



Board Chair and Board Member Best Practice Packet

Being the Board Chair or Board member of a nonprofit organization is a big responsibility, but unfortunately many committed individuals agree to act in this capacity without receiving the appropriate training and / or support they need.

In order to support all board members, whether new to the role or more seasoned in the responsibilities of the position, Nonprofit Alliance (NPA) has compiled this useful packet of basic resources and information.

Topics covered include:

- What are the Basic Responsibilities of Nonprofit Boards?
- Twelve Principles of Governance that Power Exceptional Boards
- Common Board Shortcomings
- Roles of Nonprofit Board Members and Officers
- Productive Board Meetings
- Ten Quick Ways to Improve Board Meetings
- Robust Discussions for Boards
- Checklist for the Chair
- Face-to-Face: Board Chairs & Chief Executives
- Financials Made Easy
- Key Financial and Related Questions All Boards Should Ask
- The Importance of Board Self-Assessment
- Fifty-Three Ways for Board Members to Raise \$1,000

This packet not only highlights some specific resources and tips for Board Chairs, but can also serve as a tool for the entire board to make sure all members understand the different roles and best practices of highly effective boards.

As a partner in BoardConnect Southwest Michigan, NPA also hosts regular workshops entitled “Building Your Board” and “Serving on a Nonprofit Board”. Additionally, board members and staff of NPA member organizations can request support via customized board training and development, as well as technical assistance related to research and identification of the tools and templates your board needs to govern effectively.

Please contact our office 269-565-2190 or email info@nonprofitalliance.org for more information or to find out how NPA can support your organization in building its capacity.

What are the Basic Responsibilities of Nonprofit Boards?

From www.boardsource.org

1. Determine the organization's mission and purpose. It is the board's responsibility to create and review a statement of mission and purpose that articulates the organization's goals, means, and primary constituents served.
2. Select the chief executive. Boards must reach consensus on the chief executive's responsibilities and undertake a careful search to find the most qualified individual for the position.
3. Provide proper financial oversight. The board must assist in developing the annual budget and ensuring that proper financial controls are in place.
4. Ensure adequate resources. One of the board's foremost responsibilities is to provide adequate resources for the organization to fulfill its mission.
5. Ensure legal and ethical integrity and maintain accountability. The board is ultimately responsible for ensuring adherence to legal standards and ethical norms.
6. Ensure effective organizational planning. Boards must actively participate in an overall planning process and assist in implementing and monitoring the plan's goals.
7. Recruit and orient new board members and assess board performance. All boards have a responsibility to articulate prerequisites for candidates, orient new members, and periodically and comprehensively evaluate its own performance.
8. Enhance the organization's public standing. The board should clearly articulate the organization's mission, accomplishments, and goals to the public and garner support from the community.
9. Determine, monitor, and strengthen the organization's programs and services. The board's responsibility is to determine which programs are consistent with the organization's mission and to monitor their effectiveness.
10. Support the chief executive and assess his or her performance. The board should ensure that the chief executive has the moral and professional support he or she needs to further the goals of the organization.

Twelve Principles of Governance that Power Exceptional Boards

Excerpted from "The Source: Twelve Principles of Governance That Power Exceptional Boards", BoardSource 2005. www.boardsource.org

Exceptional boards add significant value to their organizations, making a discernible difference in their advance on mission. Good governance requires the board to balance its role as an oversight body with its role as a force supporting the organization. The difference between *responsible* and *exceptional* boards lies in thoughtfulness and intentionality, action and engagement, knowledge and communication.

The following twelve principles offer Chief Executives a description of an empowered board that is a strategic asset to be leveraged. They provide board members with a vision of what is possible and a way to add lasting value to the organization they lead.

CONSTRUCTIVE PARTNERSHIP

Exceptional boards govern in constructive partnership with the chief executive, recognizing that the effectiveness of the board and chief executive are interdependent. They build this partnership through trust, candor, respect, and honest communication.

MISSION DRIVEN

Exceptional boards shape and uphold the mission, articulate a compelling vision, and ensure the congruence between decisions and core values. They treat questions of mission, vision, and core values not as exercises to be done once, but as statements of crucial importance to be drilled down and folded into deliberations.

STRATEGIC THINKING

Exceptional boards allocate time to what matters most and continuously engage in strategic thinking to hone the organization's direction. They not only align agendas and goals with strategic priorities, but also use them for assessing the chief executive, driving meeting agendas, and shaping board recruitment.

CULTURE OF INQUIRY

Exceptional boards institutionalize a culture of inquiry, mutual respect, and constructive debate that leads to sound and shared decision making. They seek more information, question assumptions, and challenge conclusions so that they may advocate for solutions based on analysis.

INDEPENDENT-MINDEDNESS

Exceptional boards are independent-minded. They apply rigorous conflict-of-interest procedures, and their board members put the interests of the organization above all else when making decisions. They do not allow their votes to be unduly influenced by loyalty to the chief executive or by seniority, position, or reputation of fellow board members, staff, or donors.

ETHOS OF TRANSPARENCY

Exceptional boards promote an ethos of transparency by ensuring that donors, stakeholders, and interested members of the public have access to appropriate and accurate information regarding finances, operations, and results. They also extend transparency internally, ensuring that every board member has equal access to relevant materials when making decisions.

COMPLIANCE WITH INTEGRITY

Exceptional boards promote strong ethical values and disciplined compliance by establishing appropriate mechanisms for active oversight. They use these mechanisms, such as independent audits, to ensure accountability and sufficient controls; to deepen their understanding of the organization; and to reduce the risk of waste, fraud, and abuse.

SUSTAINING RESOURCES

Exceptional boards link bold visions and ambitious plans to financial support, expertise, and networks of influence. Linking budgeting to strategic planning, they approve activities that can be realistically financed with existing or attainable resources, while ensuring that the organization has the infrastructure and internal capacity it needs.

RESULTS-ORIENTED

Exceptional boards are results-oriented. They measure the organization's progress towards mission and evaluate the performance of major programs and services. They gauge efficiency, effectiveness, and impact, while simultaneously assessing the quality of service delivery, integrating benchmarks against peers, and calculating return on investment.

INTENTIONAL BOARD PRACTICES

Exceptional boards purposefully structure themselves to fulfill essential governance duties and to support organizational priorities. Making governance intentional, not incidental, exceptional boards invest in structures and practices that can be thoughtfully adapted to changing circumstances.

CONTINUOUS LEARNING

Exceptional boards embrace the qualities of a continuous learning organization, evaluating their own performance and assessing the value they add to the organization. They embed learning opportunities into routine governance work and in activities outside of the boardroom.

REVITALIZATION

Exceptional boards energize themselves through planned turnover, thoughtful recruitment, and inclusiveness. They see the correlation between mission, strategy, and board composition, and they understand the importance of fresh perspectives and the risks of closed groups. They revitalize themselves through diversity of experience and through continuous recruitment.

Common Board Shortcomings

From the Boardsource Knowledge Center

What are the main weaknesses, omissions, mistakes, flaws, bad judgments, and sins that a board or an individual board member can commit? This paper lists several ways that a governing board can lose its way, along with some basic principles by which to operate.

1. Veering off the mission

Example: A youth education organization accepts a generous grant to build a sports facility for young people.

The most important decision-making guideline for a board is the mission statement. If the mission is not a central theme at every board meeting, it can be easy for a board to lose focus of the organization's true purpose.

2. Complacency

Example: A board member does not know how to analyze financial statements. Instead of asking questions, he votes with the majority.

A core obligation of every board member is active participation. Some symptoms of complacency might include board members who put off their assignments, disregard the core responsibilities that come with being a board member, fail to ask questions, or miss meetings.

3. Misguided motivations

Example: A board member recruits an out-of-work relative to run the organization.

Board members must always think of the organization first. Allowing personal preferences to affect decision making places the organization in a secondary role in a board member's mind. Misguided and unethical motivations, undeclared conflicts of interest, and the pursuit of personal benefit can endanger the organization's tax-exempt status.

4. Multiple voices

Example: A board member is interviewed by the press and advocates for her own solution to a crisis situation - one not adopted by the board.

A board only has authority as a group. Boards speak with one voice, which is formulated through deliberation. Individual board members are bound by the collective decision. Differing opinions need to be resolved in the boardroom, not declared outside to constituents, the media, or customers.

5. Micromanaging

Example: The board insists on being involved in choosing a new computer system for the organization.

One of the key duties of a board is to hire a competent chief executive to run daily operations. Part of this duty assumes that there is a valid job description and a performance evaluation process in place. A board's role is to oversee that the organization is well run; not to interfere in the domain of the chief executive.

6. Limitless terms

Example: Fearful of losing control, the founding board of an organization has been governing for 15 years.

Every board must accept and even thrive on change. New perspectives and different ideas keep a board and organization moving forward. Term limits can help boards avoid stagnation.

7. Lawless governance

Example: To get through a temporary financial crunch, the chief executive decides not to pay payroll taxes for several months. The board is unaware that this is happening.

Nonprofit tax-exempt organizations must heed federal, state, and local regulations, as well as their own bylaws. It is the board's role to make sure that all laws are respected. The board needs to assure that the organization files its Form 990 correctly and on time; that employment taxes are withheld regularly; and that official documents are saved appropriately. If a board fails to adopt appropriate policies or to effectively oversee financial regulations, it may become liable for wrong doings.

8. No self-assessment

Example: Board members' morale is low, attendance is sporadic, and the chair has no clue about how to energize the board.

By studying its own behavior, sharing impressions, and analyzing the results, a board is able to lay the groundwork for self-improvement. Failing to assess its own performance, a board is unable to define its strengths and weaknesses. As a by-product, it can also enhance its team spirit, its accountability, and its credibility with funders and other constituents.

9. Lack of self-improvement

Example: Board members have never seen individual board member job descriptions and are not familiar with their legal obligations.

Self-improvement is one of the innate consequences of self-assessment. Regular self-assessment is a futile process if it does not address apparent weaknesses in a board and result in structured self-betterment. Boards that do not provide learning possibilities for their members miss opportunities and inefficiently utilize their members' abilities.

10. Knotted purse strings

Example: A board is not able to reach consensus on its personal contribution policy. It becomes divided due to feelings of unfairness and lack of commitment.

Asking for and giving money are natural aspects of being a board member in most 501(c)(3) charities. Boards that are responsible for fundraising, yet don't have a 100 percent personal contribution rate, have failed the ultimate commitment test. If the board is not supporting the organization whole-heartedly, how can it convince others to do so?

Roles of Nonprofit Board Members and Officers

Borrowed from the Minnesota Council of Nonprofits

Individual Board Member:

- Attend all board and committee meetings and functions, such as special events.
- Be informed about the organization's mission, services, policies, and programs.
- Review agenda and supporting materials prior to board and committee meetings.
- Serve on committees or task forces and offer to take on special assignments.
- Make a personal financial contribution to the organization.
- Inform others about the organization.
- Suggest possible nominees to the board who can make significant contributions to the work of the board and the organization
- Keep up-to-date on developments in the organization's field.
- Follow conflict of interest and confidentiality policies.
- Refrain from making special requests of the staff.
- Assist the board in carrying out its fiduciary responsibilities, such as reviewing the organization's annual financial statements.

Board Chair:

The *Chair* shall convene regularly scheduled Board meetings, shall preside or arrange for other members of the executive committee to preside at each meeting in the following order: Vice-Chair, Secretary and Treasurer.

- Oversee board and executive committee meetings
- Serve as ex-officio member of all committees
- Work in partnership with the chief executive to make sure board resolutions are carried out
- Call special meetings if necessary
- Appoint all committee chairs and with the chief executive, recommend who will serve on committees
- Assist chief executive in preparing agenda for board meetings
- Assist chief executive in conducting new board member orientation
- Oversee searches for a new chief executive
- Coordinate chief executive's annual performance evaluation
- Work with the nominating committee to recruit new board members
- Act as an alternate spokesperson for the organization
- Periodically consult with board members on their roles and help them assess their performance

Vice Chair:

The *Vice-Chair* shall chair committees on special subjects as designated by the board

- Attend all board meetings
- Serve on the executive committee
- Carry out special assignments as requested by the board chair
- Understand the responsibilities of the board chair and be able to perform these duties in the chair's absence
- Participate as a vital part of the board leadership

Secretary:

The *Secretary* shall be responsible for keeping records of Board actions, including overseeing the taking of minutes at all board meetings, sending out meeting announcements, distributing copies of minutes and the agenda to each Board member, and assuring that corporate records are maintained.

- Attend all board meetings
- Serve on the executive committee
- Maintain all board records and ensure their accuracy and safety
- Review board minutes
- Assume responsibilities of the chair in the absence of the board chair, chair-elect, and vice chair
- Provide notice of meetings of the board and/or of a committee when such notice is required

Treasurer:

The *Treasurer* shall make a report at each Board meeting. Treasurer shall chair the Finance committee, assist in the preparation of the budget, help develop fundraising plans, and make financial information available to Board members and the public.

- Maintain knowledge of the organization and personal commitment to its goals and objectives
- Understand financial accounting for nonprofit organizations
- Serve as financial officer of the organization and as chairperson of the finance committee.
- Manage, with the finance committee, the board's review of and action related to the board's financial responsibilities.

Productive Board Meetings

From www.boardsource.org

Efficiency and effectiveness are key objectives of a good board meeting. Without concerted efforts, it is easy to waste time and resources, dampen members' enthusiasm and interest, and end up meeting without demonstrable results. Creating structure for meetings helps them become productive for the organization and worthwhile and interesting for the participants. Well planned meetings can help the board move closer to having efficient meeting procedures and outcomes that meet with the board's expectations. It all starts with having an agenda.

The agenda

The agenda is the recipe for the meeting. It is generally drafted by the chief executive and the chair in close collaboration. It is the tool for the chair to help guide the discussion and a reminder for members to stay focused. The agenda should tie in with the strategic plan for each meeting.

The agenda should indicate which items are for discussion and which ones are simply informative. Action items and assignments should also be identified to enforce accountability. In addition, it is helpful to separate out strategic issues, resource items, and operational matters. The most important questions should appear at the top of the agenda, and time limits set for each item so as not to let one issue monopolize the entire board meeting. Adopting a consent agenda - a compilation of items that need no discussion and can be approved with one vote - leaves more time for constructive debate.

Time for board development should also be included on the agenda, These might include reviewing board member responsibilities and legal obligations or having a tutorial on how to read financial statements. The agenda can also introduce a specific question the board needs to consider for a later communication or meeting.

Before the meeting

Without due preparation, meetings may end up as aimless get-togethers. The following tasks should be done prior to each meeting. Consider other creative ways to get board members ready.

- Assign maximum length and format to reports you expect from committees or task forces.
- At least two weeks prior to the meeting, send the agenda and attachments to all board members. Action items can be color coded. Include all written reports describing past actions (last meeting minutes, committee reports).E-mail this package if all board members are computer literate.
- Assign a contact person for questions and clarifications for consent agenda items.
- Set up a chain phone system close to the meeting date to remind everybody personally of the upcoming meeting and assignments.
- As a board member: Read the materials, come prepared to the meeting, and be ready to participate.

During the meeting

Meetings need to be managed. Board members lose interest if they are not challenged and able to utilize their special skills. Listening to repetitive reports is not a constructive way of using limited meeting time. The majority of time allotment should be spent on future issues.

The following are some ideas for energizing board meetings:

- Create a code of conduct for board meetings: No cacophony tolerated. No personal attacks allowed. Respect differing opinions.
- Change the layout of the room regularly to initiate interaction and contact between different board members. If the board is large, take advantage of small group discussions.
- Use graphic displays, pictures, or slides as much as possible to keep all participants actively engaged and focused on the same issue.
- Have themed meetings when applicable. Serious issues warrant additional time for discussion: fundraising, liability issues, outreach, or board composition.
- Bring in experts to add an outsider's point of view. Rely on staff for information when discussing programs.
- Try to avoid overly structured and procedural meetings. Allow time for constructive and free discussion and deliberation.
- Design a colorful Stop! sign for board members to use when they have a question. It can be a less intimidating way to interrupt a speaker.
- Have a resource table in the room to place additional material for board members to browse.
- Integrate evaluation of the meeting in the schedule periodically. Use index cards for questions and comments, have everyone fill out a short questionnaire before leaving the meeting room, or have a different board member observe the meeting and provide comments afterwards. Change the evaluation format regularly.

After the meeting

Without diligent follow-up, meeting decisions easily fall into oblivion. Keep board members informed between the meetings.

- Consider integrating a standard short executive session after each board meeting for review purposes and allowing the chair to make coaching comments for the future.
- Email or send by regular mail a list of assignments to each board member; copy to the chair.
- Have the chair or another contact person get in touch with board members who did not attend the meeting.
- Mail board members newsletters of what is happening between meetings, results of meeting action items, press clippings, personal news items or any other material that keeps the organization constantly in the board members' thoughts.

Ten Quick Ways to Improve Board Meetings

By Jan Masaoka, Board Café

When we think about the boards we're on, we usually think about the board meetings – which says a lot about the importance of having good meetings. Make a resolution to implement one of the following ideas each month:

- Name tags for everyone, every meeting. It's embarrassing to have seen people at several meetings and wondered what their names are . . . and later it's REALLY hard to admit you don't know their names.
- Post an acronym chart. Make a poster of frequently used external and internal acronyms (such as CDBG for Community Development Block Grants or DV for domestic violence) and post it on the wall of every meeting. (If you distribute the list on paper it is soon lost.)
- Write an "anticipated action" for each agenda item. Examples: "Finance Committee report, brief questions and answers: no action needed." "Volunteer recruitment and philosophy: Anticipated Action = form committee of 3-4 board members." "Public Policy Committee: Anticipated Action = approve organizational statement to city council on zone changes."
- Make sure that each person says at least one thing at every board meeting. This is the Chair's responsibility, but everyone should help! "Cecilia, you haven't spoken on this issue. I'm wondering what you're thinking about it?" "Matt, at the last meeting you made a good point about finances. Are there financial issues here that we aren't thinking about?"
- No one-way communication from staff. If you have a regular Executive Director's Report on the agenda, or if a staff program director is giving you a briefing, be sure that such presentations need a response from the board. If not, put them in writing in the board packet and just ask if there are any questions.
- Don't include committee reports on the agenda just to make the committees feel worthwhile. If a committee has done work but doesn't need it discussed, put the committee report in the board packet. (In the meeting be sure to recognize the committee's good work and refer people to the written report.) Instead, schedule committee reports in the context of the main discussion. For example, if there is a discussion planned on attracting and retaining staff, reports from the Finance Committee and the Personnel Committee may be appropriate.
- Note to the board president and the executive director: what are the two most important matters facing the organization - economic downturn, changes in government funding, decreased preschool enrollment due to higher unemployment, a competitor organization, demographic changes in the county? Is one of these matters on every board agenda?
- Encourage "dumb" questions, respectful dissent, authentic disagreements. Find a chance to be encouraging, at every meeting: "Sylvia, I'm glad you asked that 'dumb' question. I didn't know the answer either." "Duane, I appreciate the fact that you disagreed with me in that last discussion. Even though you didn't convince me, your comment helped make the discussion much more valuable."

- Make sure the room is comfortable! Not too hot or cold or crowded. Offer beverages and something light to eat such as cookies or fruit.
- Adjourn on time, or agree to stay later. Twenty minutes before the scheduled end of the meeting, the Chair should ask whether the group wants to stay later: “If we continue this very interesting discussion, we will have to stay fifteen extra minutes to hear the recommendation on the executive director’s salary. Can everyone stay that long, or should we end this discussion and move to that one immediately?”

BONUS IDEA: Once every year or two, survey the board about meetings. Pass out a questionnaire for anonymous return to the board vice president or secretary, asking, “What do you like best about board meetings? Least?” “Are you satisfied with the items that are usually on the agenda?” “How could the board president do more to encourage discussion at the meetings?” “Is the location or time of day difficult for you?”

Robust Discussions for Boards

From www.boardsource.org

Try these techniques to stimulate board deliberations that are highly participative and relatively spontaneous.

- *Silent Starts* - Take two minutes at the beginning of a meeting to let board members anonymously write the most important questions they feel the board and management should address. Read and talk to identify the most crucial issues.
- *One Minute Memos* - At the conclusion of each discussion item, board members take a minute to write down what they would have said if there had been more time. Collect for review by the chair and chief executive so there is no doubt about what is on the board's mind.
- *Future Perfect History* - In breakout groups, develop future-perfect narrative of how the organization moved from its present state to its envisioned state. Compare story lines, pathways and detours.
- *Counterpoints* - Randomly designate two board members to make the most powerful counterarguments to initial staff recommendations.
- *Role Plays* - Ask subsets of the board to assume the perspective of different constituent groups likely to be affected by the issue at hand. How would they frame the issue and define a successful outcome? What would each group regard as worst-case scenario?
- *Surveys* - Prior to discussing a major issue, board members take an anonymous survey that includes questions like: What should top our agenda next year? What are we overlooking? What is the most valuable step we could take to be a better board? What are the most/least attractive and worrisome aspects of the proposed strategic plan? An analysis of the responses (not the loudest voices) drives subsequent discussion.

Checklist for the Chair

By Nathan Garber

© 2003 Nathan Garber & Associates, Training & Consulting for the Nonprofit Sector

John Kenneth Galbraith wrote: "Meetings are indispensable when you don't want to do anything." Unfortunately, in many cases, he is right. To make meetings creative and useful, a good chairperson is essential. The chair can make the difference between a successful, productive, stimulating meeting and a frustrating, disappointing, waste of time. Chairing a meeting effectively does not come naturally, but it can be learned through practice and effort. Use this checklist to help you as you learn the job.

Before the Meeting

- ✓ Meetings are for making decisions. Be sure you understand what decisions have to be made at the meeting.
- ✓ Plan the agenda with the Chief Executive to ensure that the most important and most time-critical decisions are made first.
- ✓ Make sure that reports and information necessary to make the needed decisions are sent with the agenda in sufficient time for them to be read.
- ✓ Contact individuals scheduled to make a verbal report and make sure they will be present or will appoint someone else to give the report.
- ✓ Note when someone comes unprepared to the meeting. Call them in advance of the next meeting with a reminder to read and think about the agenda items before the meeting.
- ✓ The board or committee can be severely handicapped when members are absent. Frequent absences may indicate personal problems for the member or a problem with the Board. If you have reason to think that any member is not making a serious effort to attend all meetings, call them to find out why.

At the Meeting

- ✓ Use a "Consent Agenda" to dispense quickly with routine and non-controversial agenda items.
- ✓ Rules of order are important to ensure that decisions are made fairly and that the rights of the majority and minorities are protected. Make sure that the rules you follow encourage adequate discussion and participation.
- ✓ Start meetings at the scheduled time.
- ✓ Introduce and welcome all newcomers.
- ✓ Summarize the issues to be discussed.
- ✓ Clarify the time-line for discussion.
- ✓ Keep a speakers list. Make sure that everyone who wishes to speak has done so before any speaker has a second opportunity.
- ✓ Encourage the quiet ones. Direct questions to them or go around the table so that everyone can comment.
- ✓ When discussion wanders, bring it back to the matter at hand.
- ✓ Be alert to nonverbal behavior signifying dissent. Ask the dissenter to comment.
- ✓ When debate becomes confrontational and positions become entrenched, seek ways to identify the interests and values that underlie the positions and seek ways to negotiate resolution.
- ✓ Watch for signs that the debate has run its course. Then summarize the discussion and ask for a vote or expression of consensus.
- ✓ Ask the secretary to read all motions, amendments to be sure that they are clear, express the intent of the mover, and are correctly entered in the minutes.

- ✓ Before the meeting is adjourned (or before people start leaving), make sure that anyone who has been assigned a task is clear on their responsibilities and aware of the reporting date.
- ✓ Check to see if anyone has a problem with the next meeting date and time.
- ✓ End the meeting on time.

After the Meeting

- ✓ Review the previous meetings to identify problems so that they can be addressed before the next meeting.
- ✓ Review the Annual Agenda to see what is coming up in the months ahead. Update the annual agenda if necessary.
- ✓ Review this checklist. Consider what you might do to make the next meeting better, and what long-term strategies might improve your meetings.
- ✓ Consider what you might do to assist new members, deal with absenteeism, or remediate poor performance.
- ✓ If you have a vice-chairperson or if there is someone in line for the chairperson's role, include her or him in this review process.

Face-to-Face: Board Chairs & Chief Executives

Article excerpts provided by www.boardsource.org

From the Chief Executive: A Delicate Balance

By Maxine Stein

Team Leaders

The ideal relationship between a chief executive and a board chair is one of shared responsibility and partnership - similar to being co-captains of a team. Each is in charge of different aspects of the team.

As chief executive, my job is to oversee the day-to-day operations of the organization. I have to make certain that the mission is being fulfilled through our work and that the responsibilities the board has asked me to follow through on are carried out. The board's primary focus is on the mission and in helping to define the organization's present and future. The partnership, if it is a healthy one, can set an exciting tone for the organization.

A chief executive is the person most identified with the organization and its main spokesperson. I earn my livelihood from the organization. I have had both formal and informal training for my job. The work of the organization is the central force in the chief executive's life, whereas the board is more part time. Board members join the organization for very different reasons - hopefully because they are attracted to the cause. The membership of the board changes from year to year or from term to term. And the staff - one hopes - is there for a much longer period of time.

However, even though the chief executive and board chair work together, the relationship is inherently unbalanced by the fact that, ultimately, the board functions as the boss of the executive.

The bottom line is that the board is composed of the primary stakeholders in the organization. The executive has been hired to carry out the vision of the board. The best of all situations is when the executive's professional opinion and knowledge are allowed to guide the work.

Personalities and Styles

The relationship does not have to be about conflict. It should be about trust, respect, and shared vision. But a clash of personalities can happen. I do believe that no board should appoint a chair without the input of the chief executive. It is important that the nature of the relationship be honored and that personalities should be considered when placing someone into a position of partnership with the chief staff.

More often, both sides need to balance their personalities and management styles. Communication between a chief executive and a board chair is essential. It is the responsibility of both to alert the other of any problems that might arise. There should not be secrets. A board chair must encourage healthy communication and be comfortable with the rest of the board's ability to communicate with the chief executive as well. The board and the chair must also respect that communication to staff be directed through the executive.

From the Board Chair: A Working Partnership

By Mary E. Howe-Grant

The board chair and chief executive may be dedicated to the mission, but unless mechanisms are in place to handle their differences, the leadership and partnership can break down.

Inevitably, even in the best relationship, board chairs and chief executives can come into conflict. Some of the most volatile issues include:

Differences of Opinion and Focus: It's natural that two people in partnership will sometimes have differences of opinion. Add to that the fact that the chief executive must focus on how to manage the day-to-day operations while the board chair can afford to focus on the vision and the mission, and there is plenty of opportunity for disagreement and misunderstanding.

Differences in Leadership Style: Most often, the board chair and the chief executive are both experienced leaders who have already developed their respective leadership styles. A person who leads autocratically can be driven crazy by one who constantly seeks consensus. A team-oriented leader can find working with a pyramidal-style leader extremely frustrating.

Boundary/Ownership Issues: It's easy to understand how individuals who dedicate themselves to an organization can begin to take ownership of the nonprofit and its mission. Partnerships break down when one person feels the organization is more hers than anyone else's. This leads to criticism of the way the partner does her job, or interference with the partner's responsibilities.

A Working Partnership

Not all chairs are fortunate enough to find a perfect match in their chief executive, but nearly all can find a way to improve the partnership. I would recommend the following steps:

Communicate! Meet with your chief executive - and keep meeting: Communicate by e-mail frequently, meet alone twice a month for an hour, have a "No Surprises Policy", share information, celebrate successes, address potential problems, and determine action plans.

Know and do your job: You should each have job descriptions. The chief executive is the board's employee. There should have been a job description before she was hired. If expectations have changed, then the job description should also have changed. Address any ambiguities that arise between the leadership roles directly, settling them as soon as possible. If uncertain about a task, share in its execution.

Respect boundaries: The board chair of a smoothly running nonprofit does not try to manage the organization. Work with the chief executive, but don't cross any boundaries into the chief executive's defined responsibilities. The board chair can aid the chief executive in any agreed upon manner, but the key there is "agreed upon." (If the board chair believes the chief executive isn't doing her job, then that should be brought up with the board and followed through in the appropriate channels.)

Support and trust your chief executive: Mutual support and trust are essential to a true partnership. Trust that whatever the chief executive does is out of concern for the organization and in support of the mission. Support your chief executive whenever possible. And, when it isn't possible, tell her so, giving your reasons. Neither of you has the time or the energy to be divisive by second-guessing the other. So don't be tempted to do so!

Financials Made Easy

By Steven Berger

Excerpts from www.boardsource.org

Financial statements are easy to read and understand - if you know what to look for.

Board members of nonprofit organizations must set and monitor the organization's full array of goals. Like it or not, that includes getting involved in the financial results of the operation. In order for board members to effectively carry out their fiduciary responsibility, they must be able to read and understand the financial statements that will be published periodically (typically monthly) by management.

Most organizations have a finance committee that is charged with reviewing the financial statements in detail. That is appropriate. The members of the finance committee generally have a deep understanding of financial statements. They also will perform a more detailed review of the various elements of the statements and report their findings back to the full board.

All board members need to have a basic understanding of the most important elements of the financial statement. They need to know why these elements are important and what actions they should take if these elements are out of compliance with board wishes or generally accepted accounting standards.

Key Financial Statement Definitions

- *Assets* - Things that we own (cash, securities, accounts receivable, inventory, long-term fixed assets)
- *Liabilities* - Things that we owe (accounts payable, mortgages, notes payable, bonds payable)
- *Net Assets* - The difference between assets and liabilities
- *Income* - Revenues from operations or grants, gifts, and bequests
- *Expenses* - Costs incurred in the operations of the business
- *Financial Results* - The difference between income and expenses

Types of Financial Statements:

- *Statement of Financial Position (or balance sheet)* - represents the organization's assets, liabilities, and net worth (net assets) at a particular period in time (the reporting date).
- *Statement of Activities (or income statement)* - represents the financial operating results, income, and expenses over a given period of time (like monthly, year-to-date, quarterly, or annually).

Financial statements should also reflect the variances between the actual operating results and the budgeted goals that were previously approved by the board.

Every line item on the financial report is important and has meaning. Board members need to be aware of each line item and, where possible, set goals around these numbers. Without goals, management has no direction for the results of these line items.

Without a working knowledge of these line items, it is much harder for the board members to properly perform their governance role. After all, how can the board help set goals without knowing the properties of the line items for which the goals are being set?

There are a few steps that board members can take to feel more comfortable when reviewing their organization's financial statements.

1. *Time for Review:* Make sure that all board members receive financial statements at least seven days before the board meeting, so that they have ample time for review.

2. *Minimum Information Provided:* At a minimum, the financial statements should include information contained in the actual and budgeted:

- statement of financial position (or balance sheet)
- statement of activities (or income statement)
- statement of cash flows
- key volume and operational statistics
- key ratios (critical success factors – days of cash on hand, months of operating reserve, etc.)
- explanatory notes on those actual financial and statistical elements that vary from the goal

3. *Board Orientation:* As part of the board orientation process, have new board members spend two hours with the organization's chief financial officer (CFO). They should walk away with an overview of the critical elements of the financial statement, what they mean, and why they are important.

New members should spend time with the chief executive to discuss her/his view of the organization's financial results, and the goals across the various line items of the financial statements.

As an alternative, the entire board can be given a half-day educational or training session, conducted by the CFO and the chief executive, on the major financial statement elements. This will allow the board to spend some quality time in the financial statement review process.

The organization's external auditors (CPAs) could also attend the session to bring an independent view of the financial statements and add depth and breadth to the discussion.

Key Financial and Related Questions All Boards Should Ask

From www.boardsource.org

For boards to effectively fulfill their responsibility of financial and organizational oversight, the following questions should be asked on a consistent basis:

- Is the financial plan consistent with the strategic plan?
- Is the organization regularly comparing its financial activity with what it has budgeted?
- Have we run a gain or loss? (i.e. Are we better or worse off financially than we were a year ago?)
- Are our key sources of income rising or falling? If they are falling, what are we doing?
- Are any specific expense areas rising faster than their sources of income?
- Are our key expenses, especially salary and benefits, under control?
- Are the organization's expenses appropriate?
- Do we have sufficient reserves?
- Is the cash flow projected to be adequate?
- Has the board adopted a formal policy for the establishment of reserves?
- Does the organization have the appropriate checks and balances to prevent errors, fraud, and abuse?
- Does staff have the financial and other resources they need to be satisfied and productive?
- Are we, on a timely basis, filing all necessary reporting documents required at the local, state and federal level?
- Are we fulfilling all of our legal obligations?
- Is the organization meeting guidelines and requirements set by its funders?

The Importance of Board Self-Assessment

By Berit M. Lakey, Senior Consultant, BoardSource

Ensuring organizational accountability is a key role for any nonprofit board. On behalf of the public and the people or causes served, the board must ensure that organizational resources are effectively used to serve the mission. Accordingly, the board holds the staff responsible for good management and program implementation but must hold itself accountable for the quality of the organization's governance. Through periodic performance assessments a board can identify ways to strengthen its operations in service to the organization and its mission.

A number of tools are available to help nonprofit boards achieve greater clarity about their own effectiveness. Most are designed as self-assessment questionnaires which ask directors to rate the board's performance in major areas of board responsibility.

Why conduct a board self-assessment?

Board assessments serve many purposes, some internal to the board and some in relation to other constituencies. A systematic assessment process will:

- give individual board members an opportunity to reflect on their individual and corporate responsibilities,
- identify different perceptions and opinions among board members,
- point to questions that need board attention,
- serve as a springboard for board improvements,
- increase the level of board teamwork,
- provide an opportunity for clarifying mutual board and staff expectations,
- demonstrate to the staff and others that accountability is a serious organizational value, and
- provide credibility with funders and other external audiences.

A board assessment must be legitimate in the eyes of board members. The opinions of outsiders can be discounted, but what a board says about itself must be taken seriously. A self-assessment is more likely to lead to changes in the way the board operates. However, a self-assessment does not necessarily exclude input from other sources. The board may, for example, choose to ask the executive director and senior staff to provide feedback.

When to conduct a board self-assessment

A full-scale assessment may be desirable only once every two or three years, with interim assessments conducted to monitor progress on objectives set after the last assessment. Times when a self-assessment may be particularly useful include:

- at the outset of a strategic planning process
- in preparation for major expansion or capital campaign
- when there is a sense of low energy, high turnover, or uncertainty about board responsibilities
- after a financial or executive leadership crisis.

How to conduct a self-assessment

An assessment process involves a number of steps:

- Decide to conduct the assessment. This must be a board decision. Assign the responsibility for making the necessary arrangements to a small task force or to the governance committee.

- Decide whether to use a standard instrument designed for board evaluations or to design a process from scratch.
- Decide whether to use an outside consultant to administer and facilitate the process. Using an outsider to administer the questionnaire will make it more likely that board members will give frank answers. An outside facilitator of the board's follow-up discussion will encourage open and constructive debate.
- Distribute the instrument and ask board members to complete and return the questionnaire to the designated person.
- Compile, analyze, and present responses in a written report that is distributed to board members.
- Discuss the findings, perhaps in a retreat setting, and identify actions that will lead to improved performance. If an outside facilitator has been engaged, this person will already have collected additional information about the board (bylaws, meeting minutes, committee structure, etc.), and will have discussed the agenda with the person(s) charged to arrange for the assessment.

Is it worth it?

Properly conducted and followed up with action, evaluation can have a profound impact upon a board. As reported by two directors "Ultimately, the process transformed us from a traditional show-and-tell to a much more dynamic give-and-take board," said one. "It provided the impetus to move our board forward on issues that had been simmering on the back burner," another commented. "It brought our board members closer together as people . . . helping to break down barriers, establish camaraderie, and open up dialogue."

Self-assessment may be the best way to reach the root of governance problems and find lasting solutions that will make your board better.

Fifty-Three Ways for Board Members to Raise \$1,000

By Kim Klein

Grassroots Fundraising Journal

1. Give it yourself. This is the easiest way for those who are able, although if you are able to give this much money you should be helping to raise much more than \$1000.

2. List all your friends who are interested in your organization or similar organizations. Decide how much you want to ask each one for. If you are not sure of an amount, use a range. Write to them on your own stationery, include a brochure from the organization and a return envelope. Phone those people who don't respond in two weeks. Some people will need 10 friends to give \$100, and some people need 50 friends to give \$20. Most people will need a combination of gifts of \$100, \$50 and \$25.

3. Give part of the \$1000. Then ask your friends to join you in giving \$50, \$100, or whatever amount you gave. This is most effective because you are not asking them to do anything you haven't done.

4. Set up a challenge campaign. Challenge gifts can be quite small. Tell people you'll give \$5 for every \$25 they give, or will match every \$50 gift up to ten gifts. For added suspense, make this challenge during a fundraising event. You or the host can announce, "We now have the Dave Buckstretch Challenge. For the next five minutes, Dave will give \$5 for every new member that joins Worthy Cause."

5. If your organization has several grassroots fundraising strategies in place, use them all:

Sell 100 raffle tickets (@\$2)	\$200
Give \$200	\$200
Sell 10 tickets to the annual event (@ \$25)	\$250
Buy two gift memberships (@ \$25)	\$ 50
Get 12 friends to join (@ \$25)	\$300

6. Help with your organization's phone-a-thon. Bring the names of people you think would like to join and call until you have raised \$1000. Or trade names with someone in the organization and call their friends until you have reached \$1000. This is particularly effective for people who are shy about asking their own friends for money but are not afraid to ask people they don't know.

7. Acquire mailing lists for your organization. If you belong to another group, perhaps you can set up an exchange, or perhaps you have access to a list of members of some other group. You can ask all your friends to give you the names of 10 to 15 people they think would like to join. You would need to recruit about 25 members at an average gift of \$40. Depending on how "hot" your list is, you might need as few as 200 names (to do a bulk mailing) or as many as 1500-3000 (if you expect a 1-2% response). You would have to have a greater response if you wanted the mailing to pay for its costs and also generate \$1000.

8. Give the organization something they need that is worth \$1000, such as a new computer, filing cabinets, couch, software program, etc.

9. Pledge \$28 a month, and get two others to do likewise.

10. Teach a seminar on a topic you know: fundraising, knitting, organic gardening, organizing, proposal writing, environmental impact reports, gourmet cooking, dog grooming, starting your own business. Charge \$50-75 per person, with a goal of 15 to 20 people. Either absorb the cost of promotion, or have enough participants to cover it.

11. Give some or a lot of things to your organization's garage sale, making sure they are worth \$1000, and then help to sell them all.

12. Plan a spaghetti dinner at a temple, church or union hall or other big room with a large kitchen with four or five friends.

Charge \$10 per person and feed more than 100 people. You can charge extra for wine or garlic bread, or for dessert.

13. Have a fancy dinner at your home or a regular dinner at someone's fancy home. Serve unusual or gourmet food, or have special entertainment. Charge \$40 or more per person, and have 25 or more guests.

14. Get three friends to help you have a progressive dinner. Start at one person's home for cocktails and hors d'oeuvres, progress to the next person's house for soup or salad, the next person's for the main course, and the last person's for dessert. Either charge by the course or for the whole package. To make it extra special (and much more expensive), get a limousine for the evening that carries guests from house to house, or have live music at each site.

15. Host a house party. Do not charge admission and invite as many people as you can. During the party, give a short talk about your organization and ask everyone to consider a gift of \$25, \$50, \$100 or more (depending on the crowd). Either pass out envelopes and ask people to give then, or after the party contact everyone individually who came and ask for a major gift. Indicate that you have given and, if appropriate, how much you have given.

16. Get your gambling friends together. Charge a \$5 entrance fee and have a poker evening, asking that every "pot" be split with the organization. Individuals win and so does the organization. You can charge extra for refreshments, or include one or two glasses of something with the price of admission. (Watch the laws in your community on this one. In some communities it is illegal to gamble, even in your own home.)

17. Do one fundraising event every other month. This might look like:

Poker Party	\$200
Fancy dinner (8 people x \$50)	\$400
Sell 50 raffle tickets @\$2	\$100
Book sale	\$200
Recycle newspapers	\$100

18. Solicit small businesses, churches, synagogues or service clubs for \$1000. If you are active in a church or you own your own business and are involved in business organizations or service clubs, this can be very effective. You can often raise \$200-\$1000 with a simple proposal and oral presentation.

19. Take a part-time job in addition to your present work and give everything you earn up to \$1000.

20. Ask five to ten people to save all their change for three to five months. You save yours. Count it at the end of the prescribed time and use one of the other methods to raise the rest. (You may not need to.)

21. Ask two to five friends to help you put on a bake sale, book sale, or garage sale. You and your friends bake the goodies or get the books or the other stuff required for the sale, staff it and clean up afterwards. This is an excellent way to get people involved in fundraising without ever actually asking them for money.

22. For the fairly rich: Give your organization \$13,000 as an interest-free loan for a year. They invest it, earn 8%, and at the end of the year, they give your \$10,000 back.

23. Sell your organization's materials, buttons, T-shirts, bumper stickers, or whatever else they have for sale. Also, help distribute these to bookstores or novelty shops.

24. The Farming Out Method: Entice five friends to sell 100 raffle tickets at \$2 each, or invite ten friends to raise \$100 however they like. Share this list of suggestions with them. Give them a nice dinner at the successful end of their efforts (or a bottle of good wine, or a weekend away).

25. Get a famous or popular person to do a special event. Watch the costs on this, or you may lose money.

26. Invite people to your birthday party and ask that in lieu of gifts they give money to your organization.

27. Conduct a volunteer canvas. For one evening, you and a group of friends take literature to all the neighborhoods around you and ask for money at the door. Be sure to comply with city and county ordinances.

28. Lead or get someone to lead a nature walk, an architectural tour, a historic tour, a sailing trip, a rafting trip, or a horseback ride. Charge \$15-\$25 per person, or charge \$35 and provide lunch. Advertise the event in the newspaper to draw in people from outside your organization.

29. Start a pyramid dinner, or a chain dinner. Invite 12 people and charge \$12 each. Get two people of the twelve you invited to invite 12 people each at \$12, and two people from each of those two dinners to have 12 people at \$12, and so on. Here's the income:

Your dinner $\$12 \times 12$	\$144
From your dinner $\$12 \times (12 + 12)$	\$288
From those dinners $\$12 \times (12 + 12 + 12 + 12)$	\$576
From those dinners $\$12 \times (12 \times 8)$ etc.	

Twelve is used in this example because it worked very well for the Nuclear Freeze Campaign in California, which was Proposition 12. In many communities, most of the income for the campaign was generated by 12 dinners.

30. Collect cans for recycling. Ask all your friends to save their cans and bottles for you and turn them in to a buy-back recycling center.

31. Sell your frequent flyer miles to friends or donate them to the organization for a raffle. Watch the rules of the airline on this, but some airlines let you give away miles, and you may be able to sell your miles as long as you don't go through a mileage broker.

32. If you live in a nice house or own a getaway cottage in a beautiful place or an expensive city, rent it out for a week or a weekend two or three times during the year and give the proceeds to your organization. Or rent a room in your home for much less than the cost of a hotel room to people needing a place to stay while they are on business in your city. You may even make a new friend in the process.

33. Organize a service raffle. Get four people (one can be you) to donate a simple but valuable service that many people could use and sell raffle tickets for \$10-\$20 each. Keep the price a little high so you don't have to sell so many and so that the buyers have a higher chance of winning. Services can include childcare for a weekend or for any weekend night two weekends in a row; one day of housecleaning; yard work; house painting (interior or exterior), etc. Sell the tickets to neighbors, work mates and to other board members. Encourage people to buy several by offering discounts for multiple purchases, such as one for \$10, 2 for \$20, but 3 for \$25, 4 for \$35, 5 for \$40. If you are really bold or live in a more affluent area, or have few friends, sell the tickets for \$50 each. A full day of housecleaning for \$50 is a real bargain, and buyers have a high chance of winning with fewer tickets sold.

34. Offer to do something your friends and family have been nagging you to do anyway and attach a price to it. For example, quit smoking on the condition that your friends donate to your group, or get your friends to pay a certain amount for every day you don't smoke for up to 30 days. Agree to match their gifts at the end of thirty days if you didn't smoke and to give them their money back if you did. (This method could be applied to other healthy behaviors, such as exercising or not eating sugar.)

35. Find out what items your group needs and try to get them donated. This is good for people who really hate to ask for money but who don't mind asking for things that cost money. Items that one can sometimes get donated include computers, office paper and other office supplies, office furniture (second-hand from banks and corporations as they redecorate), fax machines, adding machines, food, even cars.

36. If you or someone you know owns a small business that has regular customers who receive a catalog or announcements of sales, write them an appeal letter for the organization. Your letter can say something like, "You are one of my best customers. As such, I let you know about sales coming up and good things happening in my store. Today, I want to tell you about another good thing—what I do when I am not minding the store." Then go on to describe the group and ask for a donation.

37. Similar to #36, post this letter on your Web site. Link to the organization's Web site and ask people to donate.

38. If the organization doesn't have a Web site or doesn't keep their Web site up, ask all your techie friends to donate \$100 each and hire a Web Master.

- 39. Give it yourself.** (This is so good I have to say it twice.)
- 40. Strategy with a long-deferred payoff (we hope): leave the group a bequest.**
- 41. With similar hopes as above, get friends to include the group in their wills.**
- 42. Ask friends who belong to service clubs, sororities, antique collecting groups, support groups, bridge clubs, etc. to discuss your organization in their group and pass the hat for donations.** A once-a-year sweep of even small groups can yield \$100 from each.
- 43. For the church-going: ask if your organization can be a “second collection.”** The church passes the plate for its own collection and then you or someone from your organization gives a brief talk (or sometimes the whole sermon) about your group and the plate is passed again; the proceeds go to your group.
- 44. A variation on the above is to organize a “second collection Sunday” and get as many churches as you can to take up a second collection for your organization on the same Sunday.** Someone from your group will need to be at each service and give a brief talk. Second collection Sundays can be very lucrative - the Catholic Campaign for Human Development collects as much as \$20 million on one Sunday in all the participating Catholic churches in the United States.
- 45. If, as a child, you collected something avidly that you now store in a basement, consider selling it.** Coins and stamps are particularly valuable and have usually increased in value over the years. But your collection of rocks, toy ships or rockets, arrowheads, or dolls can also be valuable. When you donate the income from the sale, you can deduct that amount from your taxes—an added bonus of this strategy, since you probably paid little or nothing for the items in the collection.
- 46. Have a sidewalk sale or garage sale for your whole neighborhood or building.** Go around to your neighbors and tell them you will take their stuff outside and sit with it all day to sell it if they will donate half or all of the proceeds to your group. Since this is stuff people want to be rid of anyway, it is a good deal for them. In one apartment building with ten units participating in donating stuff, an organization netted \$3,000 in one day. Three people from the organization helped with the selling. With a few high-ticket items, such as a washer/dryer or some nice lamps, you can make good money.
- 47. If you have an artistic bent, offer to design greeting cards to specification for organizations or individuals for a fee.** If you are good at calligraphy, sell your skills to schools for graduation announcements, friends for classy but low-cost wedding invitations, or just fun certificates such as “World’s Greatest Dad” for Father’s Day or “Outstanding Friend.” Create unique Halloween costumes or masks. Donate the proceeds from your artistry.
- 48. Create a take-off on the “adopt-a-highway” technique by naming budget items of your group as available for adoption.** You could develop a flyer that reads, “The following items have been found near death from negligence and abuse. Won’t you help? \$25 per month will ensure that our computer is maintained. \$100 per month will release our photocopy machine from toiling with no toner and a dying motor. (We can lease a new one.)”

49. An idea for people who live in border towns: Get permission to place a large container in stores or even at the airports of towns near national borders. Have a sign that asks people (in several languages) to throw in any coins or paper money they have not exchanged. Many times people leaving Canada or Mexico don't have time to exchange all their money or cannot exchange their loose change. Multiply this times hundreds of shoppers or travelers and you can make a lot of money. UNICEF does this in many European airports.

50. Hold an "I'm Not Afraid" Auction. You can do this with just a few friends or hundreds of people if you have enough items to auction. You survey a few people (and use your own common sense) about what things need to be done in their home or office that they are afraid of or would really rather not do. This is different from a service auction - there has to be an element of dread in the activity. For example, some people cannot wash their windows because their apartment is too high or the second story of their house is too high and they suffer from vertigo. If you are not afraid of heights, you can sell your window-washing service (bring a sturdy ladder). This goes for drain cleaning, minor roof repairs, antenna fixing, etc. Or, if you are unafraid of cockroaches or spiders, you can offer to clean out that dark corner or garage or basement for a small fee. Snakes can be found in gardens and woodsheds, but maybe that doesn't bother you. The problem doesn't need to be as serious as phobia. How about allergies to dust, pollen, weeds? If you don't have them, you can mow, sweep, clean for a fee. By marketing it as an "I'm Not Afraid" Auction, you also have the option for people to name something they need done to a group of volunteers, and then have a volunteer say, "I'm not afraid to do that." In that case, you will need a set fee for service.

51. Similar to the suggestion above is the "Details Auction." This is for all your friends whose desks are overflowing with papers or who can't get their receipts in order to give to the tax preparer or who complain they can never find anything. If you are a well-organized person, offer to clean up their desk, get their Rolodex in order, file their papers, etc. If you like to shop, sell that to people who don't and do their holiday shopping for them, or buy birthday, baby shower or niece/nephew presents for them. Anything that people feel they cannot control is the organized person's fundraising dream come true.

52. Find out which of your friends (perhaps this is true for you also) work in corporations with matching gift programs. Then ask them to donate and get their gift matched for your organization and ask them to ask their co-workers to donate and get their gifts matched.

53. Think of a store or service related to your organization or where a lot of your members shop. Ask the store to donate a percentage of profits for a certain day or week, or even forever. You can also explore this with mail-order firms. Then you advertise widely to friends, family and members that Joe's Florist will give 2% of each sale during Valentine's weekend to anyone identifying themselves with your group. As you can see, almost all of these strategies involve asking for money and giving money yourself. These are the basic premises of fundraising - you must ask, you must give. Everything after that involves creativity, imagination and a sense of fun.