



BWF Client Partner Series

Dennis Prescott and Jan Cady



- Welcome! We are glad you have joined us.
- Use the Q&A Feature to ask questions.
- Any unanswered questions will be addressed individually after the webinar.
- Share your thoughts with us by using **#bwfwebinar**.
- For technical challenges, support is available by emailing bwf@bwf.com.

Upcoming Webinars



All webinars are at 2pm EST/1pm CST.

- Monday, March 30: ***Sustaining Optimal Board Leadership in Times of Crisis***, hosted by Dennis Prescott and Jan Cady.
- Wednesday, April 1: ***Reviewing Philanthropic Priorities and Alignment with the Current Marketplace***, hosted by Mark Marshall and Josh Birkholz.
- Thursday, April 2: ***Understanding Your Engagement Index: Priming Your Organization for Current and Future State***, hosted by Alex Oftelie.



Sustaining Optimal Board Leadership in Times of Crisis

March 30, 2020

Introduction

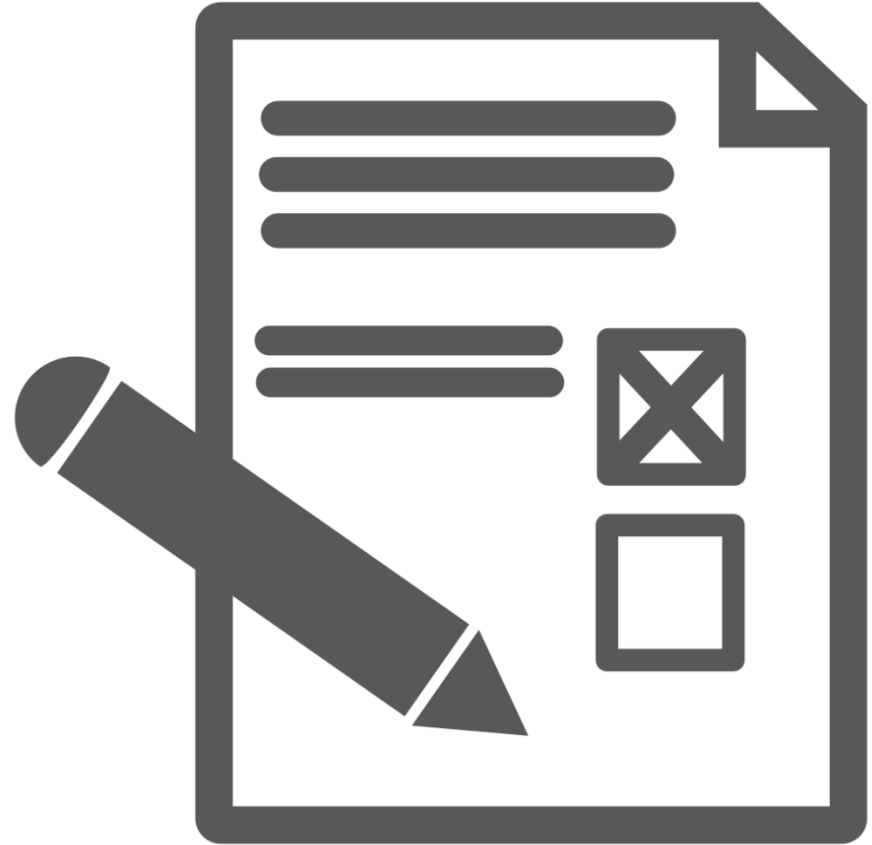
- Why this is so important.
 - CARE
 - COURAGE
 - COMPASSION
 - CONTINUITY
- Your organization is more relevant than ever.
- How many boards do you have? Development or Campaign committees?—Need plans for each.

Key Lessons Learned from Previous Events

- **Consistency.** Organizations that have stayed focused on philanthropy have seen the biggest returns on investment.
- **Take the long view.** The economy regains its momentum over a period of time, sometimes surprisingly quickly, others in unexpected ways.
- **Generosity.** Donors step into the gap to fill critical need of the philanthropic organizations that are important to them.
- **Mission.** The world needs its great organizations more during these periods.

What You'll Need

- Case for the times.
- Talking points, one-pagers, all pointed at what your organization is doing to help.
- Specific plans for each board if you have multiple groups.



Case for the Times

- Are you providing direct services you can write about?
- Do you have expert advice that can be offered from your staff?
- What else should board members know?
- Prepare FAQ for board use.



Board Outreach—Individual and Group

- Weekly insider updates from CEO, medical staff, faculty, etc.—Keep them interesting and varied.
- Individual calls, emails, texts. Be sure each board member has one assigned relationship manager (probably already in your system, but more important than ever in these times.)
- Prepare talking points for frontline staff to use in individual outreach to keep consistency.

For Individual Calls

- First questions are about THEM...
 - "How are you doing?"
 - "Any loved ones affected?"
 - "What are you doing personally to take care?"
- Then move to the organizational response.
 - "Have you been reading our updates?"
 - "Do you have any questions or need to speak with anyone?"
- Hoping you can help, as a fabulous board member and community leader—then give specific suggestions, make assignments, offer information to support.



What Board Members can do Externally

- ☑ In collaboration with gift officers, reach out to major donors.
- ☑ Check on other VIPs on behalf of the organization.
- ☑ Let community leaders know what your organization is doing to help during this crisis.
- ☑ Stay informed via insider communications and be ready to advocate if asked.
- ☑ Make a gift to help with crisis response.

What Board Members can do Internally

- ☑ Help you sustain and grow when organizational leadership may be asking for unreasonable cost cuts due to recession threats.
- ☑ Help you stay positioned for long-term success by not cutting any resources that will impede revenue production now or in the future.
- ☑ Bolster staff morale by being in touch, sharing motivational ideas, showing they care even more when challenged.
- ☑ Where appropriate (and ethical), advise fundraising staff on individuals or sectors that continue to make money in these times.

Board Challenge

- If your organization is really doing relevant things to help...
 - Ask board members to give to a Response Fund to match other gifts to the fund.
 - Try to raise \$100,000 or more to give it punch.
 - Use the challenge gift to reach out to other donors—from online to lead annual calls.
 - Use challenge to motivate gift officers to get on the phone and stretch.



Discussion

Thank you!

Dennis Prescott and Jan Cady

Additional Resources Found At:

[Bwf.com/CurrentResources](https://bwf.com/CurrentResources)



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