *[nonprofit name here]* pro bono, including my time at board and committee meetings, as well as any other organizational activities and my participation in fundraising activities and community events where I am representing the organization.



Board Member Agreement

6. I will give what is for me an *annual personal capacity gift*. I may give this as a one-time personal donation each year, or I may pledge to give a certain amount several times during the year. A capacity financial gift is defined as the largest gift I can comfortably make, and one of my three largest philanthropic investments for the year. I understand that Board participation in fundraising campaigns is crucial to our ability to raise money externally, and that as a Board member, *[nonprofit name here]* should be one of my top philanthropic priorities.
7. I will *facilitate at least three introductions per year* to potential financial supporters. These can include donors, foundations, corporate sponsors, Board prospects, or in-kind supporters. I understand on a quarterly basis, the Board will discuss top priorities that would be most helpful to support my efforts.
8. I will actively *engage in fundraising* for this organization in whatever ways are best suited for me and view this as a core Board member responsibility for all directors. These may include individual, corporate, or foundation solicitation, producing and promoting special events, developing fundraising materials, and the like. I will make a good faith agreement to raise as much money as I can for the organization and understand that my fundraising role does not require me making “asks” if I’m not comfortable, and that other directors and staff can play that role if needed.



Board Member Agreement

9. I will ***participate in an annual Board survey***, overviewing my personal goals to advance *[Insert nonprofit name here]*'s work in the year ahead, and sharing what support I require to achieve those. I will also use this forum to share my thoughts on my Board service relative to accepted responsibilities, as well as the performance and areas for potential improvement of the overall Board and organization.
10. I understand that, along with other members of the Board, ***my only direct management responsibility is the selection and supervision of the chief executive***. I will actively participate in their annual performance evaluation. I will respect and support the chief executive's authority, communicate ideas about program or administrative activities to them instead of staff, refrain from making special requests of the team, and avoid discussing personnel matters with staff. I will direct all media inquiries to the chief executive or party designated by the Board on a particular matter.
11. I will act in the best interests of the organization and excuse myself from discussions and votes where I have a ***conflict of interest***.
12. I agree that during my tenure on the Board or in the years following, I will ***not divulge any confidential information***, nor transfer any such confidential information to any third party, nor use any such confidential information for my own purpose or for any purpose other than in connection with my authorized role as a Board member of *[Insert nonprofit name here]*, unless such disclosure shall have been approved in writing in advance.



Board Member Agreement

13. I am *fiscally responsible*, with other Board members, for this organization. I will know what our budget is and take an active part in reviewing, approving, and monitoring the budget and fundraising to meet it.
14. I know my *legal responsibilities and accept the bylaws*. I am responsible to know and oversee the implementation of policies and programs.
15. I will *actively promote* [Insert nonprofit name here] and encourage and support its staff.
16. I will always attempt to *respond promptly* to staff and Board communication. I will *fulfill commitments within agreed-upon deadlines*.



Board Member Agreement

17. If I am not able to meet my obligations as a Board member, I will offer my resignation.

In signing this document, I understand that no quotas are being set, that no rigid standards of measurement and achievement are being formed. Every Board member is making a statement of faith about every other Board member. We trust each other to carry out the above agreements to the best of our ability.

Signed _____

Board Member

Date

Signed _____

Board Chair

Date



Top Tips & How To's: Board Fundraising Board Matrix

Categories		Jane Doe	John Smith	Maria Vazquez	TOTALS:
Expertise & Capacity					
	Environment & Sustainability	1	1	1	3
	Women's Leadership	1			1
	Public Relations		1		1
	Nonprofit Governance	1			1
	Lawyer		1		1
	Accountant/Finance Executive	1	1	1	3
	High Net Worth				0
	Available 10 vs. 2 Hours/Month	1	1	1	3
Connections					
	Major Donors	1			1
	Foundations	1	1		2
	Celebrities		1		1
	Academia		1	1	2
Diversity					
	Native American	1		1	2
	Latino		1		1
	Women			1	1
	Youth (< 30)		1		1
	San Francisco Bay Area				0
	International	1			1

Consent Agenda



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You want advice, *ask for money*

You want money, *ask for advice*



David Battey
President of Youth Volunteer Corps
of America



Top Tips & How To's: Board Fundraising Consent Agenda

- **Organizational Dashboard**
- **Executive Summaries**
 - **2 Paragraph Max**
 - **All FYIs & Updates, Including Red Flags**
- **Streamlined Minutes**



Top Tips & How To's: Board Fundraising Organizational Dashboard

- **Identify 6 - 12 KPIs**
 - **Operations *and* Programs**
 - **Red / Yellow / Green Range**
 - **Fleshed out in Executive Summaries**



Organizational Dashboard

(LOGO)	Organizational Dashboard				As of: 1-Apr-21
	● CELEBRATE	● WATCH	● ACT		
1. Financial Management					
Key Performance Indicator	Target	YTD Target	YTD Actual	Last Period	Ranges
Total Revenue	\$ 12,800,000.00	\$ 10,500,000.00	\$ 11,000,000.00	\$ 10,250,000.00	■ 95+% of YTD Goal; ■ 75-94%; ■ < 75%
Total Expenses	\$ 11,500,000.00	\$ 9,500,000.00	\$ 8,500,000.00	\$ 8,100,613.00	■ < 90% of YTD Goal; ■ 91-105%; ■ > 105%
Accounts Receivable	\$ 1,300,000.00	\$ 1,300,000.00	\$ 3,447,729.00	\$ 2,847,729.00	■ < 90% of YTD Goal; ■ 91-105%; ■ > 105%
Runway/Rainy Day Account (in Months)	6	6	7	6	■ 6+; ■ 4-5; ■ < 4
2. Board of Directors					
Key Performance Indicator	Annual Target	YTD Target	YTD Actual	Last Period	Ranges
Board Giving	100%	65%	50%	35%	■ 95+% of YTD Goal; ■ 75-94%; ■ < 75%
Board Fundraising Introductions	45	35	36	30	■ 95+% of YTD Goal; ■ 75-94%; ■ < 75%
Board Candidates in the Pipeline	8	3	2	2	■ 95+% of YTD Goal; ■ 75-94%; ■ < 75%
3. Fundraising					
Key Performance Indicator	Annual Target	YTD Target	YTD Actual	Last Period	Ranges
Unrestricted Funds Raised	\$ 1,258,000.00	\$ 1,153,166.67	\$ 1,186,861.00	\$ 854,780.00	■ 90+% of YTD Goal; ■ 70-89%; ■ < 70%
Total Raised from Grants	\$ 2,500,000.00	\$ 1,500,000.00	\$ 1,800,000.00	\$ 1,500,000.00	■ 95+% of YTD Goal; ■ 75-94%; ■ < 75%
Individual Donor Income	\$ 50,000.00	\$ 45,833.33	\$ 62,535.00	\$ 36,391.00	■ 90+% of YTD Goal; ■ 70-89%; ■ < 70%
Donor Retention Rate	80%	65%	50%	40%	■ 95+% of YTD Goal; ■ 75-94%; ■ < 75%
Upgraded Donors	40	30	22	20	■ 95+% of YTD Goal; ■ 75-94%; ■ < 75%



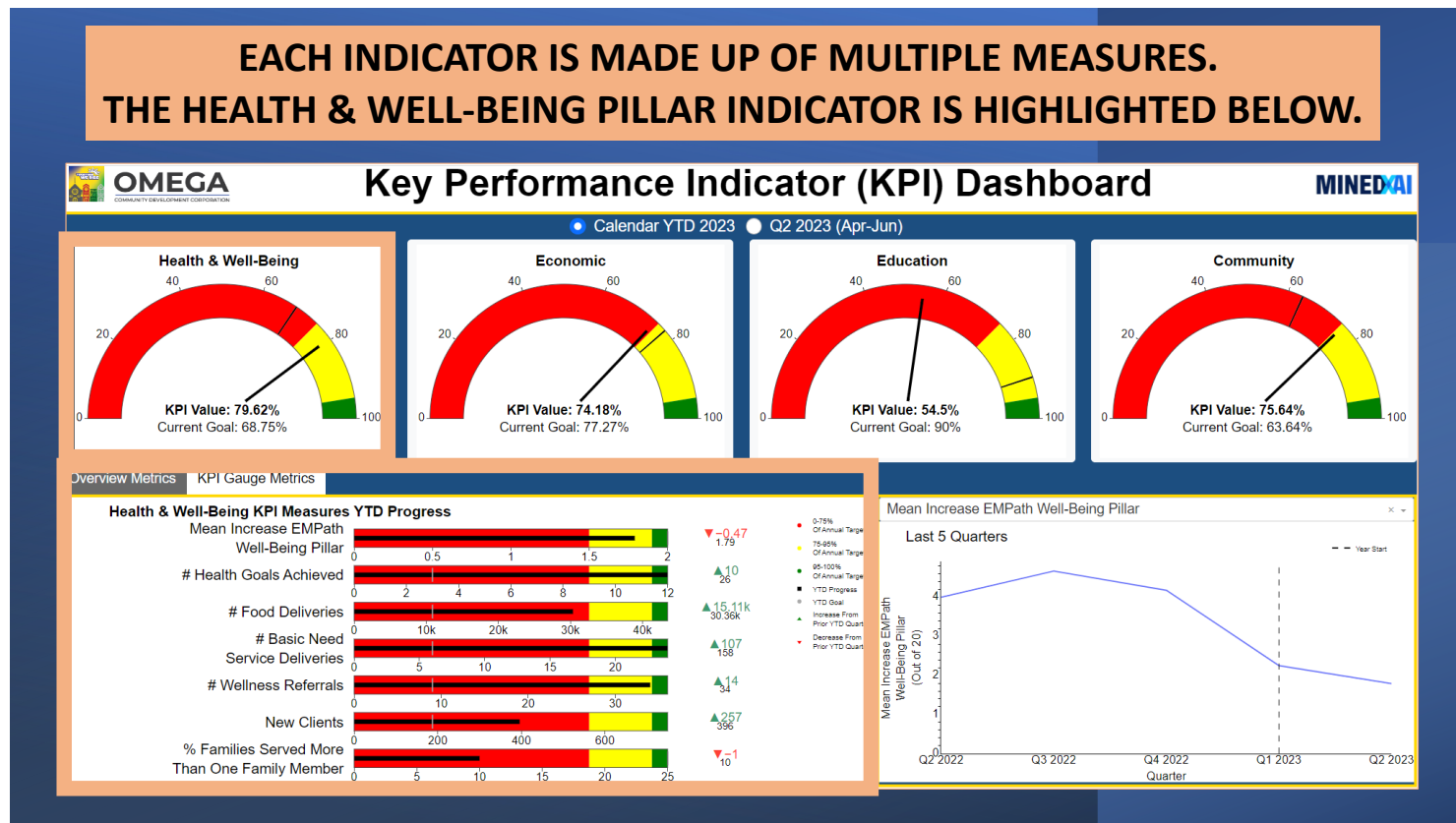
Organizational Dashboard

(Insert Logo Here)		Organizational Dashboard			AS OF: DATE	
			CELEBRATE	WATCH	TAKE ACTION	
1. Financial Management						
Key Performance Indicator	Annual Target	YTD Target	YTD Actual	Last Period	Ranges	Definitions/Notes (To be Hidden)
Revenue	\$18,753,513	\$16,032,898	\$19,516,830	\$14,329,062	95+% of YTD Goal; 75-94%; < 75%	
Expenses	\$18,695,482	\$15,965,618	\$18,617,128	\$12,742,667	< 90% of YTD Goal; 91-105%; > 105%	
Accounts Receivable	\$1,300,000	\$1,300,000	\$3,447,729	\$2,350,422	< 90% of YTD Goal; 91-105%; > 105%	
Board Designated Reserves (in months)	3.0	2.3	1.2	1.4	3+; 1-2; < 1	



Organizational Dashboard

EACH INDICATOR IS MADE UP OF MULTIPLE MEASURES.
THE HEALTH & WELL-BEING PILLAR INDICATOR IS HIGHLIGHTED BELOW.





Resource Review

boardsource.org

boardnetusa.org

chandlerinstitute.org/governancematters

<https://www.volunteermatch.org>

<https://www.idealists.org>

theboardmatch.net

BlueAvocado.org



Thank You!

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