



THE  
**COMPASS GROUP**  
THE RIGHT DIRECTION IN FUNDRAISING

# **Effective Boards Aren't Built In A Day!**

Main Street Oakland County Michigan  
January 22, 2020



# Robert Bull, President



- 25+ years as a fundraising and board development consultant
- Certified Fundraising Executive (CFRE)
- Former Chief Development Officer for the National Trust for Historic Preservation
- In conjunction with NTHP and NMAAHC, worked with more than 125 African American Historic Sites and Cultural Heritage organizations
- Graduate of Goucher College and Antioch University New England and currently a doctoral student in Leadership and Change.

**Our mission is to build  
the capacity of our  
clients to successfully  
raise more money  
every day.**





***“We are one, our cause is one, and we must help each other; if we are to succeed.”***

-Frederick Douglass

North Star, December 3, 1847

**1 minute to  
plan.**

**20 seconds  
to present!**

- 1. Name of organization**
- 2. Mission (What do you do?)**
- 3. What do you want to learn about “Effective Boards?”**

**What  
business are  
you in?**

**Very quickly, in one word,  
please describe the business of  
your board.**

**“My board is in the  
business of...”**

**Think!**

**What  
business are  
you in?**

**Very quickly, in one word,  
please describe the business of  
your board.**

**“My board is in the  
business of...”**

**You have 1 minute as a group  
to agree on one word for your  
organization!**

**What  
business are  
you in?**

**Very quickly, in one sentence,  
please describe the business of  
your board.**

**“My board is in the  
business of...”**

**Think and write quickly!**



**What  
business are  
you in?**

**Very quickly, one sentence,  
please describe the business of  
your board.**

**“My board is in the  
business of...”**

**You have 10 minutes as a group  
to agree on one sentence for  
your organization!**



## What business was he in?

*The quality of a leader is reflected in the standards they set for themselves.*

**--Ray Kroc**





# Recruit the Team

- Why do you need to expand the team?
- Who's on the team already?
- How often does the team practice?
- When does the season start?
- How much playtime do I get?
- How expensive is my uniform and equipment?
- What positions do I get to play?
- When is the game over?



# What Do You Want From Board Members?

- Understand their purpose
- Know the difference between Governance vs. Management
- Ensure the organization is a strong nonprofit
  - Financially Secure
  - Excellent Product
  - Strong Board



# Expectations

Specific tasks that help board members fulfill their responsibilities as volunteer leaders:

- Attend every meeting
- Participate in the committee structure
- Actively participate in the life of the organization
- Ensure adequate resources are available



# Expectations

- Actively participate in the fundraising process
- Promote the organization in their spheres of influence
- Provide financial support
- Provide philosophical support

When NASA first started sending up astronauts, they quickly discovered that ballpoint pens would not work in zero gravity. To combat this problem, NASA scientists, as part of a \$12 billion development program, spent a decade and created a pen that writes in zero gravity, upside down, on almost any surface including glass and at temperatures ranging from below freezing to over 300 C.

The Russians used a pencil.





# What Do I Need From You? What do you need From Me?

- Clear understanding
- Role on the team
- Specific responsibilities
- Realistic goals
- Short-term accomplishments



# Typical Board Job Descriptions

- Written Job Description
- Clear Expectations for Performance
  - Attendance
  - Committee Responsibility
  - Philanthropic Support
  - Philosophical Support
  - Time Requirement



# Specific Board Job Description

- Common Responsibilities
  - Attendance
  - Committee Responsibility
  - Philanthropic Support
  - Philosophical Support
  - Time Requirement
- Specific Responsibilities (examples)
  - Host fall event for Legacy Society
  - Introduce ED at a Chamber Breakfast
  - Solicit Chemacore and Branch Brothers

**Let's build a  
collaborative  
job  
description!**

**Using the Collaborative Job  
Description Worksheet,  
outline/offer what you can do  
to advance the mission of the  
organization and briefly list  
what you would like to see  
outlined/offered by members  
of your board.**



## Divide and Conquer

The best division of labor for a Board of Directors/Trustees is:

- A. Standing Committee
- B. Task Force
- C. Workgroup/Teams
- D. Individual Responsibilities



Finance  
Fundraising  
Programming



# Finance

- **Oversee budget**
- **Accountability for funds**
- **Ensure financial controls**
- **ED/Personnel Policies**
- **Facility Operations**



# Fundraising

- Develops fundraising plans
- Leads membership/annual fund efforts
- Leads identification and solicitation of external resources
- Leads marketing and public relations efforts
- Coordinates special events





# Programming

- Advocates the organization's mission
- Guides development of service delivery
- Creates and implements new programs and services
- Link between the board and all (non-fundraising) external programming



## A Bit on Succession Planning

A process of determining critical roles within an organization, identifying and assessing possible successors, and providing them with the appropriate skills, experience, and consideration for present and future opportunities.

- Most organizations do not attempt it
- Few organizations do it well
- Organizations that do, sustain leadership, culture, and existence.



## Each One Teach One (or Two)

- Board members are responsible for replacing themselves.
- Each board member is charged with identifying and introducing to the organization someone of like (and needed) skills sets and talents.
- The organization formalizes vehicles/systems where “board buddies” can foster and strengthen their relationships with fellow board members and the organization.



## A Bit on Strategic Planning for Fundraising

- Is there a plan for how your organization will acquire its philanthropic revenue?
- Are the objectives, goals, and action items measurable?
- Does everyone have a role/responsibility within the plan?
- Can the plan be achieved over a specified period of time?



# Myths About Fundraising Plans

- Big Documents
- Big Organizations
- Big Numbers
- Big Prospects
- Big Results
- **Big Disappointments!**



# Truth About Strategic Fundraising Plans

A thoughtful, strategic, and organized series of goals, objectives, and action items over a period of time to guide fundraising programs (or activities) that advance the philanthropic well-being of the organization.



# Describe Your Fundraising Plan

Tentative

Incidental

Accidental

**Intentional**

(with efficiency and effectiveness)



# Create a Fundraising Plan

|  |   |
|--|---|
| <b>Staff and Volunteer Leadership</b>                      | <b>Philanthropic Potential/<br/>Prospect Management</b> |
| <b>Case for Support<br/>Communications<br/>Cultivation</b> | <b>Philanthropic Environment<br/>Mechanics</b>          |





# Fundraising Plan

|            | <b>Volunteer Leadership</b> | <b>Philanthropic Potential</b> | <b>Case/ Communication</b> | <b>Back of House Mechanics</b> |
|------------|-----------------------------|--------------------------------|----------------------------|--------------------------------|
| BIG Goals  | X                           | X                              | X                          | X                              |
| 2017 Goals | X                           | X                              | X                          | X                              |
| 2017 Q1    | *                           | *                              | *                          | *                              |
| 2017 Q2    | *                           | *                              | *                          | *                              |
| 2017 Q3    | *                           | *                              | *                          | *                              |
| 2017 Q4    | *                           | *                              | *                          | *                              |
| 2018 Goals | X                           | X                              | X                          | X                              |
| 2019 Goals | X                           | X                              | X                          | X                              |
| 2020 Goals | X                           | X                              | X                          | X                              |



## Legacy of Board and Staff

- Leave something behind
- As a result of your tenure how will the organization be better able to:
  - Serve its constituencies
  - Meet the challenges ahead
  - Expand/Improve its services
- Always thinking along the lines of:
  - Long range plan
  - Stronger board
  - Financial security



# The Perfect Ask©

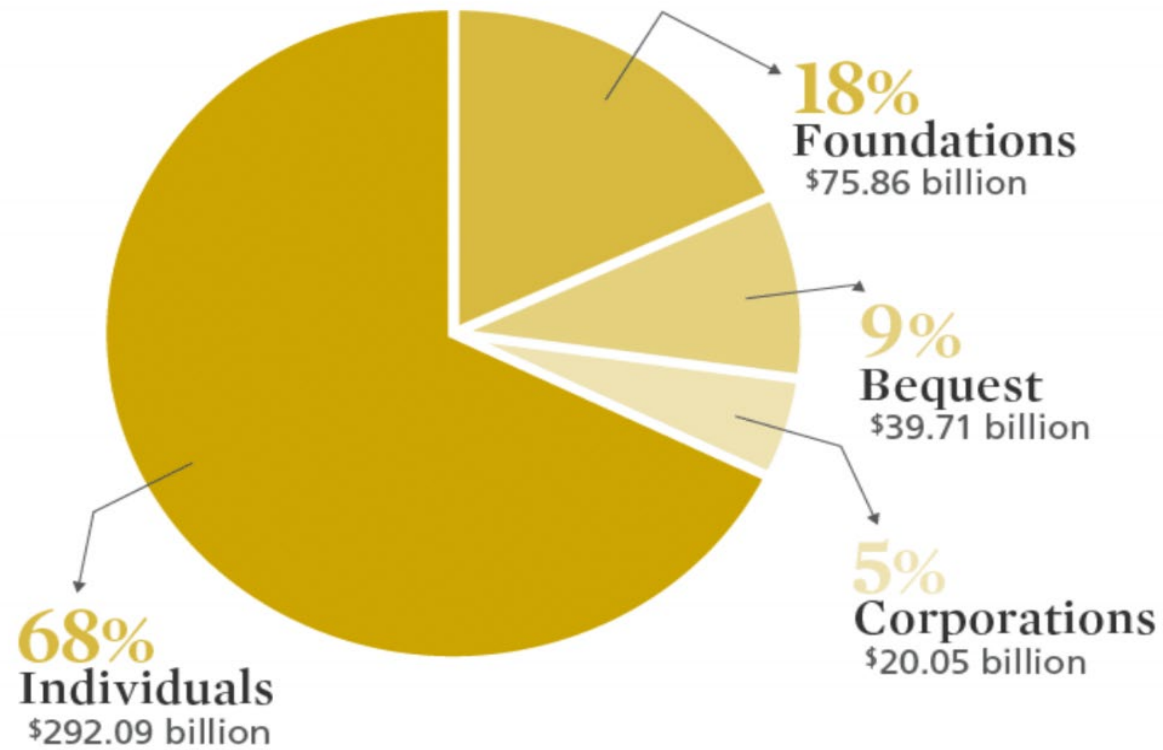
1. Before the Solicitation
2. Scheduling the Solicitation
3. Small Talk vs Storytelling
4. The Perfect Ask!
5. Closing the Deal
6. The Unexpected: Trouble Shooting on the Fly

**The Perfect Ask©**  
Solicitation Training for Staff and Volunteers  
December 14, 2020

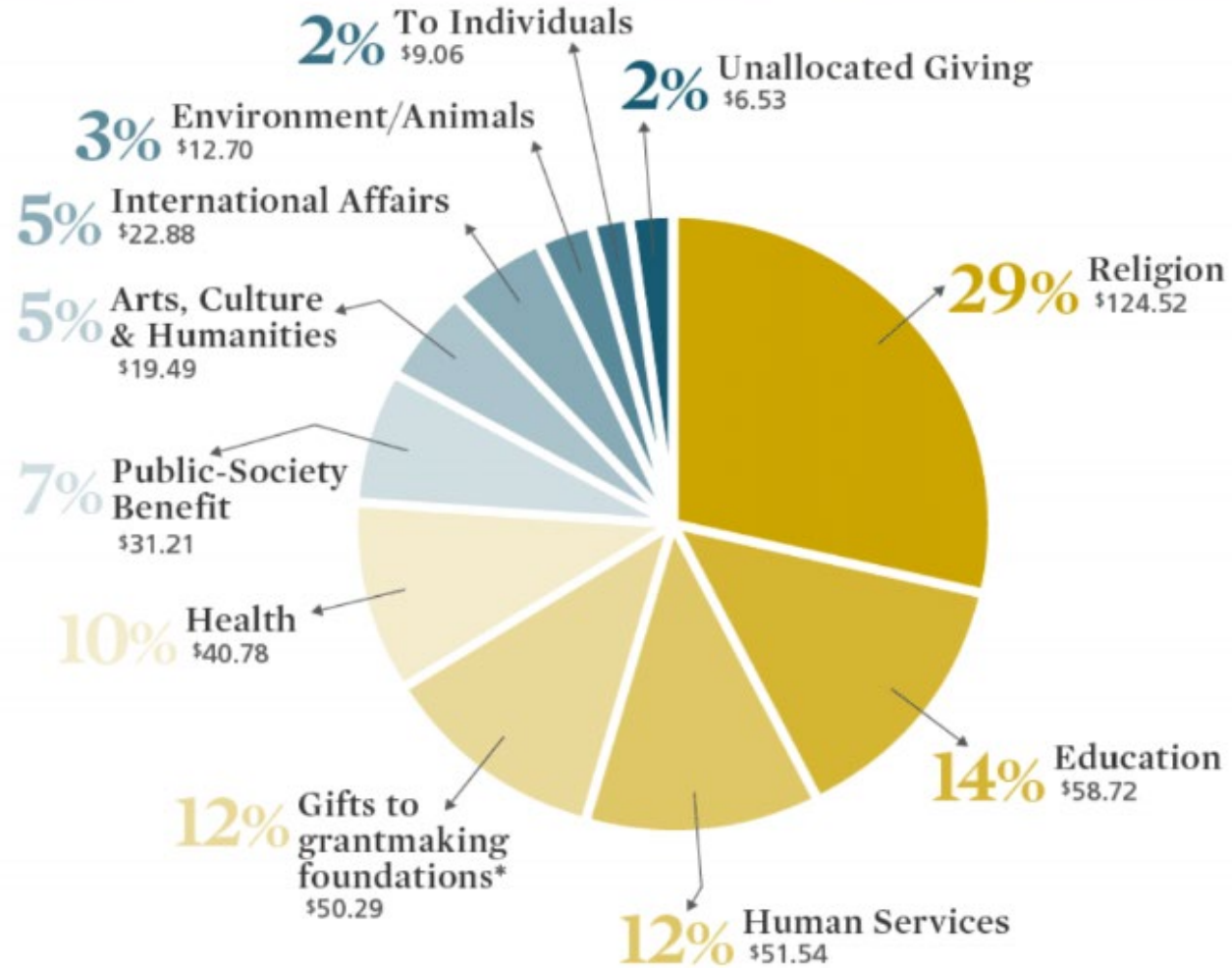
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**In 2018,  
How much was given away  
to not-for-profit institutions  
in the US?**



2018  
Total  
Contributions:  
**\$427.71 Billion**



2018  
Total  
Contributions:  
**\$427.71 Billion**

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**Our mission is to build the  
capacity of our clients to  
successfully raise more  
money every day.**



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