

# The NONPROFIT ACADEMY

*TheNonprofitAcademy.com*

## PRESENTS

### GET YOUR BOARD ENGAGED NOW!

*with Abbie von Schlegell*

## #npapresents

# Get Your Board Engaged, NOW!

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**REFOCUS ON YOUR MISSION!**

**SHOW UP!**

**MORE THAN MONEY,  
MORE THAN TIME**

# Defining a AAA Board

- A board with a AAA Rating is one where every board member is motivated to be an Ambassador, Advocate and/or Asker – tapping into board member motivation and offering assignments drawn from the strategic plan that are specific and geared to the board member's interest and commitment

# Roles Board Members Play

- Ambassadors
  - Making friends, creating connections for the nonprofit
  - Building relationships
- Advocates
  - Making the case (formal and informal)
  - Assisting with solid board recruitment
  - Reaching out and connecting with legislators
- Askers
  - Making the ask
  - Acting as “Front line” fund raisers
  - Promoting bills in government sources

# Ambassadors

- A role everyone needs to play
- Starring roles in cultivation of prospective donors and stewardship of continuing donor-investors, friends, community leaders
- Need to be well oriented and coached in the message
- Masters of the “elevator speech” (and the “elevator question”)
- Catalysts for donor-investor renewal
- Are all of your board members confident Ambassadors?

# Advocates

- At work or in the car-pool – these individuals are strategic in their information sharing
- They may also advocate for your organization on a more formal basis with government, another organization with which you are partnering or an institutional funder
- Are informed not only of the case for support, but also are well integrated into your strategic plan and vision
- Are well coached on desired results of the advocacy and handling objections
- Who on your board is or might be an Advocate?



# Askers

- Enjoy asking
- Well informed, well trained
- “Matched” with prospective donors (or current donor-investors) for maximum possibility of success
- Teamed with another board asker or staff leader
- Staff organizes the ask so the Asker’s focus can be on the single purpose of getting (or renewing) the gift
- Benefit from the work of the Ambassadors and Advocates
- How many confident Askers are on your board?

# The AAA Rating

- Some board members will do it all
- Most board members excel at one or two
- Motivation is increased when board members are assigned to roles that draw on their skills and are in their “confidence zone”
- A AAA program on your board engages each member in a role that contributes to your organization’s success and helps them feel respected and engaged
- As motivation increases, you will find board members moving among the roles – even to Asker!

# Fears of Nonprofit Boards Today

- **Fear #1:** Fundraising is uncomfortable and feels like begging.
- **Fear #2:** Many people are losing their jobs; it feels wrong to ask for money for our organization. What if the person doesn't have money to give or the foundations are using the money for other nonprofits?
- **Fear #3:** We don't want to bother our funders when they are going through so much right now too.

# After you've faced your fears, what else can a strategic board do today?

- **Prioritize development/fundraising!**
  - Especially, do not lay off this staff. They can be the front line!
- **Develop a compelling case for support**
  - *“How does our mission contribute to improving this environment?”*
  - Memorize this answer – get training if necessary!
- **Become a believer and user of social media**
  - a GREAT way to get information out about your mission and services
- **Educate the board about donor advised funds**
  - Thousands of Americans have these funds; and gifts are increasing now from them

# Tools to Build AAA Confidence

- Training and coaching
- Staff and board leadership support, feedback and encouragement
- A “tool kit” – including (but not limited to) fact sheet, elevator speech/question, stories from your organization, objections/responses they may confront, financial statements, staff and board lists with annotation, organizational funding priorities, etc.

# Motivating a AAA Board

- How to keep the confidence strong
  - Board, staff and non-board volunteer training and orientation
  - Steady internal marketing and communication about the impact of your programs on the community
  - Positive feedback – showcase successes and encourage people to keep engaging people
  - Invest in it: retreats, materials

# Motivating a AAA Board

- Encourage each other (board and staff) to...
  - Be a champion and create champions
  - Be a leader and create leaders
  - Be a steward of investments and investors
  - Believe in philanthropy: voluntary action for the public good, based in shared values
  - Market your successes in your community

# Use Board members' connections in advocacy and philanthropy

- Reach out to your donors, friends of Board members, employers, vendors to find help, gifts, referrals
- Strengthen connections to legislators, local business leaders, other nonprofit leadership
- Board members can make calls, can write letters, can send emails **All from Home**
- **Board members should always coordinate with staff before doing these things!**



# Measuring AAA Effectiveness

- Number of contacts Ambassadors make – and tell you about! Create an easy way to relay information to your prospect files.
- Success of Advocacy: whatever the task assigned, was it accomplished? did it have the desired results?
- Success of the Asker is the easiest to measure
- All three need to be honored: SOS

# Creating a Culture of Philanthropy: Board-Staff Partnerships Are Key

- Set AAA standards for volunteer service, volunteer board composition, commitment and roles
- Be sure staff understands and respects the potential and the limitations of volunteer/board member time, involvement and commitment
- Be sure board members understand the boundaries with staff but views them as AAA partners
- Forge partnerships through trust, respect, understanding of mission, common vision, shared values
- Engage the full staff and leadership team

# Board Management is Critical

- Board's relationship with the ED/CEO critical
- Board and Senior Management a partnership
- Matching Board composition with financial model
- Be clear on where Board role starts and ends

# Critical Role of Relationships

- The goal is not just to bring in money and commitment: it is to engage long-term investors who will grow with us
- Social investments are made because the investor wants a result: the staff and board broker the gift, but the results happen throughout the organization
- Your entire board and staff are part of the relationship-creation team

# Crisis Communications: board needs to know how to access these plans

- a media strategy, including a press kit with facts about your organization
- logistics for convening an emergency board meeting
- contact information for key stakeholders (leadership, donors, members, government, media, policymakers, partnering organizations, etc.)
- essential policy statements
- talking points to frequently asked questions
- Be Prepared for last minute phone calls, responses to State press conferences, Governor's announcements

# Stay Connected and In Touch

- Board Chair and Executive Director: regular conversations, email, Zoom, copied on communications
- Keep strong communication with all Board members
- Don't "Go it Alone"
  - Both the ED and the Board chair must be delivering the same messages
- Consider a Task Force, to assist with communications, problem solving, quick research for answers
  - Could include non-Board members, donors, volunteers
- Maintain strong Committee activities and document everything!

# Maintain Roles of Board & Management

- Be aware of MA state laws re nonprofit Board activities
- Board should not be involved in any staff matters
- Staff should attend Board meetings; particularly ED and often DOD and Finance Director
- Deliver Board materials in advance; use Drop Box or Board portal; thus, Board members prepared in advance
- Establish emergency protocols for Board and Staff

# The time to Plan is Now

- Of course, the plan was to do a strategic plan next fall, next year, in 2021, BUT
- You want to be doing Scenario planning:
  - stories about how the future might look for your organization
  - in scenario planning, we ask “What if?” We do not need to become prophets. Assemble possible outcomes with differing circumstances
- Consider both internal and external factors or both together



# How to engage in scenario planning

1. Identify external uncertainties
  - COVID 19, economy, unemployment....
2. Identify internal uncertainties
  - Decisions on hiring, whom you serve, funding losses and opportunities
3. Explore multiple, alternative futures
  - Together with staff, imagine different scenarios: discuss challenges and new chances
  - Actually draft the budgets and program changes you might make; Review

**Scenarios are not predictions, but rather possibilities to plan for and explore**

## It is Time to Step up your Fundraising & Engagement

- Be courageous, recognize and understand the landscape
- Identify one small action you can take to improve the effectiveness of your board. Help your organization.
- Prioritize fundraising in service to your mission, your programs and your constituents!
- Help to plan for the next crisis, even though we are not out of this one yet
- Become more engaged with your organization

**You may not like it, but your organization needs your help now!**

QUESTIONS?

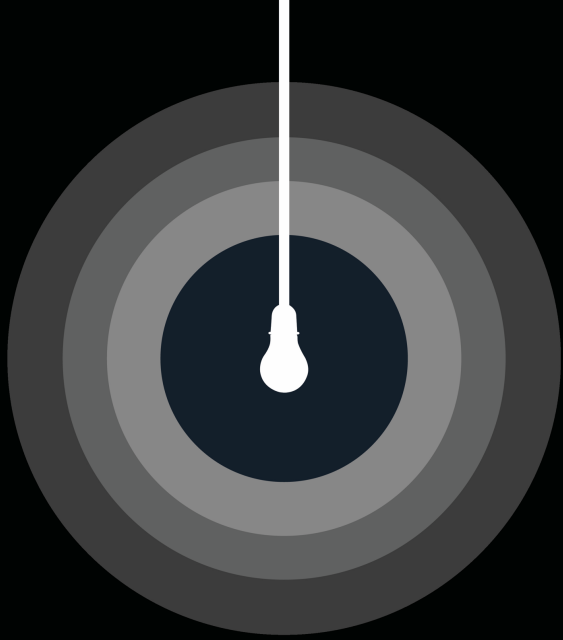
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**Keep The Conversation Going!**

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