

Fact sheet: The Board's Role in Securing Philanthropic Support

As with business partnerships, the board can help in a number of ways with securing donations, whether through corporate philanthropy, Foundation grants, or individual donations.

In the case of corporate philanthropy and Foundation grants, the nature of the board's possible involvement will be very similar to that outlined for business partnerships, except that the Business Case will become the philanthropic case, and that meetings and negotiations are relatively unusual - most philanthropic organisations seek a written proposal as the starting point.

In the process of securing individual donations, the board's role may include:

Philanthropy or Donations Strategy	Role of the Board
Build the organisation's donor case	Contribute to and critique the case
Identify projects likely to be attractive to donors	Bring objectivity to the selection of projects (e.g. those with evident social or cultural benefits)
Research the donor market by individuals and families likely to be interested in your organisation and its projects (linkage and interest)	Use your knowledge of the community and your contacts to enhance the arts organisation's data
Identify and agree on a shortlist of potential donors likely to be interested in your organisation and projects (ability to give)	Critique the long-list, with the staff
Allocate team champions to pursue the relationship	Volunteer to play a lead role, where you have appropriate connections
Build the relationships and enhance your knowledge of the potential donors, through regular communications and special events	Attend social occasions, previews, first nights, work-in-progress events - any activities where potential or actual donors are being cultivated and board members can help
Build hypothetical donor cases for prospective good fit donors	Contribute to and critique the case
Develop marketing materials directed to prospective donors - both for the organisation and for each project	Contribute to and critique the materials especially if you have relevant marketing, pr, fundraising or other experience
Make the approaches and hold initial discussions with prospective donors	Help to set up meetings, where you have connections
'Make the ask'	Preferably as a peer of the donor, propose the specific amount and purpose (previously agreed with the staff)
Follow-up and confirm donation with a commitment	Ensure the follow up occurs
Record any recognition or other 'benefits' agreed	Ensure that there is appropriate recognition of donors, and that this is handled systematically
Monitor progress and report regularly on performance	Require periodic reports to the board on progress, and on the review of progress with donors
Nurture the donor relationship - set the scene for future donations	Attend activities where donors are being cultivated, and consider creative ways in which the relationship can be furthered

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