



Nonprofit Leadership Today: Expectations of Board members in attracting philanthropic investments

Presented by:

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Leadership and Philanthropy

“Philanthropy is a business, and much more. It embraces hopes and dreams, it is a personal trust, it tests the integrity of the organization and the goodwill of everyone involved. Any act of philanthropy, any governance of a non-profit organization must be way beyond reproach.”

Frantzreb, Arthur C. , Not on this Board You Don't: Bonus Books, Inc., Chicago 1997



Model Leaders

- Accomplish a mission, set definite and measurable goals from studied demographics, plans, and wise counsel.
- Anticipate and prepare for obstacles deterring steady, positive progress.
- Develop initiatives in creative points of measurable growth.



Model Leaders

- Take risks and learn lessons on how to meet and capitalize upon new risks.
- Communicate ideas, ideals, vision, and dreams to others in persuasive ways so that they join the growth process.
- Listen by active hearing, not prejudging results.



Model Leaders

- Encourage trust, confidence, reliability among those who are vital to progress.
- Unlock the locked; dream the impossible; accomplish the unprecedented in sequential steps.
- Explain, teach, develop a process, understand others and show them the way.



Dynamic Boards

- Role of the Board:
 - Planning and Policy Decision
 - **Financial Development**
 - Monitoring and Sanction



Dynamic Boards

- **Function of the Board:**

- Formulate and approve long range goals and objectives and monitor their achievement
- Formulate and adopt policies
- Select, employ and periodically assess the CEO
- **Develop financial resources for achieving goals**
- Adopt and monitor the agency's operating budget, financial plan and insurance program
- Perform its legal responsibilities
- Protect the assets of the organizations
- Form linkages with other organizations
- Interpret the agency to the community
- Maintain affiliation and participation in the agency's larger organization and support structure



Dynamic Boards

- **Unique Contributions of Board and Committee Members:**
 - Knowledge and understanding of the needs and potentials of the community
 - Special abilities, skills and insights which the agency could never purchase
 - Influence for attracting financial resources, human resources and public resources
 - Ability to commend the agency to the community
 - Objective and capacity for critical review
 - Credibility and community confidence in the agency and its work



Dynamic Boards

- **Unique Contributions of Staff:**

- Knowledge of the traditions and ideals of the agency
- Technical skill in agency work
- Ability to unite people and to bridge between cultures
- Knowledge of resources that can enlarge the possibilities of agency work and skill in making such resources available
- Alertness to current and future relevant changes in the larger environment and competence in relating others to the task of meeting them
- Ability to interpret board planning and policy decisions throughout the agency



Where it Begins...

Leadership – Speaking with One Voice:

- Board of Trustees
- President/CEO
- Director Development
- Staff
- Volunteers



Board Responsibilities in Fundraising

- Make personal financial commitment to the organization
- Give commensurate with ability
- Provide leadership/time to fundraising
- Develop a plan and set goals
- Support fundraising efforts through cultivation, solicitation and follow up



Board Responsibilities in Fundraising

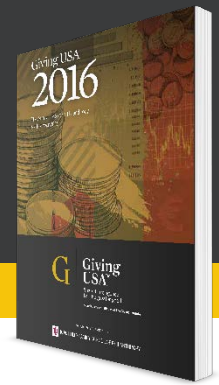
- Evaluate and provide necessary staff and resources to fulfill development plan
- Determine need for outside help
- Monitor fundraising progress against goals
- Keep abreast of trends and techniques in fundraising



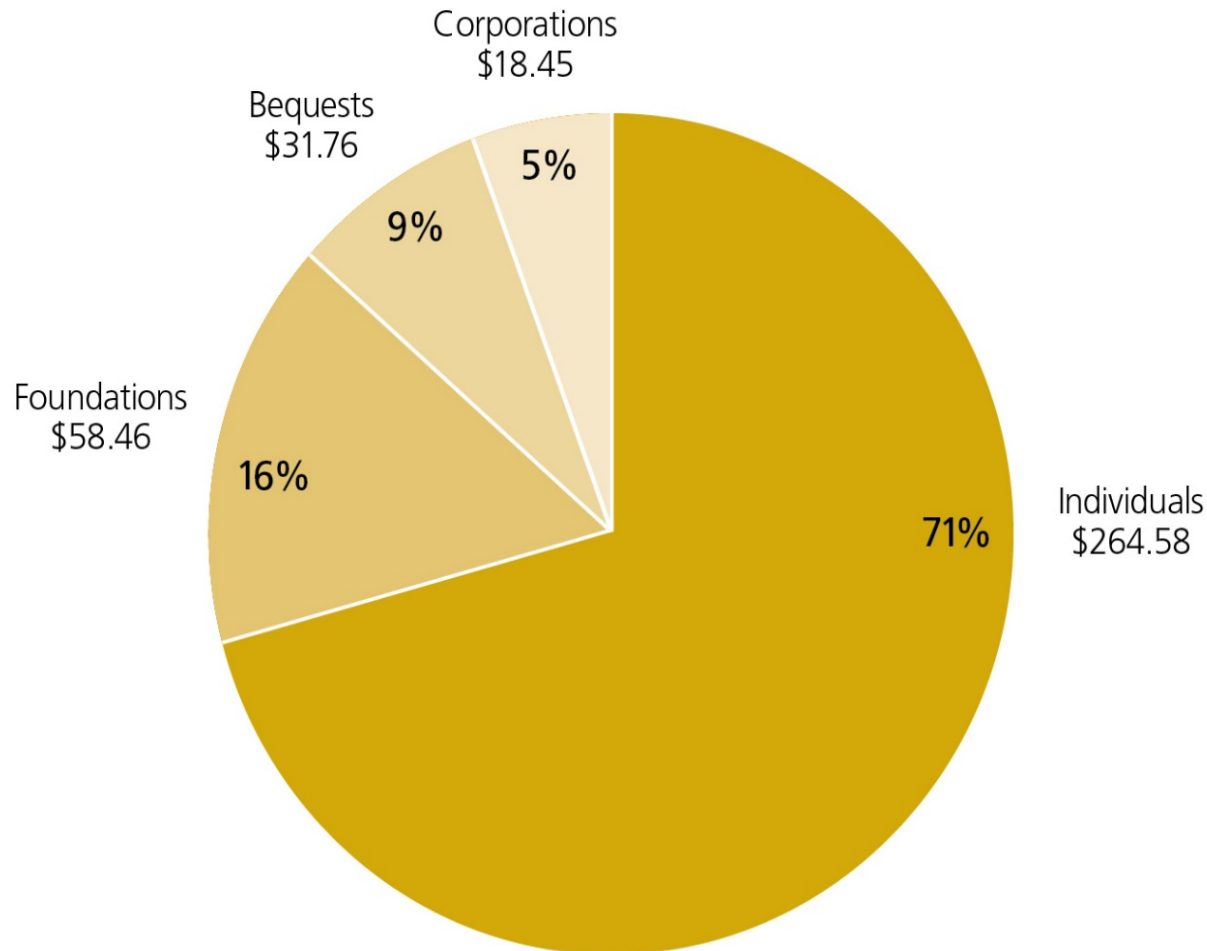
Board Responsibilities in Fundraising

- Monitor funding sources for new opportunities or potential cutbacks
- Identify and cultivate potential donors
- Be an ambassador for the organization at work, at home, in places of worship

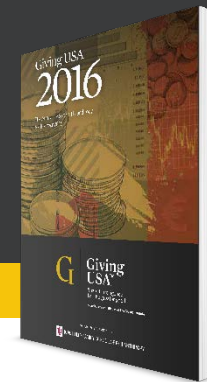
2015 contributions: \$373.25 billion by source (in billions of dollars – all figures are rounded)



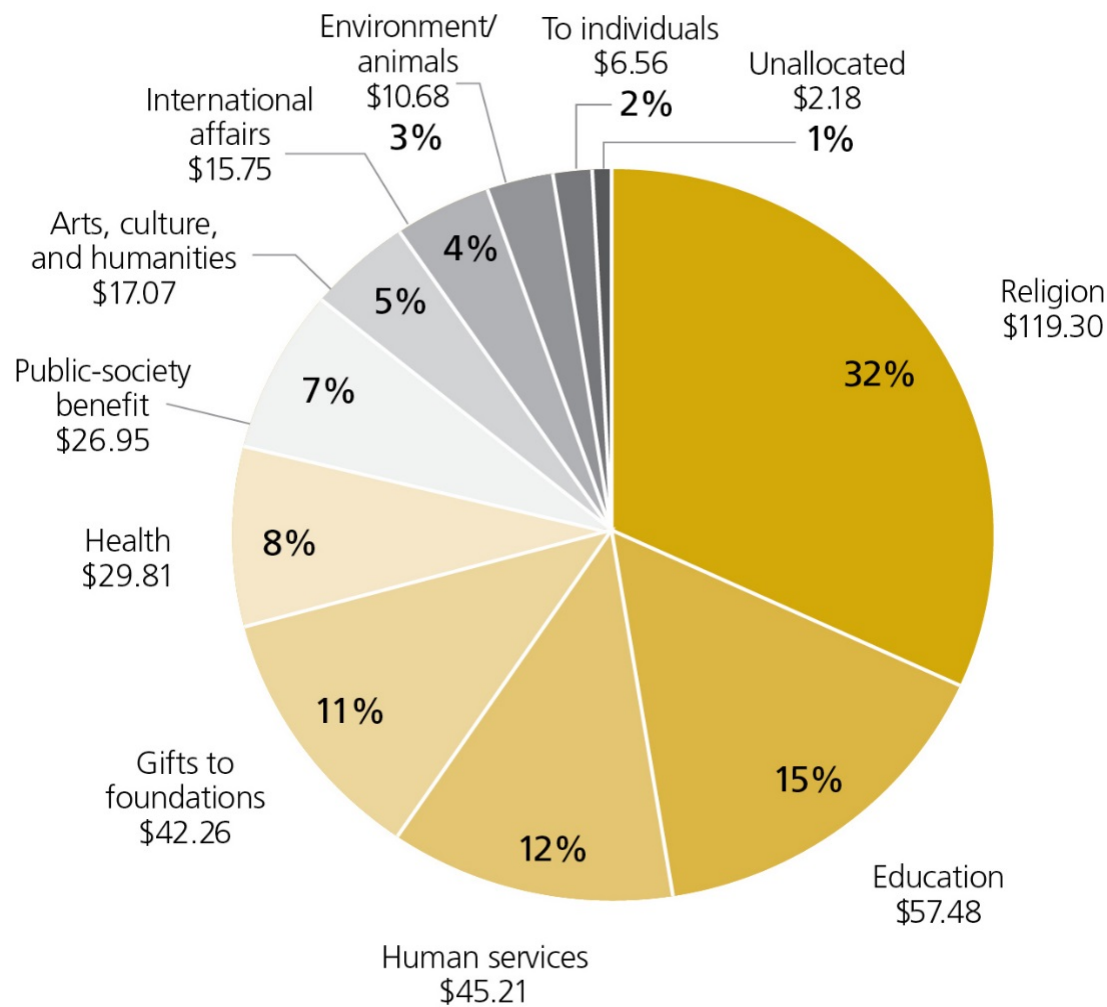
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Five Steps to Fundraising Success

1. Leadership
2. Prospects
3. Case for Support
4. Urgency
5. Communication – Internal and External

The Development Process





“4 R’s of Cultivation”

- Research
- Romance
- Request
- Recognition



Stewardship Opportunities for Board

- **Write thank you letters.** These letters should not be just automatically generated receipt letters, but handwritten letters from the beneficiaries of a project or letters that have been personally signed by a senior member of the institution.
- **Invite them to events** to hear more about your work, meet other donors and the beneficiaries of their generosity.
- **Take people to see them** and update them on the good their donation is doing.



Stewardship Opportunities for Board

- Remember and **recognize events that are special to them**, such as birthdays, promotions, weddings, religious/cultural celebrations, etc.
- **Ask them not just for their money** but their expertise, advice and time.
- **Personalize communications as much as you can**, even if it is as simple as attaching a handwritten note to a project report.
- **Let your donors hear directly from people they have helped**, so give them opportunities to interact with beneficiaries.



Motivation for Philanthropy

- The desire to express faith
- To express love for fellow man
- To perpetuate the American Dream
- To help secure or assure
- To help build and to invest



Why People Give

- Personal concern
- People give to people
- Belief in the organization's mission and program
- Confidence in leadership
- Agree with plans
- They were asked
- Tax considerations



Why People Don't Give

- Don't value mission
- Don't believe organization is stable
- Absence of powerful trustees/volunteers
- Concerns about management
- Wrong people solicited
- Inadequate cultivation or follow up
- No one asked
- No one thanked the donor for first or recent gift or pledge



Fundraising Techniques

- Direct Mail
 - ✓ Donor Acquisition
 - ✓ Donor Renewal
 - ✓ Donor Upgrades
 - ✓ Cultivation/Stewardship
- Telephone
- Special Events
- Major Donor Program
 - ✓ **Face to Face Solicitation**
- Foundations & Corporations
- Email/Web Communication/Social Networking
- Planned Giving/Marketing



Summary of Leadership

- Gifts of time are not of equal value. Loss of time is loss of individual commitment.
- Give of your desire to be an involved, concerned, caring, participatory Trustee.
- Give of your time to listen, study, evaluate the dynamic demographics in our society affecting or likely to affect the organization.



Summary of Leadership

- Give of your time to become a Trustee-in-residence to learn about the nature of the organization – its people, its staff, its programs and services, its constituents, its physical plant, its administrative functions.
- Give of your time to know your fellow Trustees.



Summary of Leadership

- Give of your advocacy for the organization on every possible occasion – for constituent recruitment, for enhancing the awareness of its distinction and for generous philanthropy.
- Give your personal resources to the fullest extent possible.



Summary of Leadership

- Give of your influence on others to join you in your concern for the essential nature of this special free-enterprise historic entity proudly and continuously.



References

- Hardy, James M., **Developing Dynamic Boards**, Tennessee: Essex Press, 1990
- Frantzreb, Arthur C. , **Not on this Board You Don't: Bonus Books, Inc., Chicago 1997**
- CASE (Council for Advancement and Support of Education)



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