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Wednesday, June 4, 2008



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Jobs Watch

Featured Jobs

Director of Stewardship and Development, Catholic Diocese of Pittsburgh – Pittsburgh, PA

Document Processor/Administrative Assistant, McCrory & McDowell LLC – Pittsburgh, PA

Interim Management Consultants, Interim Management Services – Dewey & Kaye – Pittsburgh, PA

[Click here to view the full list of Jobs Watch postings](#)

Save the Date

Dewey & Kaye's 10th Annual Nonprofit Symposium, **Looking Forward A Mosaic of Issues, Practices & Political Insights** will be held on **Friday, June 20th, 2008**. [Click here](#) for the invitation.

Calendar of Events

Job Search Strategies

Dewey & Kaye is pleased to offer this Career Development Center workshop for job seekers. You will learn everything you need to know about your job search, from

Unmet Expectations: Board and Executive Director Relationships

Part II

In the last issue of Mosaic we published fictional letters from a Board Chair and an Executive Director describing their challenges and perspectives on Board engagement, fundraising responsibilities and communication. The importance of clear cut expectations was described in [Part I](#) as was the 10 responsibilities of a nonprofit board.

The Board's Role in Fundraising

One of the most common conflicts we encounter when we do organizational or leadership assessments is the confusion over fundraising roles: Who is actually responsible for soliciting donations and grants? Who decides what type of fundraising strategy is appropriate? What tasks belong to the staff and what are the responsibilities of the board? Here are a few thoughts about how to engage the board in fundraising:

- **It is important that fundraising expectations be discussed, agreed upon and put in writing as the very first step in getting people to change their behaviors.** Obviously it is easier to make this expectation clear when recruiting a new board member than trying to re-negotiate with current, and especially long tenured, board members. One way to be sure that everyone on the board is clear on his or her responsibilities is to adopt a board member contract. The discussion among the board about what to put in its contract or agreement is valuable in itself. This sample may help get that discussion started.

researching job leads to accepting offers. Call to reserve your spot in this FREE upcoming workshop which will be held on Tuesday, June 10, 2008 from 12:00 – 2:00 at Dewey & Kaye. Space is limited, so please contact Linsey Marshall at lmarsall@deweykaye.com or 412-434-1335 to reserve your spot. [Click here](#) to view a schedule of upcoming workshops.

Mosaic Subscribers

Since our last issue, **35 new subscribers** have joined the Mosaic community!

<http://www.compasspoint.org/boardcafe/details.php?id=30>

- **Recruiting the right board members is very important.** Not all board members will bring with them "treasure" or access to wealthy donors. But having a certain number of these folks on your board who can help model the way for others is important. The "tipping point" for how many of these treasure hunters you will need varies from board to board and your organization's explicit fundraising strategy.
- **So when we say fundraising what do we mean?** How each organization raises funds can be very different. In fact, most organizations have several ways to raise funds or generate revenue. For example, one organization we work with does an annual appeal and holds one major event and two smaller events each year. This organization also works hard at cultivating local foundations and writing grants. They have a fee-for service model for educational events working with local schools. And they maintain a gift shop which is partially manned by volunteers. When board members are asked to help fundraise this can take the form of: personalizing annual appeal letters, writing thank you letters, opening doors to wealthy individuals, coming along on a visit to a foundation, working on an annual event, buying and selling tickets to an annual event, getting the word out to teachers and local school districts about the excellent programming, encouraging people to visit the gift shop, or even volunteering at the gift shop when appropriate. So the more choices and ways that board members have to help "support" the organization's revenue generating efforts — the more likely that board members will do so willingly and effectively.
- **But wait, what about that need for 100% of our board to write a check to the organization each year?** If your organization needs every board member to contribute a generous amount in order to keep your doors open or to grow in any meaningful way, we suggest you have bigger problems, unless you are in start-up mode. I recently spoke with a Director who insisted that this would be necessary to save the organization. "How many of your board currently contribute," I asked? "Well all of them do," she said, "but not enough." "What's enough," I asked? "I think \$1,000 each would be enough — something really significant and generous." How realistic is it to expect every board member to make a generous gift? Often

what a board member brings is time, talent and, most importantly, passion for the mission. Would you turn down a prospective board member who said to you, "I can't contribute more than \$25 a year but I'll be there for every event, and will speak passionately about the cause to anyone willing to listen; I'll attend every board meeting and bring my financial and marketing skills to the table"? It may depend on the type of organization you are, your needs, and the shared expectation and capacity of your board.

- Finally, and maybe most importantly, people can't "sell" something they don't believe in. **Board members must be engaged and passionate about what you do in order to be effective fundraisers at any level.** Board members who are not engaged, feel like they aren't adding value, or who are having bad — or even worse, boring — experiences with the organization will rarely be willing to do more than the bare minimum. The organization and the CEO need to be sure that the experience that board members have is worth their time and energy. This experience must be personally meaningful. Each individual board member must have a sense of offering something of worth to the organization. Personal attention and heightened contact with individual board members can result in a strong a vital partnership with board members who actively participate and are deeply passionate about your mission and outcomes.

The Staff's Role in Fundraising

Depending on the size of the organization the role of staff can vary. A start-up organization or one with only a 1–2 person staff will often rely on volunteers such as board members to help in many different ways. But as the organization matures and takes on development staff in addition to the CEO, boards often feel that the staff has a greater role in fundraising. This is often the point where trouble starts and role clarification is needed.

The chief executive does have a key role in fundraising and is ultimately responsible for all that goes on in the organization. Working in partnership with the board and/or the development staff, the CEO acts as the primary representative of the organization. The CEO often spends a significant amount of time on cultivating funders and maintaining good public relations. And, as described above, the CEO spends time on building and engaging the board and helping individual board members find the most appropriate way to support the organizations' fundraising

efforts.

When an organization is able to hire development staff many relationships and funding streams have been built, but there is still plenty of work to be done. The Development Director is usually the coordinator of the overall fundraising plan developed in partnership with the board. In addition to spending the majority of their time on donor cultivation, grant writing and tracking, this person must also collaborate with board members by utilizing the board's important contacts. The Development Director should also be able to help the CEO figure out the best way to engage individual board members in fundraising tasks.

So where do you start?

- Clarify your fundraising strategy and what role your board needs to play.
- Assess your Board to determine their current level of engagement with the organization. Do you have the right people on the board and what are the motivations, talents, and experience each of them brings? Does the CEO understand her/his role in fundraising? Are the expectations of all parties both realistic and in writing?
- Develop an action plan based on:
 - The obstacles that stand in the way of your board assisting with the implementation of the fundraising strategy
 - The strengths of your board that can be leveraged
 - The steps that need to be taken to leverage the board's strength and mitigate the obstacles.

Leslie Bonner, a senior consultant at Dewey & Kaye, specializes in leadership and organizational assessment and development. Contact Leslie at bonnerl@deweykaye.com.

Better Board Communication Using Board Portals

We suggest that the CEO spend individual time with each board member at least once a year to better establish a relationship. It is the communication between and before board meetings that is usually most criticized by board members and most frustrating for staff. Some board members want more detailed information, others feel they

are overwhelmed with information and don't have time to get through it. Some boards complain about how far in advance of the meeting the materials arrive. And CEOs complain that for all the time it takes to put board materials together, rarely does anyone read them in advance in the meetings. A new tool has come to our attention that could resolve this issue for both board and staff.

Board portals are designed to streamline information management, promote engagement, and increase knowledge among board members by giving them control of what and when they review materials. For the technology wary, portals are very similar to an intranet and can be part of your current website and accessed by board members using a password. Staff can post or link documents such as financials, committee notes or event information, and board members can access the website at their convenience. Those wanting more information can find it and those wanting highlights can quickly scan relevant documents. An email reminding board members of an upcoming board meeting can contain a link to the portal sight and suggestions for the key documents to be reviewed.

There are many free and low cost solutions for setting up a portal such as using [Google Docs](#) but they may take a bit more time and energy to set up.

While we do not endorse any one product we suggest that you visit the following websites for more information or to demo software:

- My Committee (<http://www.mycommittee.com/>)
- BoardEffects (<http://www.boardeffect.com/>)
- BoardWorks (<http://dsgboardworks.com/>)
- Yfactor (<http://yfactor.com/Public/Default.aspx?l=348&n=Private+Portals>)



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