

CAPLAW
Community Action Program Legal Services, Inc.

**Tapping into the Time, Talent and
Treasure of the Tripartite Board**

September 7, 2011

Presented by:
*Lisa A. Brown, Director of Development & Community Relations
Community Action, Hillsboro, Oregon*

Part of the Beyond The Basics webinar series

© 2011 Community Action Program Legal Services, Inc.

TODAY'S EXPLORATION

- ❖ Back to Basics
 - Laying the groundwork for a Board that can work for you
- ❖ Approaching Board Involvement with a Fresh Eye
 - Turning interest into action
- ❖ Achieving Meaningful and Sustainable Board Involvement
 - Ideas to spark the outcomes you need

CAPLAW © 2011 Community Action Program Legal Services, Inc. 2

CAPLAW
Community Action Program Legal Services, Inc.

**Laying the Groundwork for a
Board That Can Work for You**

© 2011 Community Action Program Legal Services, Inc.

WE ALL HAVE THEM

- ❖ The Board of Directors is a vital part of nonprofit structure and success
 - Upholding sound fiscal practices
 - Guiding policy development
 - Providing strategic direction
 - Ensuring financial viability
 - Supporting executive leadership
 - Representing the interests of the community

CAPLAW

© 2011 Community Action Program Legal Services, Inc. 4

BUT WHAT DO WE DO WITH THEM?

- ❖ Knowing what you want from your Board is the first step beyond the rubber stamp
 - Professional expertise
 - Strengthening infrastructure
 - Advocating for change
 - Increasing public awareness
 - Capitalizing on community connections
 - Raising money

CAPLAW

© 2011 Community Action Program Legal Services, Inc. 5

IS THE TRIPARTITE BOARD REALLY SO DIFFERENT?

- ❖ In function
 - No
- ❖ In composition
 - Yes
- ❖ In expectation
 - That's up to you
- ❖ In results
 - The things that make a tripartite board unique are the things that can set it apart in achieving success for your organization

CAPLAW

© 2011 Community Action Program Legal Services, Inc. 6

USE THE UNIQUE TO YOUR ADVANTAGE

- ❖ Elected Officials
 - Care about the communities they serve
 - Move within a larger spectrum of decision makers
- ❖ Low-Income Representatives
 - Bring unique perspective to your story
 - Have the capacity to create grassroots connections
- ❖ Community Representatives
 - Enhance organizational capacity with professional expertise
 - Expand your reach through their connections

CAPLAW

© 2011 Community Action Program Legal Services, Inc. 7

LET'S START AT THE VERY BEGINNING

- ❖ A successful Board of Directors begins with effective recruitment
 - Understanding the leadership needs of your organization
 - Strategically seeking individuals who have the attributes you seek
 - Making sure your mission is a good fit for their values and interests
 - Presenting a clear outline of expectations
 - Clarifying their commitment to these expectations

CAPLAW

© 2011 Community Action Program Legal Services, Inc. 8

SETTING THE STAGE FOR SUCCESS

- ❖ An effective Board Member has a clear understanding of your expectations and the role they will play in achieving your mission
 - Take the time to orient new members
 - Help them connect with the work of your agency and its impact on the community
 - Work with them to identify how they want to make a difference
 - Find and nurture their passion
 - An active Board Member is an engaged Board Member

CAPLAW

© 2011 Community Action Program Legal Services, Inc. 9

ONE SIZE DOES NOT FIT ALL

- ❖ This is where a tripartite board can be a real advantage
 - You are assured of different perspectives and unique attributes
- ❖ Understand and embrace a Board Member's strengths
 - And respect limitations
- ❖ Connect individual efforts to larger goals
 - Every contribution of time, talent or treasure matters

CAPLAW

© 2011 Community Action Program Legal Services, Inc. 10

DON'T STOP AT THE OBVIOUS

- ❖ Remember to ask how your Board Members want to help
 - Don't make assumptions
- ❖ Discover hidden talents or interests
 - Board Members bring both professional and life experience to the table
- ❖ Encourage growth
 - Never underestimate capacity

CAPLAW

© 2011 Community Action Program Legal Services, Inc. 11

IT'S NEVER TOO LATE

- ❖ Long-standing Board Members can be re-focused to bring out their strengths or re-energize their involvement
 - Take the time to help them rearticulate what inspires ongoing dedication to your organization
 - Encourage them to share past stories of success as a way to inspire new members
 - Whether formally or informally, encourage veteran Board Members to mentor new Board Members

CAPLAW

© 2011 Community Action Program Legal Services, Inc. 12

**DON'T FORGET TO CIRCLE BACK
TO WHERE YOU STARTED**

❖ Keep checking in to keep moving forward

- Are Board Members connected where they can make the most difference?
- Are they clear on your expectations and their role in meeting those expectations?
- Are they realizing success?
- Have new interests or skills emerged that shift involvement?
- Have your need or priorities changed?
- Is everyone still connected to the mission?

CAPLAW © 2011 Community Action Program Legal Services, Inc. 13

CAPLAW
Community Action Program Legal Services, Inc.

**Have you had success in building a
board that works for you?**

© 2011 Community Action Program Legal Services, Inc.

CAPLAW
Community Action Program Legal Services, Inc.

Turning Interest Into Action

© 2011 Community Action Program Legal Services, Inc.

IT MIGHT SEEM OBVIOUS TO YOU

- ❖ It's important for the Board to understand your comprehensive Resource Development plan
 - Confidence in your strategies will leverage their effective involvement
- ❖ Drill down to the areas where you can benefit most from their involvement
 - When it's clear what you need it's much easier for them to participate
- ❖ Clarify staff roles vs. Board roles
 - There are some things that professional staff are best equipped to tackle and that's okay

CAPLAW © 2011 Community Action Program Legal Services, Inc. 16

**OVERCOMING FEAR OF THE "F" WORD
(FUNDRAISING, THAT IS!)**

- ❖ Does it feel like you're approaching a firing squad when asking your Board to raise money?
 - What you are really asking them to do is create opportunities for beneficial community involvement
 - Helping people connect with your organization and asking them to make a difference is a GOOD thing
- ❖ When the topic is raised do your Board Members run for the hills?
 - A change of perspective can make all the difference

CAPLAW © 2011 Community Action Program Legal Services, Inc. 17

REFRAME THE CONVERSATION

- ❖ There are many ways your Board Members can contribute to developing resources
 - Serve as informed advocates and enthusiastic ambassadors
 - Connect communities
 - Identify opportunities
 - Create points of entry
 - Lead by example
 - Inspire involvement
 - Ask

CAPLAW © 2011 Community Action Program Legal Services, Inc. 18

GET THE HORSE IN FRONT OF THE CART

- ❖ Remember – raising money is an outcome of a process
 - Define the goal
 - Outline the steps involved
 - Assign a specific role
 - Provide support
 - Celebrate success
 - Have a follow-up plan in place

CAPLAW

© 2011 Community Action Program Legal Services, Inc. 19

THINK BIG BUT START SMALL
(Avoid the “we should” trap)

- ❖ Talking about it is easy but action takes effort
 - Too much, too fast can be overwhelming and derail your efforts before they begin
- ❖ Make sure that whatever you undertake is grounded in your mission and strategic goals
 - Just because it worked for another organization doesn't mean it's right for you
- ❖ Look for simple victories
 - Success fuels enthusiasm and drives inspiration

CAPLAW

© 2011 Community Action Program Legal Services, Inc. 20

CAPLAW
Community Action Program Legal Services, Inc.

Have you had success in turning
interest into action?

© 2011 Community Action Program Legal Services, Inc.

CAPLAW
Community Action Program Legal Services, Inc.

Achieving Meaningful and Sustainable Board Involvement

© 2011 Community Action Program Legal Services, Inc.

DON'T WAIT ON THE DUCKS AND THEIR ROW

- ❖ There will never be a perfect time to begin
 - And there will be a million reasons to keep you from starting
- ❖ Bite sized pieces are less overwhelming
 - There will always be a need to do more, but start with something you can achieve
- ❖ Make sure one plate is spinning securely before adding to the mix
 - When the time is right, you can diversify and expand the Board's involvement

CAPLAW © 2011 Community Action Program Legal Services, Inc. 23

PICK ONE BRILLIANT IDEA AND RUN WITH IT!

- ❖ If there was one thing you would like each Board Member to commit to what would it be?
 - Speak knowledgeably about the organization to their friends, families and colleagues?
 - Invite a community leader (or small group of leaders) to experience an afternoon with one of your programs?
 - Expand your communications network by sharing contacts?
 - Bring guests to a fundraising event?
 - The list could go on and on...

CAPLAW © 2011 Community Action Program Legal Services, Inc. 24

AND ON

❖ Fundraising may be priority one, but many things lead to the development of resources:

- Contact elected officials to educate them about a particular issue or initiative
- Arrange for staff to speak at a civic or community group
- Host colleagues for lunch with staff to learn more about an organization that matters to you
- Leverage Board connections to support a grant application
- You get the idea...

THERE IS NO MAGIG BULLET

❖ Maximizing Board effectiveness – no matter your goal - takes organizational commitment

- It starts at the beginning with recruitment and preparation
- A clear plan and purpose for the Board is essential
- Adequate staff leadership is vital for both structure and strategy
- Let the mission define your priorities and guide your activities

THE POSSIBILITIES ARE ENDLESS

❖ Utilizing the time, talents and treasure of your Board of Directors will yield results

- Board Members will be more invested when they are called upon to help
- Unexpected opportunities will surface as you explore ideas with each Board Member
- Success will energize your efforts and inspire more involvement
- Fully engaging your Board now will ensure their commitment to your organization for years to come

CAPLAW
Community Action Program Legal Services, Inc.

Have you had success achieving meaningful and sustainable board involvement?

© 2011 Community Action Program Legal Services, Inc.

CAPLAW
Community Action Program Legal Services, Inc.

Lessons we can learn from you?

© 2011 Community Action Program Legal Services, Inc.

CAPLAW
Community Action Program Legal Services, Inc.

Tapping into the Time, Talent and Treasure of the Tripartite Board

August 17, 2011

Presented by:
Lisa A. Brown, Director of Development & Community Relations
Community Action, Hillsboro, Oregon

Part of the Beyond The Basics webinar series

© 2011 Community Action Program Legal Services, Inc.

About your presenter Lisa Brown

Lisa Brown joined Community Action as Director of Development and Community Relations in 2007. As a professional in non-profit administration for the past 25+ years, Lisa has provided leadership in development, communications, marketing, and community relations for nonprofits in Oregon, Washington, Nebraska, Massachusetts and North Carolina. Lisa has also been engaged as a consultant by a number of emerging non-profits in the areas of board development, strategic planning and fundraising. In her current role with Community Action, Lisa serves as a member of the senior management team and is responsible for all aspects of the development and community relations program, managing a broad range of fundraising, communications, and public engagement activities.



Community Action is a nonprofit organization that works in partnership with the community to help low-income people achieve self-determination.

The Tripartite Board: CAA Standards of Excellence

- **Strategic Planning Standard 2.3 (Mobilizing New Resources)**
 - “The agency mobilizes substantial additional (non-CSBG public and other private investment) dollars for every CSBG dollar it receives to support stated strategic goals/strategies, and it regularly develops new programs, services, and partnerships in response to its community needs assessment and as identified in its strategic plan via a goal or specific strategy.”
- **Leadership Standard 1.3 (Board Structure/Function)**
 - Board Members are knowledgeable about and actively involved in reviewing agency progress, performance, and results. It meets all legal and regulatory membership requirements, understands its role, and utilizes an effective committee structure and by-laws to engage fully in all aspects of the organization’s mission, strategic direction, and assessment of its success in combating poverty and increasing self-sufficiency.
 - Systematic training for board members on topics directly related to their duties

Resources

- 53 Ways for Board Members to Raise \$1000 (originally 55 Ways for Boards Members to Raise \$500) [http:// www.grassrootsfundraising.org/howto/v15_n1_art03.pdf](http://www.grassrootsfundraising.org/howto/v15_n1_art03.pdf)
- Boards Matter: Board Building Tools for the Busy Social Justice Executive <http://managementassistance.org/tl/display/ContentDetails/432>
- Board Café – SAMPLE Board Contract <http://www.compasspoint.org/board-cafe/board-member-contract>
- GrantSpace - Your Board and Fundraising – online course (free) <http://grantspace.org/Classroom/Training-Courses/Your-Board-and-Fundraising>
- Grant Professionals Association (GPA) (fee) <http://grantprofessionals.org/>
- Association of Fundraising Professionals - Resilience Plays Remarkable Role in Fundraising Campaigns http://www.afpnet.org/files/ContentDocuments/AFPInfoExchange_Resiliency_meandv.pdf

Resources (cont.)

- Why People of Color Need to Be Good Fundraisers (MIKE ROQUE)
http://www.grassrootsfundraising.org/fmd/files/RMM_WhyPplClrNeedBeGoodFRs.pdf
+ Observations and advice apply to any low income community.
- Fundraising and Philanthropy Resources for Communities of Color
<http://www.grassrootsfundraising.org/article.php/fundraisingcoc>

Contact Information

Lisa A. Brown
Director of Development & Community Relations,
Community Action, Hillsboro, Oregon
(503) 648-6646
lbrown@caowash.org


