

A BOARD LEADS AN ORGANIZATION OUT OF THE ASHES

At New Year's the spring can seem a long way away. Recently we talked with Tom Siino, long-time board member of Big Brothers Big Sisters of the East Bay, and he was remarkably candid, as well as inspiring. His story:

"Three years ago our financial troubles started when we lost our executive director. Then we made a couple of false steps in hiring a replacement. At one point we were down in the ashes with one staff person and a lot of debt. Our budget had gone from \$700,000 to \$75,000. Now we're back to seven staff and a budget of \$400,000, all our liabilities cleaned up, cash in the bank, a great new executive director in Laura Deaton, and more and more kids in the program every day.

"When we were close to broke we made the decision NOT to hire a new ED because we didn't want any obstacles to a possible merger that we were exploring, and to save the cash. We all agreed that keeping the program staff was the most important thing, and board members took on management tasks. Sometimes we were meeting once a week! We lost a number of board members—they didn't want to come to meetings where it was always bad news being discussed and we were faced with dealing with immediate needs instead of strategic planning. We voted to have everyone's board terms end on June 30 and required each person to proactively choose to rejoin the board. A couple of times we had to loan money to the organization to make payroll.

"After several months we realized a merger wasn't going to happen. We reversed strategy: we turned our attention to hiring a new leader, and creating an organization that could attract such a leader and make him or her able to succeed. At this point instead of keeping the program staff, we let all the program staff go and kept only the fundraiser. We contracted with another nonprofit to manage our volunteer-based programs as an interim measure. We put a government grant on hold.

“All this time we were holding our bowling tournament, our big annual dinner, monitoring cash on a daily basis. Our landlord allowed us to cancel our lease and even gave us free space in the building—it was like a big closet, had no windows, and no air at first—but it was free. We talked about closing down, and set some guidelines, such as ‘If we haven’t raised X dollars by X date,’ we would consider bankruptcy. It was hard to raise money but we tried to keep focus on our optimistic view of the future. We monitored towards those guidelines and they were motivating.

“What kept me going? I was a Big Brother for a Little Brother from when he was 7 years old ‘til he was 18; today he is 31 and we still keep in touch. I was a Big Brother for another boy for two years until he moved away. I’ve seen so much of the program firsthand—such as seeing the ‘Bigs’ and ‘Littles’ together. I know what this program does. We can’t let this program go away. I’m sold for life.

“We (on the board) wouldn’t—couldn’t—go through this process again. But seeing it successful—we all have a big sense of pride in how everybody stepped up to the plate—not just on the board, but volunteers and community people and businesses. We now have five new great board members ready to take on leadership, and an executive director that is truly leading the organization to new heights and reconnecting with our community leaders and volunteers. My wife understood how important this program is to me and she never complained about all the evenings and weekends I spent doing board work—now I have more time to spend with her and our own kids again!”

Our thanks to Tom for sharing this heartbreaking and heartwarming story. It’s a reminder that boards are safety nets for nonprofit organizations: if this had been a business, it would have closed. But the board stepped up and saved the organization’s services for hundreds of young people hungry for a stable, nurturing relationship with an adult. All of us owe Tom—and the millions of board members nationwide—our thanks.

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Soliciting Corporate Giving—10 Steps to Success

Step 1: Do not make a cold call on a company without doing your homework.

Read the corporation's annual report. Familiarize yourself with their history of giving, grant guidelines, and the timeline of their fiscal year. You are in the business of youth, education, and mentoring. Make sure your program focus is compatible with the focus area of the corporation. If the company primarily supports university scholarships, your program may not be a good fit. Get a full understanding of their mission and goals, geographic focus, the type of support they normally give, and their grant range. This is public information that you can request. The annual report of the company will contain the specifics that can help you determine if they are a good fit for your "ask."

Step 2: Decide if your program is a natural fit for the company.

If your research shows the company to be a good fit, call for an appointment at least six months before the beginning of their fiscal year. You need to get in on the ground floor with their budget cycle. If you are submitting a formal proposal, do so during the first two quarters of the fiscal year. At the end of the year, there are typically few philanthropic dollars left to give out, even if the company likes your mission. Make sure you ask for an opportunity to make your presentation *in person* whenever possible. Written proposals and e-mails are too easily ignored.

Step 3: Send supplementary information about your program in advance.

This is the perfect opportunity to send a cover letter acknowledging when and where you will be meeting with the company representative. Make sure to include any articles, newsletters, awards, or testimonials about your program, which will help to familiarize the company's decisionmakers with who you are. It would be a good idea to include your current budget and anticipated income and expenses, as well as the current sources of your revenue. If the company already has employees involved in your mentoring program, make sure to brainstorm with these mentors about the best way to approach the company. Perhaps one of their mentors wants to give your contact a "heads-up" about how great you are or even join you at the meeting.

Step 4: Invite the key contact to visit your program.

While there is no guarantee that they will accept your invitation, it is a real plus if the person whom you will be visiting, or even their representative, is also able to see what your program is all about for themselves. Seeing your program in action is often much more effective than just talking about its successes. If the contact is unable to do so before your visit to their headquarters, you can always extend the invitation at your meeting.

Step 5: What you know is less important than how you communicate it.

Mentoring coordinators often spend many nervous hours preparing for the presentation to corporate representatives. No matter how well you know your subject matter, the needs of your youth, your financial status, and your measurable outcomes, if you cannot make these things understandable to other people, they will not serve any purpose. Prior to the meeting, find out how much time you have been given. Stick to that timeframe! Never go over the limit. Most likely the person you are meeting with is very busy. Even though you are excited, enthusiastic, and passionate about your program, keep your message brief.

In my mind, presentations are 50 percent visual (how you look), 40 percent oratory (how you talk and sound), and about 10 percent verbal content (what you say). That doesn't mean you don't need to know subject matter, but it does mean your presentation skills are very important.

The basic rule on the content of your "ask" is to make sure that you answer the five Ws: who (you serve), what (you do with them), where and when (your services happen), and why (the corporation needs to get involved).

Step 6: Be prepared to offer the company a return on their investment.

The company may well ask, "What's in it for us?" The person you will be meeting with may want to know how her corporation can benefit, in terms of publicity and recognition, if it decides to support your program. Perhaps you have established a "corporate honor roll" and they will be publicly honored once a year during a National Mentoring Month celebration. Maybe their name and logo will appear on all your written program materials. Whatever it is, be prepared before the meeting to state what you can give back in exchange for the company's support.

Step 7: Get to the presentation room early.

This is especially true if you know you will be meeting with a committee rather than just one person. If a group of individuals are going to make a decision about your program, get to the scheduled location ahead of time. Chances are that the participants will be filtering in slowly. This is my favorite time for what I call the "walkabout." Walk around the room, introduce yourself, meet folks, ask them about their position and interests, and if they know anything about mentoring. Typically there is always someone who was once a Big Brother, or had a formal or informal mentor in their life, or is currently volunteering as a mentor. I always find someone who fits into one of these categories. This is your chance to acknowledge them and their personal history as part of your comments during the presentation to the group. They will love being recognized and may even vote on your behalf when the decision is being made about your proposal. Let's face it: everyone loves attention and recognition. So be sure to identify individuals you meet by name in your presentation

whenever possible. This step of “working the room” is a big part of the “friend raising” philosophy.

Step 8: The method of presentation depends on the number of people who will be meeting with you.

If the meeting to discuss your proposal has been scheduled with just one person, a formal PowerPoint presentation may be overkill. Preparing handouts of a simple, concise slide presentation, which you can review with your contact throughout the meeting, may be much more helpful. Have extra hard copies available for them; they can be left behind as a reference. Whatever formats you present your information in, make sure it covers those aforementioned five Ws.

A quick word about PowerPoint: Don't ever use it, even for a larger group presentation, unless you are completely comfortable with your computer and the LCD projector. There are many problems, from computer glitches to burned-out projector bulbs, that can ruin the proceedings, leaving the audience without the information they need to make a decision, and the presenter befuddled and embarrassed. I saw this happen just recently at a meeting of a large corporation that was considering becoming involved in the local mentoring program. The PowerPoint presentation crashed, a team of tech support staff rushed to the scene, and the whole thing suffered as we sat, endlessly waiting for the equipment to be fixed.

Always have a hard copy backup, or good old-fashioned transparencies, if you do not feel completely comfortable with newer technology when you are giving your solicitation.

Step 9: The first 30 seconds and last 15 seconds are the most important ones.

The solicitation visit has four basic phases:

- *The opening*, which consists of five minutes of pleasantries and interesting tidbits
- *The involvement*, which includes any information you have acquired about the company's interests and prior support
- *The case presentation*, which permits you to be positive as you describe both the need and your project's impact
- *And the closing*, which finalizes what you are looking for by way of a commitment. If the closing ends without a commitment from the corporation, do not take it personally. Follow through with a note of thanks and try again later.

At the beginning of the meeting, you may decide to tell a story about one of your matches that is relevant to your discussion and solicitation. Make it short and sweet, so you can get

to the point of the meeting. It might be equally powerful to end with a line that relates to the opening, so that the listener will remember that initial story. If you open with a “grabber,” such as an incredibly powerful statistic, you may want to mention it again at the end of the discussion. I always like to end with my favorite quote, from Margaret Mead: “Never doubt that a small group of thoughtful, committed citizens can change the world. Indeed, it is the only thing that ever has.”

It works almost every time...

Step 10: Never leave a presentation without “next steps.”

You will want to end by asking or telling your audience where you might go from here. It is important to bring some sort of closure to the discussion. There are a number of alternative endings to the meeting. If your contact indicates that they will think about your “ask,” find out when or how you can check on their decision. If they indicate that the amount you have suggested is not within their budget, this is the time for a possible negotiation. Remind them that a moderate level of giving over a longer term can have a tremendous impact on the program, as well.

But what if, in spite of all your efforts, the proposal is rejected? While this may be disappointing, it could be for a lot of legitimate reasons. When this is the case, do not feel dejected, and do not give up. Keep the following in mind if your proposal is rejected:

- Find out what could have been improved in the proposal.
- Ask about a potential date to resubmit the proposal.
- Continue to touch base with the funder, informing the corporate contact of your program’s milestones.
- Do not give in to their potential requests to alter your focus.

You may be disappointed if your corporate “ask” did not turn out the way you hoped. Sometimes the corporation is just not interested in supporting a program’s operations. Maybe they are looking for a different kind of fit. When this is the case, remember that you should have a prepared laundry list of ways that the company may be able to assist you other than writing a check.

Good luck!

Remember that you are the face of your program. If you are going to win corporate support, it’s going to be because of the personal connections you make. So maximize your community connections and start practicing your “ask.” There’s a whole world of support in those corporate boardrooms. You just need to engage in some “friend raising.”

The Top 10 Tips for Tackling Proposals

People might think that working for an established organization like Big Brothers Big Sisters means that securing government funding is a cinch. The reality, as is often the case, is quite different. Every Big Brothers Big Sisters agency is an independent 501(c)(3) non-profit organization required to sustain itself. This means each BBBS agency is competing against other BBBS agencies, along with numerous other mentoring organizations—most offering high quality, comparable programming. When competition is so high, it's especially important to pay attention to the critical small details that will help your application survive the process and receive the highest possible score.

Think of it this way: You work for the federal government and have to do a preliminary eligibility screening of proposals before divvying them up among dozens of grant reviewers. Your desk overflows with more than 1,500 three-inch sets (one original and two copies, please, from each applicant!) of grant proposals from well-meaning, and probably deserving, programs across the country. What to do? Well, you screen out as many as possible on technicalities! Missing a form? Margins too narrow? Forgot your page numbers? The RFPs makes no bones about this: If any of the requirements are not adhered to, your proposal will not be reviewed. It's the circular file for you. The good news about this? You may end up beating out one-third of your competition simply by playing by the rules.

Whether it's national, state, or local, the following are the most critical pointers I can think of for approaching your government proposals and getting those government dollars.

1. Seek and Find

Generally speaking, anyone in a mentoring organization can be the catalyst to seeking out and securing government grants. If you're reading this chapter, you probably have the passion for the mission that is so necessary to securing services for the youth in your community.

In addition to the Web sites mentioned previously, ask yourself: "Who in our community cares about youth? Who has an interest in the results mentoring is proven to have on youth?" Once you answer those questions, you'll find a wealth of potential funders whose missions can be supported by your work with youth. Also, be sure that you are tapped into other national resources that announce government dollars, such as the NMC's MentorExchange listserv, the MENTOR/National Mentoring Partnership's e-Newsletter, and any state or local education or volunteerism message boards.

2. Carefully Read the Request for Proposal

If you've ever had to "live with" unrealistic challenges as a result of someone else's government grant, you may truly appreciate the importance of this step. Reading, word for word,

every page, every form, every footnote of the RFP has to be the single most important step you take before even thinking about researching or beginning to write your proposal. Many a time, I've downloaded an RFP that seemed just perfect only to find that on page 21, paragraph two, there's a statement that either makes the grant unrealistic or my agency ineligible. So read it. Highlight key points and develop an outline of required documents (don't trust the one they provide you— they miss things sometimes). Innocent-looking forms can hold cleverly disguised requirements that may mean extra documentation, signatures, or other items that can't be taken care of at the last minute. Plus, honestly examine the scope and purpose of the grant. If it's not for you, don't put in for it. Stay true to your mission, even when the urge to build an octopus-like empire is overwhelming. Do what you do well, and stick with it.

By the way, if the deadline on a federal grant is in three days, don't even think about it— just put it down and walk away. It's too late. I will not be responsible for your hair loss if you decide to go for it less than three weeks before the deadline!

3. Talk About It

Open a dialogue with key people who will either be helping prepare or approve the proposal. If you're working within a larger organization, find out how the proposal fits within their mission and vision and try to find a way for the funding to benefit the larger organization and your program within. Talk to everyone who has to “buy in” to the project. If you have trusted key staff members who will have to implement the project once underway, get them to help you develop the project's scope, objectives, and other key elements. Discuss budget details like compensation levels, supplies needed, gaps in current funding, and how liability issues may affect your risk management costs.

As mentioned many times in this guide, be especially careful that the grant's focus and your own are the same. Don't try to build an empire just because the money's available. When you hear about organizations having to “give back” dollars to the government, it's usually because whoever wrote the grant didn't have either the buy-in or the knowledge about how the project would actually be carried out. They knew how to write a good grant, but the organization simply wasn't adequately prepared to carry out the actual work proposed.

4. Get a Sample

This is a simple tip, but I bet many people don't bother to do it. Many funders will mention in the RFP that they have a sample available to download online or that you can request a sample of a previously successful proposal. Absolutely, positively take the time to do this. It can save you many hours in trying to decipher and second-guess what the RFP is asking you to provide. However, when reviewing the sample I would strongly caution you to avoid thinking that it represents the ideal proposal and that you should follow it as closely as pos-

sible. The sample is not about your program. Write to *your* mission. You also must be aware that in the time between when that older grant application was approved and now, the RFP has probably changed a bit. A sample will not save you the trouble of painstakingly ensuring that your proposal meets the criteria outlined in the current RFP.

5. Divide and Conquer

There are three functional areas to work on in most government proposals—the forms, the budget, and the narrative description of the services you’ll be providing. This is detail work, folks—get some help. Unless you’re truly flying solo, everyone can help with some aspect of the proposal: filling in forms, gathering data and statistics, working on the budget, figuring out how to approach the project. The more buy-in and investment you have from those who help you prepare the grant, the more success you’ll have when the project is funded. It also means that everyone on your team will have a better understanding of exactly what it means to write one of these proposals—always a good thing when people are wondering why you’re working from home and sending them e-mails at 3:00 a.m.

6. Forms First!

The forms—I can’t emphasize this enough—the forms are *not* to be left to the last minute. Of course, you would probably never dream of doing that, but I did. In the first federal proposal I put together, I left the forms for the last two days before the deadline. After all, they were just simple fill-in-the-blank things and checkboxes—how hard could they be? I was so very wrong to make that assumption. Not only did one checkbox lead me to have to research and write three additional pages on how I was planning to approach the protection of the participants, another checkbox meant I had to include an attachment—an approved motion by my board of directors stating that they supported the proposal and would accept responsibility for financial accountability. Oops. Thank heavens for my background in research and a flexible and accessible board of directors or else the many, many hours of labor I’d already poured into the 25-page narrative would have been lost.

7. Create a Realistic Budget

The budget forms can also look deceptively simple—another case of filling in the blanks. But once you read either the form or the RFP more carefully, you may find that a detailed budget narrative often must accompany that simple, one-page fill-in-the-blanks budget. This was puzzling to me at first: how do you go about writing a narrative about numbers? Well, this cycles back to Tip 3—get a sample. Call the point of contact listed on the proposal and get clarification. The level of detail required varies greatly from funder to funder. You may have to actually type out calculations for each line item or may only have to give a broad descriptor. For example, one grant I wrote required extensive detail and justification of the dollars spent on every position proposed for funding (see Sample 1), while another allowed very little detail or description (see Sample 2). In addition to the staffing budget,

EVENTS I'VE SEEN WORK!

Soup for the Soul

This winter event works with local ceramic artists to create soup bowls. Attendees buy the bowl and in return get to sample several soups, homemade breads, and desserts donated by local restaurants. Combining a silent auction with this event makes for a great evening.

Microphone Marathon

Working with your favorite local radio station, get DJs on board to sell donated items in this live auction-type approach. Talk about exposure for mentoring! Several phones are set up at the radio station to take callers' bids, and the DJ helps promote your cause between songs and advertising from sponsors. The "marathon" portion keeps the DJs working until your organization has raised its auction goals. This event is great during the holiday season when people are in the mood for shopping.

Taste of (your town's name)

Food can draw a crowd and is a relatively low-cost donation for most restaurants. Maneuvering local chefs to compete with one another offers a great incentive for restaurants and attracts media. This type of event is already very popular and it can be a low-cost effort. Sponsors abound for these types of events.

Black Tie Gala With a \$ Twist!

I went to a gala that raised \$20,000 due to a unique theme. Tickets were \$100, and only 250 tickets were available. Attendees received a great meal and live music. The gimmick? One lucky person would walk out with \$5,000 that night! The odds for winning were good, one in 250! Simply get your location, dinner, and music donated and give away a portion of your ticket sales. This event is a huge hit year after year. The hotel that donates the space and food receives an average of 200 people paying to stay in their hotel for the night.

Cardboard Derby/Wacky Craft Races

Strange as it may seem, people love to build wacky crafts out of odd materials and maneuver them over snow, water, grass, and parking lots. This event draws curious onlookers, vendor interest, and sponsors' attention, especially if you are creative with the event materials (for example, invitations made out of the same materials the cars are made out of). This event offers silly fun while bringing in the bucks.

Business Scavenger Hunts

Get local businesses to sponsor their own "team building" event by competing in an afternoon Scavenger Hunt against other local groups. You outfit the teams with digital or Polaroid cameras to take pictures of themselves with each item they need to find on their list. Businesses love to compete for the obnoxious trophy (that your program youth make!)

and crave the media attention they get while supporting your effort. Program kids and mentors can also participate!

Silent Auctions

Include creative bidding items, such as the mayor taking the highest bidder fishing, the sheriff staying one night in a cell, a famous local chef making dinner in your home, a principal doing homework with your child. Have fun with silent auction potential.

Even More Events....

- Bid on a “Dream Date” with local celebrity bachelors/bachelorettes – provides great dinners and activities to a Dating Game type of event.
- Golf Tournaments (can range from serious to silly formats)
- Dine Out for Youth Night (numerous restaurants donate a percentage of the proceeds)
- Tomato Wars (people love the stress release!)
- Music Festivals
- Jail-a-Thons
- Dive-In Movies at your local swimming pool (JAWS!)
- Casino Nights
- Chocolate Fantasia Extravanzas—Local dessert chefs, chocolate shops participate with any food that can be chocolate! Tickets are sold to chocolate lovers to come sample an extravaganza of different chocolate desserts and drinks. The event is great to hold on Valentine’s Day!
- Run/Bike/Walk/Swim Events
- Non-Events—People pay to stay home, which saves the organization the costs of running an event.
- Local Celebrity Dodge Ball, Volley Ball, Baseball, Broom Hockey
- Tail Gate-a-Thon—If your town has serious sports fans, find out if they have a “tail gate party organizer” for the sports team or facility where the sports are played. Tailgaters obtain donations for consecutive hours tailgating before the big game.
- Bowling/Karaoke-a-Thon—Ask your local bowling league if they would hold a tournament to benefit your mentoring efforts. Attach a Karaoke contest and the event is fun for everyone!

The Top 10 Responsibilities of a Social-Profit Board

1. *Determine the organization's mission, vision, strategic goals, and values*

Every organization has a purpose and usually social-profits call this the mission. It is essentially why you exist—the “condition” your work addresses. Some organizations have articulated vision statements that describe how you would like the world to look if your mission was achieved. I am going to assume that you have defined goals and objectives (essential ingredients for sustainability). And, finally, I will tell you that your organization has its own unique set of values, even if they have not been put on paper.

All these aspects of your organization, though they may begin elsewhere, are ultimately the purview of the board. They have the final say. The buck stops with them. It is their job to define these elements, refine or redefine them when necessary, and ultimately ensure that they are guiding the work of your organization.

2. *Select the chief executive (executive director)*

One of the most important responsibilities of any social-profit board is the selection of the chief executive, known in many organizations as the executive director. This person is responsible for managing the organization's day-to-day operations and serves as the primary person responsible for carrying out the board's policies and implementing its vision.

The selection of the chief executive requires careful consideration of a variety of factors and should follow a well-developed and agreed-upon selection framework. Board members must be cognizant of the organization's mission, vision, goals, and values; as well as staff morale and needs, current constituency data, programmatic considerations, financial condition, etc. The board is responsible for developing the chief executive's job description, managing a clearly defined search and selection process, and ultimately negotiating and contracting with the desired candidate.

3. *Support the chief executive and assess his or her performance*

The board's responsibilities with the chief executive only begin with that person's selection and hiring. It is incumbent upon the board, especially the board chair/president and other officers to provide ongoing support to the person in this role. The job of chief executive is not easy and it can be isolating as this person is both responsible to groups of people (the board and stakeholders) and responsible for groups of people (staff and volunteers).

The board's job is to ensure the organization's overall success and yet must, by design, turn over much of its ability to affect change to the chief executive. This requires a positive and healthful working relationship and a considerable amount of trust in both directions.

At the same time, it is also the board's job to assess the chief executive's performance and take action when that person is not meeting his or her obligations to the organization or is in violation of the organization's policies or values. These are never easy decisions, but they do represent a clear area of responsibility for a well-functioning board of directors.

4. *Ensure that effective organizational planning takes place*

When organizations talk about planning, they could mean any number of things—short-term programmatic goal setting, the creation of fundraising or financial benchmarks, the development of staff work plans or program timelines, etc.

When it comes to this aspect of the board's work, I am primarily talking about formal strategic planning, the kind of planning that usually involves hiring a consultant (which in this case I recommend), authorizing a planning committee, gathering extensive internal and external data, involving a wide variety of stakeholders, convening meetings and retreats, and ultimately developing a long-term (I recommend three-year) planning tool.

Strategic planning requires a tremendous amount of work and it involves everyone in the organization at particular points. It is the board's job to determine and manage that process.

5. *Ensure that there are adequate organizational resources*

Another of the essential elements of an effective board is its ability to contribute time, talent, and treasure—especially treasure! It is absolutely necessary for every board member to be a financial investor in your organization. Every single board member must be an investor. It sends a powerful message when they are and an even more powerful message when they are not.

Having said that, the amount of their investment is less important than the fact that they give. Don't get me wrong, their giving should be a stretch. It should not be easy. It should match their passion for the critical, life-changing work of your organization. But the most important goal here is 100 percent of them should be giving.

I've written a lot about raising money from individuals in another chapter in this book, which I encourage you to read. Your board members should also read that chapter! Ensuring adequate resources means learning to be comfortable asking people for the things your organization needs to do its work. This is the job of the board. It is the job of the chief executive. It is the job of the development staff as well as the program staff. It is everyone's job.

But it is the board's responsibility.

6. *Ensure that organizational resources are managed effectively*

Hand in hand with raising money and securing resources is paying attention to how those resources are managed. Here again, this is the job of many people, but it is the board that must assume final authority and ultimate responsibility. The fiduciary responsibilities of managing a social-profit organization are numerous. The Internal Revenue Service (IRS) affords organizations like ours certain benefits in exchange for improving the public good. They also require us to operate according to explicit guidelines and generally accepted accounting practices. Our foundation and corporate partners and our individual investors all have certain expectations and sometimes clear conditions for how their resources are used. It is likely they will expect that a formal audit be conducted and it is the board's job to solicit bids and engage an audit firm.

The board is the fiduciary authority for the organization and they are responsible collectively and even individually for the financial actions of the organization. In many states, a board member's personal assets are at risk if an organization they serve operates improperly. Being a social-profit board member has many rewards and its share of risks. It demands commitment, understanding, engagement, and passion. Every board member must be up for the challenge.

7. *Monitor programs in relation to mission, vision, strategic goals, and values*

Although I am not a big fan of board involvement in programmatic issues, it is important that the board ensure that the organization does not stray far from its articulated priorities. Opportunities always present themselves and staff are always working to do more, often with less. Funding opportunities or shifting donor priorities, for example, can cause organizations to stretch and twist to meet budget targets. Sometimes it is necessary. Sometimes it causes organizations to lose focus.

The board should know about the organization's programs, where it is soliciting funds, and how the work aligns with the board's priorities. I recommend that the board require the chief executive to provide this information as part of his or her formal reporting process; and that the board exercise due diligence in reviewing the program's initiatives whenever possible.

8. *Enhance the organization's public standing*

It is always important for social-profit organizations to carefully manage their public image. Our ability to build interest in our work is often tied to how well known we are in our communities. Board members can and must play a central role in introducing the organization to their friends, family, colleagues, and associates. They must act as ambassadors, even missionaries, for your great work whenever and wherever they can.

They will need information about your programs and access to your best thinking about how to characterize your work. It will be helpful to offer them training in how to speak about the impact of your efforts and it will be important to send them frequent updates.

Board members should assess the opportunities they have in their life to make their involvement and commitment to your organization known. In the chapter earlier in this book on individual donors, I offer a mapping tool that could be helpful for this process. Another approach would be to ask your board members to set up meetings between their contacts and key staff, clients, or volunteers. Perhaps they can represent your organization at meetings, conferences, or community events. This is their chance to share their passion for your work with the people in their lives.

9. *Maintain accountability and ensure legal and ethical integrity*

As the board is the fiduciary authority when it comes to finances, so too is it the organization's legal authority, contract agent, and responsible party. It is the board's job to ensure that the organization operates in accordance with local, state, and federal laws at all times. It should establish appropriate monitoring policies and retain competent legal representation when necessary.

The board's policies should be developed with attention to legal and ethical issues and it should pay close attention to legal developments in the social-profit sector. Social-profit organizations should also pay extra attention to their risk management practices, seeking assistance from experts when appropriate. It is the role of the board to get the information it needs from staff or other sources to protect the organization, its reputation, and its assets.

Finally, boards are responsible for making sure that the organization makes ethical decisions that are consistent with its mission, vision, and values. For example, I've written another chapter in this publication that looks at ethical considerations related to your fundraising practices. Another area of concern would focus on personnel policies and staff and volunteer management. There are others and they are all the responsibility of your board.

10. *Recruit and orient new members and assess overall board performance*

If a board does not assess its own performance, who is going to do it? The chief executive reports to the board and other staff report to the chief executive. It doesn't seem like good process for them to do it. Stakeholders could play a role, but they probably don't have all the information they would need. Evaluation of the board's performance by funders, donors, supporters, or members seems potentially awkward.