

Heart & Soul



Using Your Mission to Create a Dynamic Board

Your organization can't get far without its mission or its board—its heart and its soul.

You know that your mission is the heart of your organization, essential for survival. What you may overlook, however, is that your board is your organization's mind, soul, and limbs—equally crucial to health and life.

Your board is the brain trust for planning and policy. Board members provide wisdom to your organization by participating in governance, meetings, activities, and outreach. They supply the energy, leadership, and spirit to turn your mission into action. And finally, board members are your organization's arms, reaching out to others and into their own pockets to raise funds and develop resources.

Your organization can't get far without its mission or its board—its heart and its soul. While staff members can move your organization, they cannot fulfill the mission without board members who believe that their role is key to: (1) policy and planning, (2) community outreach, and (3) fundraising, fundraising, fundraising.

WHAT IS THE REAL PROBLEM?

When Paula Gavin became CEO of the YMCA of Greater New York, she realized the organization had very crucial issues to address. The Y faced difficulties in many areas—management systems, strategic planning, financial control, budget health, facility management, community positioning, and fundraising. But, as Gavin looked closely at these areas, she realized that the biggest challenge, infusing all others, was the board of directors.

The Y had a board of trustees, a board of directors, and a large executive committee. These three groups operated like three boards with a total of 70 key volunteers. The board of directors included the

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chairs of 19 New York YMCA branches. While this board appeared to have control, the real decisions were made by its executive committee. Other problems Gavin uncovered with the Y's board:

- Attendance at board meetings was far below 50%.
- "Giving and getting" to the organization averaged less than \$3,000 a year per board member.
- Expectations weren't written, nor were they clear to board members.
- The mix of individuals on the board did not reflect a desirable split of males and females, eth-

nicity, ability to raise money, or name recognition.

- Members of the board of trustees, who managed the organization's endowments and assets, were selected for their titles. They weren't included in the organization's development efforts, and their fundraising talents were thus unused.

WHAT STRENGTHS CAN WE BUILD ON?

To face these challenges, Gavin also assessed the organization's strengths:

- The organization had a strong heritage.
- The organization had a clear, powerful mission statement: "The YMCA of Greater New York is a community-based service organization dedicated to building the mind, body, and spirit of New Yorkers, and the quality of life in New York City. With values-based programs emphasizing education, health, and recreation, the YMCA services women and men of all ages, races, and religions, with a focus on youth."
- Its programs were of high quality.

(top of page 36) Youngsters from the Y's afterschool program dance at a fundraiser to benefit youth scholarships. The board is the key to effective fundraising.

(below) THE YMCA of Greater New York started with a strong slogan: "Every Kid Deserves a Y." A vital mission paired with a vibrant board make an unbeatable team.



HOW CAN WE ENERGIZE OUR BOARD?

Gavin decided the best way to address the organization's problems was to invigorate the board. To do so, she built on the organization's strengths—its powerful mission, heritage, and programs. She took the following board-building steps:

1. Define the Board's Role.

First, Gavin and her executive committee defined the board's role in light of the organization's goals, mission, and strategic plan. The board's role, they decided, would be to focus on planning, policy, fundraising, and community outreach. Board members would also advise the organization in finance, property management, human resources, communications, and public policy.

2. Fashion a Workable Board Structure.

Based on the Y's mission, the role of its board, and the board's relationship to staff, Gavin and her committee designed a new board structure. They reorganized the unwieldy structure into a single board of directors with 10 committees, 20 at-large members, and five branch representatives.



CEO Paula Gavin has built on the Y's powerful mission to invigorate the board. Important steps: Make expectations clear, and choose board members with passion for the organization's mission.

BOARD MEMBER INDIVIDUAL FUNDRAISING PLAN

Name: _____

Involvement:
Committee(s): _____
Specialty: _____

GIVE:

Annual \$ _____
Special Events \$ _____
 Dodge Dinner \$ _____
 Sports Auction \$ _____
Heritage Society _____
(Planned Giving)

GET:

Focus Area:	Target Goal
Annual	_____
Special Events	_____
Endowment	_____
Sponsorships	_____

CULTIVATION:

Examples
Cocktail Party (at your home) _____
Dinner Party (firm reception or home) _____
One-on-One Meeting w/Prospective Donor _____
Invite Prospective Donors to Event _____
Major Donor Reception _____

VISIBILITY:

PSA/Media Placement _____
Pro Bono Assistance _____
Public Relations _____
Advertising _____
Marketing _____

Goals: \$18K Give/Get; 100% Annual Support Participation, 1 Cultivation Event, Visibility Assistance

Be sure board members know that you expect them to raise funds, give personally, cultivate donors, and increase your organization's visibility. A form like this one will make expectations clear.



Paula Gavin joins Y youth members to launch a YMCA Youth Skills Certification Program. Building on the Y's high-quality programs, Gavin has created a diverse, committed board.

3. Set Expectations for Board Members.

Next, they prepared clear, written expectations and shared them with every board member. Now board members knew exactly how much skill sharing, outreach, meeting attendance, fundraising, and personal donations they were required to give.

These rules spelled out the following expectations:

- **Board Attendance.** The full board will meet six times a year. Each board committee will meet six times a year. Board members are expected to attend at least 75% of these meetings.
- **Fundraising.** Board members will develop their own individual fundraising plans based on what they feel they *can and will do* each year to raise funds, to give personally to the organization, and to cultivate new donors. Each board member will have a target amount of dollars to raise and a target number of new donors to recruit. Every board member will host one cultivation event every year. The design of this event will be specific to the board member. (See the "Individual Fundraising Plan" on page 38.)
- **Outreach.** Board members will use their connections and expertise to increase the organization's visibility. They can do so in several specific ways,

such as organizing media coverage, paying for advertising, arranging for pro bono assistance, and so on. (These tasks are also described in each board member's "Individual Fundraising Plan," as shown on page 38.)

4. Seek New Blood.

Next, members of the board's nominating committee drafted a profile of their ideal board. They aimed for as much diversity as possible, including male and female mix, ethnicity, and industry representation. They looked for people with the ability to raise funds and to give personally to the YMCA. Because of the Y's new requirements that board members attend meetings, raise funds, and reach out to the community, the nominating committee sought people willing to commit themselves.

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After the committee identified new candidates, the CEO followed the same procedure with each one:

- She met with the prospective board member and discussed the organization. During this talk, she emphasized the organization's mission, values, and programs. She also took this chance to gauge the person's passion for the organization's

mission and compatibility with the organization's values and management style.

- If there was a good match, the CEO invited the board candidate to visit a Y.
- If candidates were still interested after their visit, the CEO gave them the list of expectations. She received a commitment from them that they understood these expectations and were prepared to fulfill them.
- Before new people joined the board, the CEO asked a board member (usually a member of the nominating committee) to contact them. Thus, all new members had someone to help orient them and answer their questions.

5. *Build a Committed Board.*

Gavin did several things to deepen board members' relationships and commitment:

- She planned social events for board members.
- She connected board members to other board members through telephone calls and events.
- She tracked the results of board fundraising and outreach activities and publicized those results at every board meeting. She made sure to congratulate and honor board members for their successes and contributions.

WHAT LESSONS HAVE WE LEARNED?

Clearly, a successful nonprofit requires board members who will participate with consistency, be extraordinary fundraisers, and improve the organization's position in the community. People of stature must bring other people of stature and means into the organization's heart, sowing both short-term benefits and long-term connections.

Be sure to congratulate and honor board members for their successes and contributions.

The essential task of fundraising requires commitment to the mission, connections and a willingness to use them, and an unswerving belief in the cause. It also demands a structure which links board members' time with needed results. Fundraising has to be fun as well as easy and successful.

Since Paula Gavin took action to revitalize the board, the Y has steadily evolved. Attendance at meetings quickly reached 50% and now is up to 75%.

Every board member should have a target amount of dollars to raise.

Board members unable to meet this 75% attendance requirement dropped off the board or were asked to leave. Board diversity has improved. Board fundraising has more than tripled, soaring to an annual \$10,000 per board member. With board assistance, the organization has strengthened its strategic plan, budget, and visibility.

"This is a success story for our organization," says Gavin. "We have strong financials, we provide high-quality service, we have raised \$30 million in the last three years, and we are helping 100,000 young people live a better life—in great part due to our board of directors' talent and commitment." ■

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These publications are available through the Society for Nonprofit Organizations' Resource Center. For more information, see the *Resource Center Catalog* or contact the Society at 6314 Odana Road, Suite 1, Madison, Wisconsin 53719 (800-424-7367).

Paula Gavin is the CEO of the YMCA of Greater New York—the largest Y in the country, serving nearly 350,000 people a year. Previously, Paula was with AT&T for 22 years and combines this professional experience with continual volunteer work. She is the author of "Board Development in Nonprofit Organizations: A Perspective and Success Story," on which this article is based. Paula has enjoyed applying her business and human interests at the Y and strongly believes "Every Kid Deserves a Y." For more information, contact her at the YMCA of Greater New York, 333 Second Avenue, New York, N.Y. 10001 (phone 212-630-9694; fax 212-630-9604).

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