

Prime Your Board For Greatness

Marilyn R. Pearson

President

TPB Legacy Group

August 12, 2011

Sir Winston Churchill

“We Make a living by what we get

-We make a life by what we give”

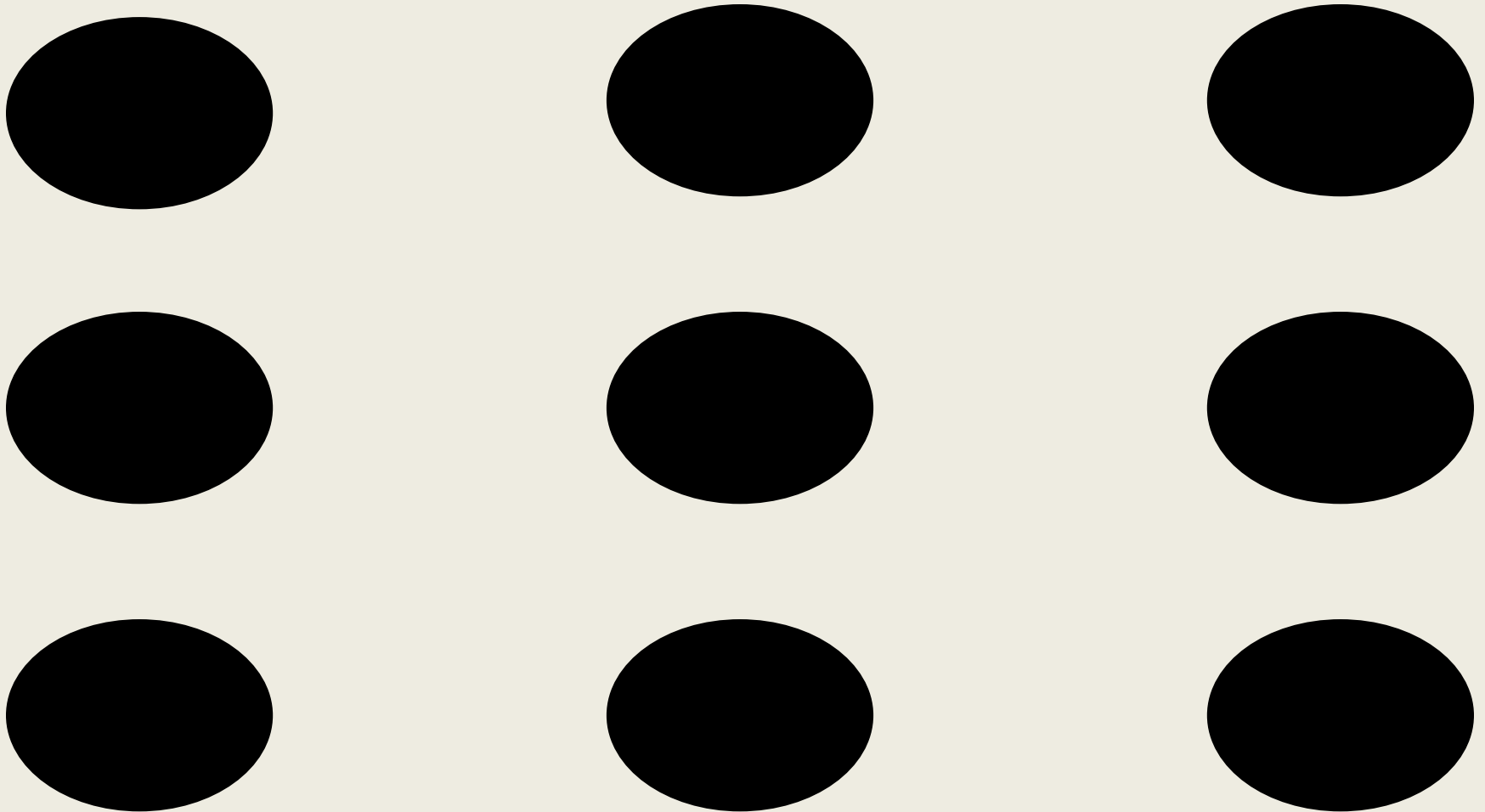
Fun With a Purpose!

- The Big Book of Business Games

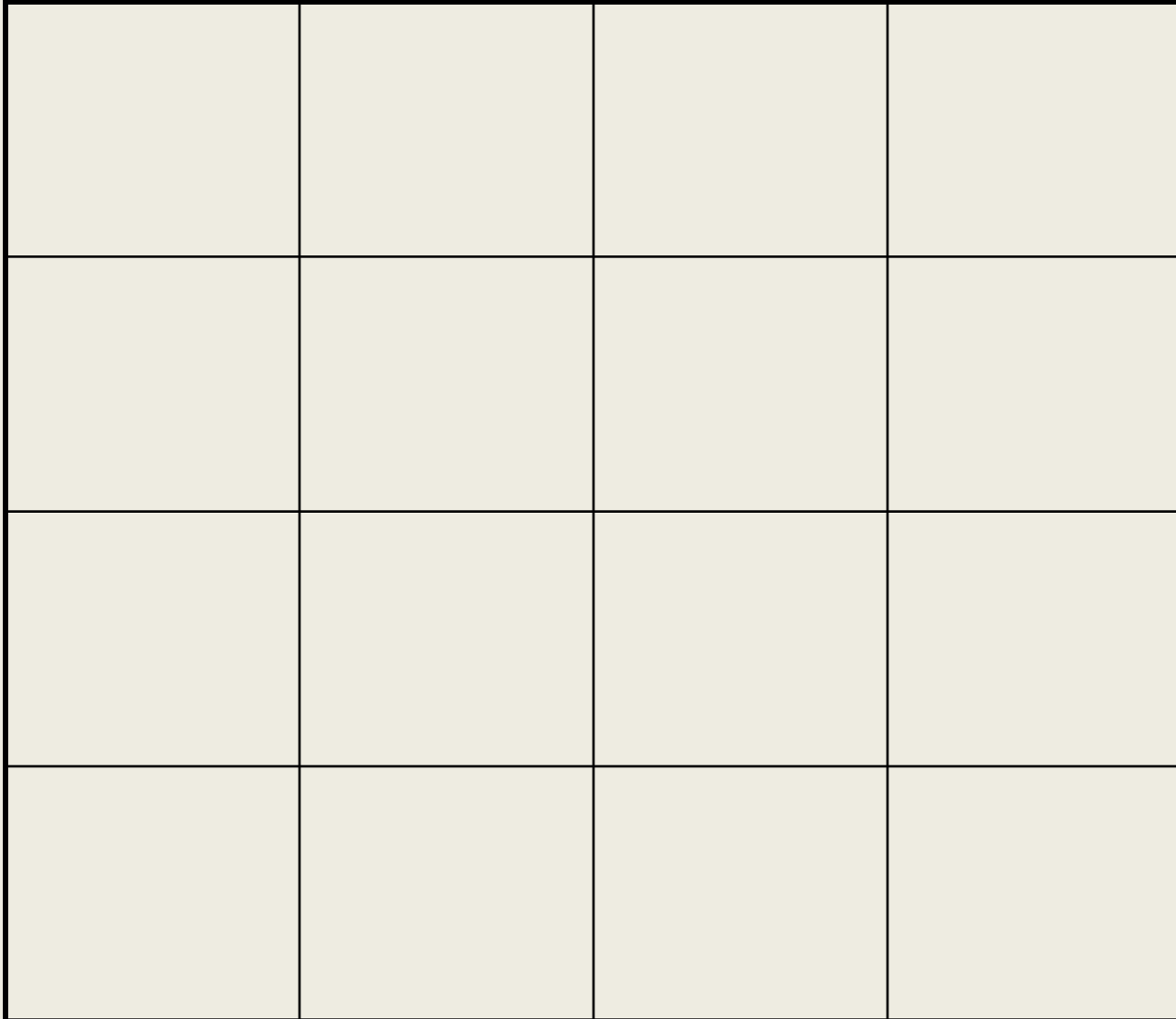
“Icebreakers, Creativity Exercises and Meeting Energizers “

By: John Newstrom & Edward Scannell

With four straight lines or less and without taking pen or pencil off the paper, connect all nine dots



How many squares?



Giving Back

Understand The Board Members Motivation

- The Board Member
 - Board Committees
- Advisory Committees
- Volunteers
- Donations

“ The ability to effect change”

Get Your Board on Board with Donor Cultivation

- Individual donors are still the biggest givers to nonprofits
 - Cultivation should happen all year long
 - Cultivation is EVERYONE'S JOB (including the Board)
 - Help the board with memory jogs for potential donors
 - Get out of the box when thinking about potential donors
 - “Who are you going to call?”

Memory Jogs for Board Members

- **Who are you going to call?**
 - Neighbors
 - Alumnae
 - Politicians
 - Business Associates
 - Professional Associates
 - Other's that I support
 - Volunteers for other nonprofits
 - My Social Network
 - My Family
- **Planned Giving or Major Gift Potential ?**
 - My Accountant
 - My Banker
 - My Doctor
 - My Dentist
 - People that I:
 - Play sports with
 - Go to the Gym with
 - Worship with
 - Work with

ASK

“To ask is no sin and to be refused is no calamity”

-Russian Proverb



ASK

What is in your “Ask “ Tool Box?

- Case for the Organization
- Capital Campaign
- Major Gift Opportunity
- Planned Giving Potential
- Annual Campaign
- Naming Opportunities

- Details on:
- What is your Mission?
- What is your vision?
- What is your elevator Speech?
 - Who you are?
 - What you do? (who do you serve)
 - WIIFM (What’s in it for me)
 - Why should people Care?

Engage your Board in Fundraising

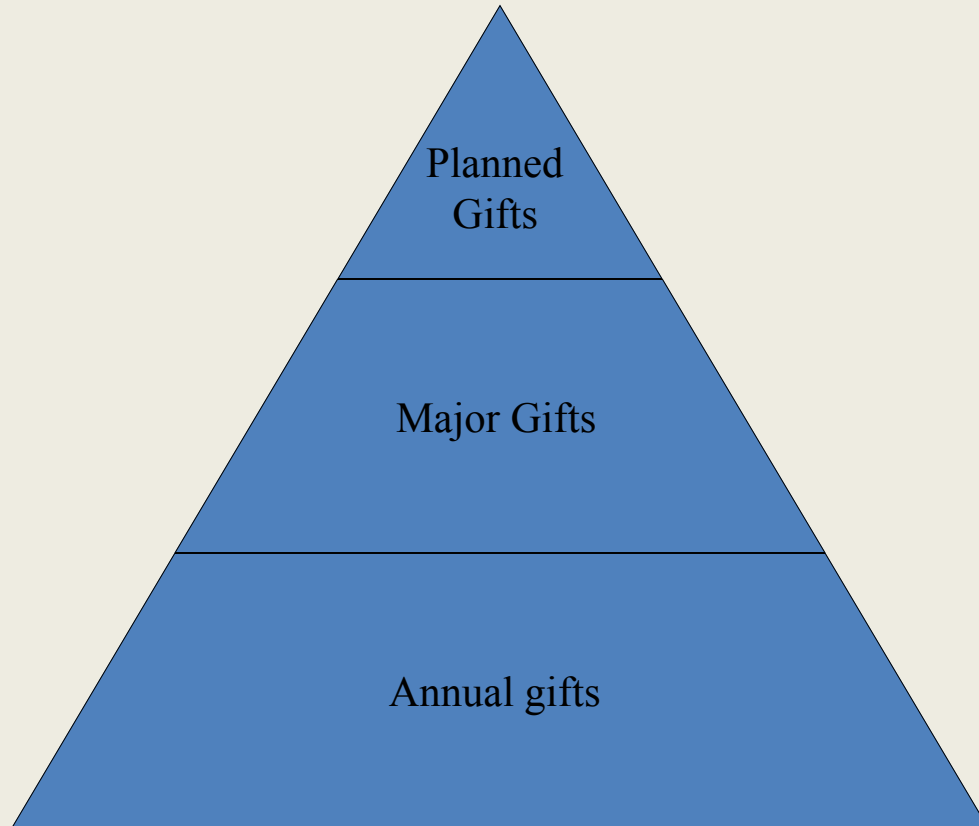
- Direct Mail
 - Direct Phone Calls
 - Web-based fundraising
 - Grants
 - Special events
 - Silent auctions
 - The “Art of the ASK”
 - Overcome Stalls and Objections
 - Signature events
- Plant the seeds that help you achieve your Fundraising Goals!



**Thank You Thank You Thank You
Thank You Thank You**

- You must say Thank You (7) times
- Ideas to be creative?

The Giving Pyramid



Educate the Board on Planned Giving

- Planned giving or gift planning

Design of charitable gifts to maximize benefits for the donor and the organization

- Giving from wealth rather than income
- The Board can help identify prospects:
 - Introductions
 - Pen a personalized letter
 - Join for a meet and greet
 - Invite and bring to an event

Board Profile

Gender	Male																		
	Female																		
Age	65+																		
	55-64																		
	45-54																		
	35-44																		
Race	Under 35																		
	African-Am.																		
	Asian																		
	Caucasian																		
	Hispanic																		
	Native Am.																		
Residence	Other																		
	Harnett																		
Profession/Skill Area																			
Accounting																			
Advertising																			
Banking																			
Board Member Recruitment																			
Budgeting																			
Bylaws																			
Community Networking																			
Community Volunteering																			
Donor Relations																			
Faith Communities																			
Financial Planning																			
Family or Patient																			

Board Profile

Insurance															
Investments															
Legal															
Marketing															
Organizational Development															
Planned Giving															
Policy Development															
Public Relations															
Public Speaking															
Special Event Planning															
Strategic Planning															
Wills & Estates															
Current Committees/Offices															
Chairperson															
Secretary															
Treasurer															
Art Management															
Corp. & Community Awareness															
Development															
Finance															
Nominating															
Planned Giving															
Strategic Planning															

“Best Practices”

For Board Members

ASK the Board

- Sign 3 Thank You letters at each board meeting
- Sign a letter to local prospects
- Help identify planned giving and major gift donors
- Attend local activities or funding presentations
- Make presentations (share the elevator speech)
- Suggest contacts for potential funding partners

ASK the Board

- Join the staff to meet potential new donors
- Join the staff to ask for gifts
- Make a personally meaningful gift to the organization
- Host a thank you event for donors
- Host a small meet and greet for prospects
- Invite donors and community leaders to an event and attend together

50 Ways To Motivate your Board

James A. Donovan

My Top Ten Picks

1. Have a plan. Write it Down. Distribute it.
2. Conduct A Board Retreat, Create your own Captive Audience.
3. Distribute The Post-Retreat Plan.

50 Ways To Motivate your Board

James A. Donovan

My Top Ten Picks

4. Compile and Publish Lists of Names and Watch What Happens.
5. Challenge your Board members to LEAD.
6. Emphasize the Values our Organization Stands for.

50 Ways To Motivate your Board

James A. Donovan

My Top Ten Picks

7. Be open to Counterpoints of View.
8. Motivate With a Video Movie Clip.
9. Plan For Fun and Make Fun the Plan.
10. Have Each Board Member Ask for a Gift.

TPB Legacy Group

***Dedicated to helping your nonprofit organization
grow stronger.***

Board development, Staff development, retreats,
workshops and fundraising assistance.

Marilyn Pearson, President

919-606-8208