

Getting the Board On Board: Strategies to Engage Trustees in Fundraising

Governance 101: Board's Role

“Stewarding the Entity Toward a Long and Prosperous Future” (NAIS Trustee Handbook)

- Fiduciary oversight
- Strategic planning in support of mission
- Risk management
- Fundraising

Board's Role Summarized:

- Governance
- Advocacy
- Fundraising

give and get



Baseline 1st Step: A Culture of Philanthropy at Your School

Make the case:

- Why is giving important?
- What is the impact?

on the school

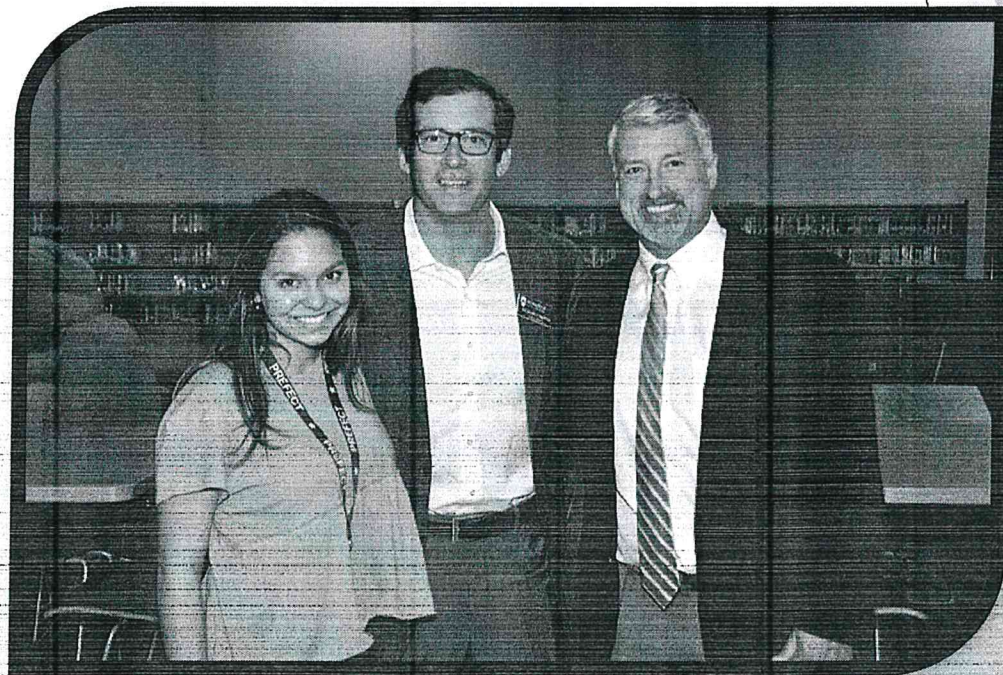
on the community



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Trustee Life Cycle

- Board Prospect
- New Trustee
- Trustee



Board Prospects - Qualities to Discern:

- Level of engagement
- Level of generosity

It's easier to engage Board members in fundraising if they have a history of philanthropy themselves



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Transparency in Recruiting

Ask:

- How strongly do you believe in the work we are doing?
- What is your appetite for fundraising?



Key:

Board Chair and Head must be on the same page as to the type of person that would make a “good” trustee.



New Trustee – The Orientation

- Review current fundraising objectives
- Discuss rationale for same; take questions
- Articulate Board responsibilities related to same



Explain Expectations (these too must be agreed upon):

- 100% leadership level commitment to the 'Annual Fund'
- Active participation in various 'campaigns'
- Ambassadorship for the cause



Trustee

- Training
- Action
- Accountability



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Real World Example: Getting the Berkeley Preparatory School Board On Board



Precursor

Head of School meets regularly with every Board member

- Build trust
- Share vision
- Inspire



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Strategies

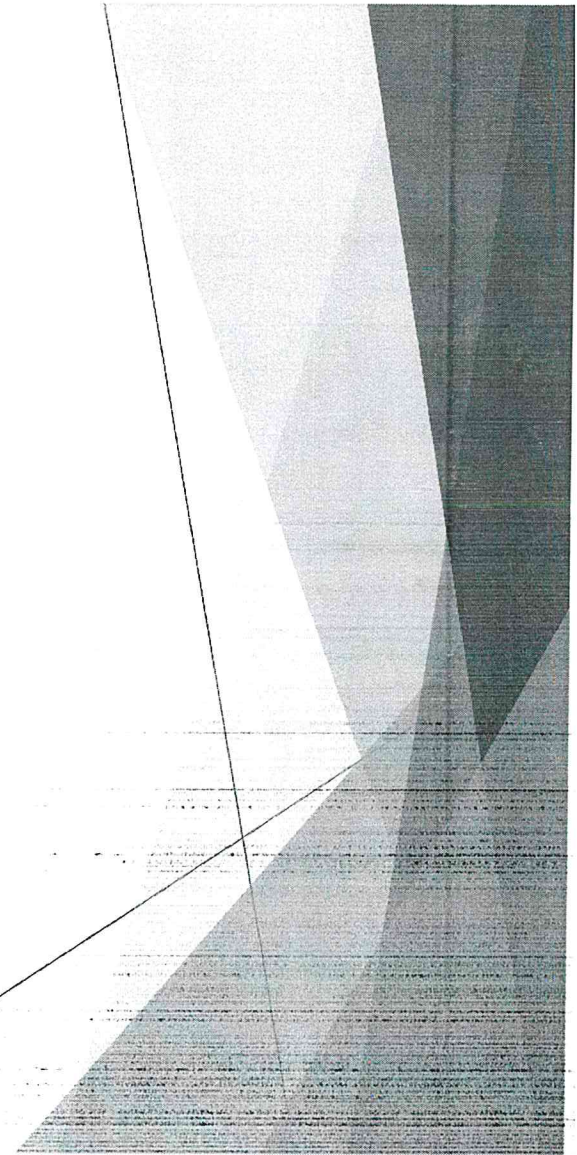


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Strategy

Board Engagement in the Annual Fund:

- Place Volunteer Leader on board
- Invite participation at kick-off “awareness” event
- 100% Board participation by time of ‘Phone-a-Thon’ (solicitation event)
- Have members make contacts at solicitation event



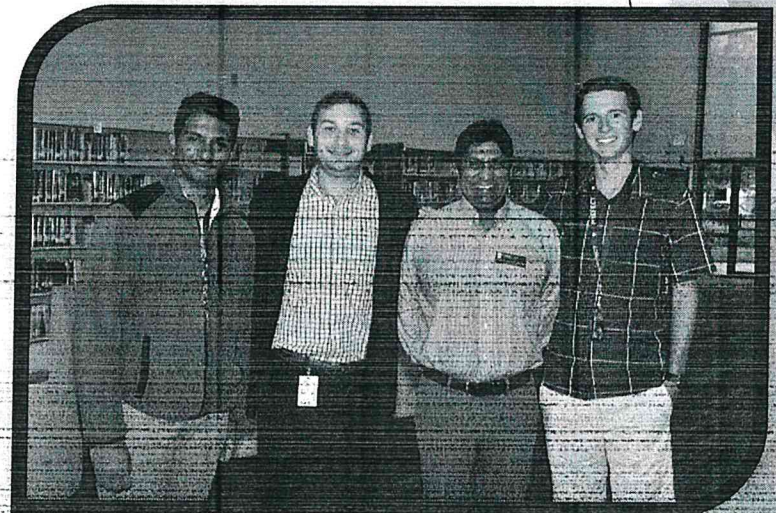
Phone-a-Thon Details:

- Make it easy on the trustee (research on families, information on how school uses the gifts)
- Celebrate secured gifts
- Serve good food, and alcohol

Strategy

Trustee Visiting Day

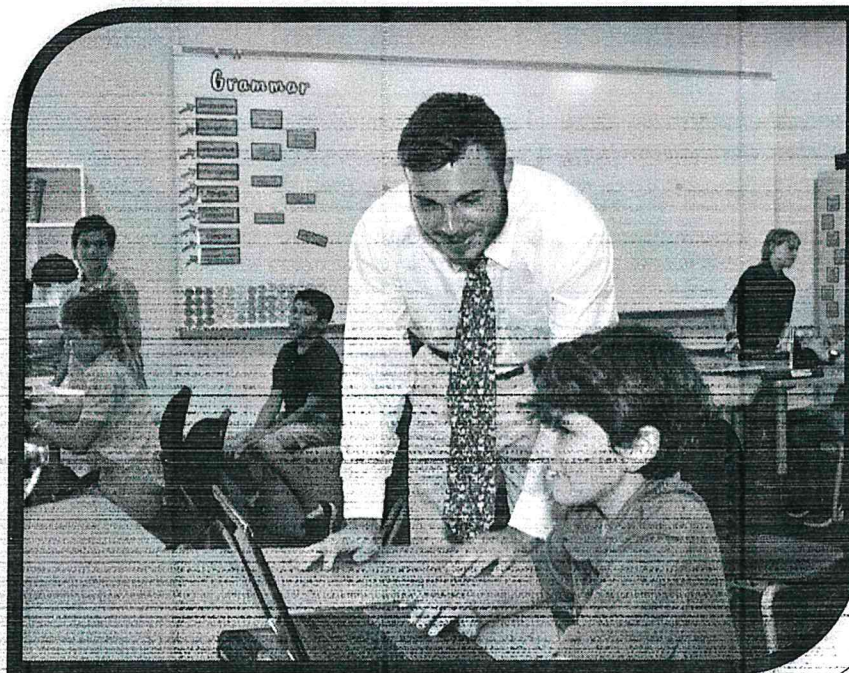
- Trustees see the school in action
- engenders confidence
- (perhaps) uncovers need



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Anecdote

Origin of the Berkeley Teaching Fellows



Strategy

Uncover and foster board-level passion for the school

Ask:

- What is your Berkeley story?
- In what contexts might you tell it?



Strategy

Build the Case for a Campaign

Generative discussion: What do we need to do to be more viable, more sustainable, BETTER, in five years than we are right now?



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The outcome of these discussions is 'The Case':
built-in commitment, ownership, and accountability



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Strategy

Uncover an area of particular comfort for each Trustee

- Raise awareness
- Host events
- Team up with Head to ask for gifts
- Ask for gifts

Strategy

Establish committees - have them function as teams

- Planned giving
- Scholarship
- Capital projects
- Programmatic support



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Imperative:

Undergird the work of Board engagement in fundraising with an expert Advancement (Development) staff, standing in partnership, and ready to support.



To Be Considered

Invest in a Consultant

Benefits:

- Board Training
- Saying things to the Board that the Head can't
- Working with Board Chair to strategize how to engage Board



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Conclusion

Getting the Board on Board?

Board should be great: governors

advocates

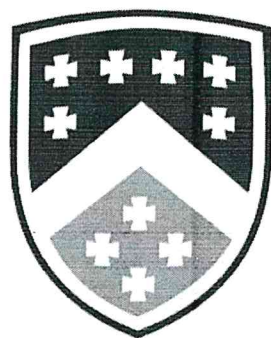
and fundraisers

Need to make it happen, intentionally and

unabashedly, in service to the future of the school



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