



How to Build Your Most Dynamic Development Leadership Team... The Board

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A Culture of Philanthropy

- To have an environment where staff and the entire board foster fund development in a cohesive partnership.



Topics to be Discussed

- The ideal board
- Effective recruitment of board members
- Finding potential board members
- Setting board expectations
- Board member orientation
- Committees
- Board member skill development
- Board interaction with staff
- Fundraising is everybody's business

The Ideal Board...

- Should represent the community which the organization serves
- Should define, protect, and advance the organization's mission
- Should safeguard the assets (human, financial, and property) of the organization
- Should self recruit, in partnership with Executive Director
- Should serve as Ambassadors on behalf of the organization
 - Properly represent the organization in the community
 - Keep the organization in the front of their minds and have the tools to promote it in the community
- Should ensure adequate resources to carry out the mission

Recruitment

- Create a nominating committee to perform the majority of the board recruitment
- Assess the characteristics, skills, experience and background of your current board and determine gaps
 - Areas of board expertise may include: nonprofit management, fundraising, marketing, event management, human resources , etc.
- Recruit from various sources
- Recruit more people than you think you need
- A candidate who is not interested in board service may be interested in donating, time, talent or treasure

Finding Potential Board Members

Look for potential Board Members through:

- Patrons, donors, and contributors to the organization
- Current volunteers who demonstrate leadership
- Organizations/businesses involved in your sector
- Religious and service organizations
- City government
- Professional associations
- Chambers of Commerce, United Way
- Fraternity or sorority groups, alumni associations, colleges and universities
- Press or media contacts

Board Expectations

- Legal responsibilities
- Time commitment
- Workload commitment
- Term limits
- Financial contributions
- Help with fundraising
- Being an advocate in the community
- Participating in events
- Use of their special skills
- Signing the board agreement or contract



Board Member Orientation

- Create a binder with necessary organizational information
- Update bylaws and other pertinent documents
- Make the orientation separate from any other meeting and facilitated by a designated Board representative and the ED
- Introduce other Board members with bios and contact information, and an update on their involvement or position on the Board
- Recent financial organization information
- Committee breakdown and responsibilities
- Minutes from the last few meetings to help build awareness
- Provide an update on strategic plans, bylaws, policies etc.

Committees

- Committees improve board effectiveness by providing leadership and guidance in specialized areas
- Committees should focus on single issues and work more directly on the issue than the full board
- A minimum of three and a maximum of eight members is generally plenty for most tasks and manageable
- The ideal Development Committee:
 - Actively involved in fundraising
 - Is not just a committee that is reported to
 - Fully supports the development department
 - Works collaboratively with the Executive Director and development staff and does NOT micro-manage
 - Takes a leadership role in development

Skill Development

Ongoing education for board members is necessary to improve their effectiveness. Trainings and conferences should be scheduled and costs included in the operating budget.

Topics of Interest for Boards

- How to conduct effective meetings
- Fundraising training sessions with an outside facilitator
- Major gift cultivation, planned giving and endowments
- Liability and insurance issues
- Public speaking skills
- Trends in the industry



The Board's Interaction with Staff

- Communication is key: Board President and Executive Director should develop a solid relationship and communicate weekly
- Executive Director reports to the board
- The Development Professional reports to the Executive Director only
- The Executive Director and the Development Professional must show a united front
- Staff should work out any issues outside of the board meetings
- The Development Professional should always be invited to attend all board meetings
- Boards govern and fundraise, staff manage daily operations

Fundraising is Everybody's Business

- Fundraising MUST be part of a board's role
- Boards can help fundraise in the following areas:
 - Grants
 - Individual Donors and Major Gifts
 - Corporate Sponsorships
 - Annual Fund
 - Planned Giving & Endowments
 - Special Events
- Fundraising is all about relationship building
- Fundraising takes time – there is no magic wand

In Review

- Building a culture of philanthropy
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- Fundraising is everybody's business



THANK YOU!

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