

Development for Conservation

Five Fresh Ideas for Building the Board You Need

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David Allen, Development for Conservation



**DEVELOPMENT
FOR
CONSERVATION**

An Important Starting Premise

Not everything that happens in Board Meetings is actually board work.

Sometimes it's:

- Volunteer organizing
- Event organizing
- Information dissemination
- Information gathering
- Social time



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Job Responsibilities of a Board

- Governance
- Management
- Fundraising
- Celebration



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Common Complaints

- Our Board is getting older; we need to recruit younger people
- We approached people to be on the Board, but they have turned us down
- We need a lawyer and a CPA, but we can't find either one
- We need rich people on the Board for fundraising, but we don't know any rich people



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Five Things

- Rethink the Recruitment Process
- Rethink the Orientation
- Become a Standard Bearer
- Board Evaluations
- Get Creative about Board Meetings



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1 Rethink the Recruitment Process




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What do Board Members Do?

- Board Directors
 - Attend all board meetings and events.
 - Serve on committees.
 - Give money.
 - Raise money.
 - Advocate.
 - Serve as Ambassadors back into their communities.
 - Know the projects. Know the finances.



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Desirable Attributes

- Passionate About the Mission
- Diversity (Cultural, Gender, Geographic, Economic, Political, Age, and so on)
- Leadership
- Smart, Curious, and Willing to Learn
- Integrity and Good Judgement
- Strategic and Analytical Thinking Skills
- Plays Well with Others
- Sense of Humor



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Ideas

- Recruit from your existing donors
- Recruit ACCESS
- Recruit LEADERS - people others will respect, take seriously, and follow
- Consider Board service as a major gift – after all, it is for the donor



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Ideas

- Approach Board recruitment as you would major gift donor cultivation:
 - The people you need most are probably not available to you right away.
 - They might need to be introduced to the idea, wooed, and ultimately “solicited.”
 - Sounds like donor development.



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Also think about ...

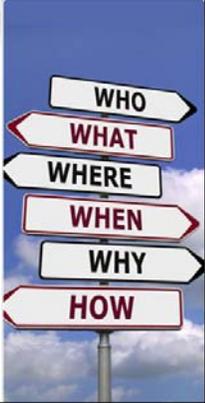
- Cluster Recruiting
- Barriers to Participation
- Term limits
- Ambassadorship
- Credibility
- Long-Term Leadership Needs
- Bench Strength



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Rethink the Orientation



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Re-Think

- Re-Think in terms of showing new board members what you want them to know.
- Re-Think in terms of practice.
- Re-Think in terms of the story they will tell others.



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Checklist Items

- Sit in on one meeting of each board committee,
- Visit a project site (go on a monitoring visit),
- Go on a Field Trip,
- Lead a Field Trip,
- Develop and practice an “elevator speech,”
- Call a donor to say thank you,
- Get to know a set of donor prospects,
- Attend an organizational event.



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Serve on the Finance Committee for the first year



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Become a Standard Bearer



Job of Standard Bearer

- One report on a land trust standard at least every four years.
 - Are we compliant?
 - Are we consistent?
 - Do we know what to do?
 - Are we sustainable?



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Affirmation

Without reservation, I believe this organization is compliant with both the letter and the spirit of the standard. The By-Laws, mission, plans, and policies are all internally consistent, and we apply them consistently as needs and opportunities present themselves.



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Board Evaluations



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Job Responsibilities of a Board Director

- Governance
- Management
- Fundraising
- Celebration



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The Job – Board Director

- Board Directors
 - Attend all board meetings and events.
 - Serve on committees.
 - Give money.
 - Raise money.
 - Advocate.
 - Serve a Ambassadors back into their communities.
 - Know the projects. Know the finances.



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Board Evaluations

- Chair
 - Knows, follows, and manages as needed the work of ALL the other committees.
 - Holds other board directors accountable.
 - Annually conducts one-on-one interviews with each board director to discuss current committee assignments, other board related activities, general thoughts and opinions, and his/her own giving for the current year.



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Get Creative about Board Meetings



"Everyone here? Good. Meeting topic: Setting world record for shortest meeting. All in favor say aye. Ayes have it. Meeting over."



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Creative ideas

- Fewer Meetings: 4-6 is plenty
- Irregular periods – for example: February, April, September, and November
- Schedule at least two years in advance
- 15 minutes on Fund Development at every meeting
- One meeting each year devoted to **gratitude**



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Creative ideas

- Consent agenda
- Written motions – come out of committee already seconded and ready for discussion
- Include "Information Only" items before the meeting actually starts
- Include "Social Time" after meetings



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Creative ideas

Redefine the Role of the Executive Committee

- FROM: Acts on behalf of the Board on urgent items in between Board meetings



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The Executive Committee

Ensures that all Board members arrive at Board meetings knowing what they will be asked to decide and how the decisions will get made

Ensures that all Board members have all the information they need to make a decision



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Encore Ideas – Scavenger Hunt for New Board Members

This essay was written by David Allen and originally posted on the Blog [First Thing Tuesday](#) on 17 January 2017.

Some ideas are worth re-presenting and re-considering as time and wisdom begin to shape them even further. This week, I'm thinking about board orientations – so-called “onboarding.”

I've written about this before (See [Rethinking Board Orientations](#)). But in the last few years, I've met many more board members than I knew then, and my impressions have helped shape and further refine my thinking.

Here's the gist: Let's say that we want board members who are fully prepared to make the strategic, critical, and *wise* decisions we ask of them at every meeting. Let's also admit that we rarely find such a person ready to go at their first meeting. Plug-and-play board members are hard to come by. Some might be well-versed in finance but know little about the business of land conservation. Others might know everything about fire ecology and squat about reading a balance sheet. The truth is that it can take several years for many board members to really feel comfortable making decisions or even asking the right questions.

How can we craft an onboarding experience that reduces everyone's learning curve?

One thing I know for sure: The two-hour model of Saturday afternoon orientation experience doesn't work. And NO-ONE reads the board manual – save the paper.

So my idea is to create a Scavenger Hunt – one that will take a year and a Guide to complete. Create a checklist of articles, activities, and social experiences that each board member is expected to complete within their first year of service. Assign a Guide (mentor) who is equally accountable for their completing the checklist prior to their first-year anniversary.

Don't give the newbies anything else to do. They come to meetings and they complete the scavenger hunt – that's all in their first year.

On the one-year anniversary of their board service, ask them to schedule a meeting with the Chair (and maybe the Guide, and maybe the Executive Director) to discuss how they might best fit into the current organizational structure.

In creating your checklist, consider what the organization might need them to learn about the business of conservation, the role of board members, how money flows into and out of the organization, and the personalities and politics that make everything interesting.

Here's a starter list:

BOARD ORIENTATION SCAVENGER HUNT CHECKLIST

To be completed within the first year of service:

1. Read and sign the Board Member Job Description
2. Read and sign the Conflict of Interest Policy
3. Sit in on one meeting of each of the organization's Standing Committees
4. Shadow an easement monitor on landowner visits for one day
5. Walk the trails of one of the signature properties the organization owns or has protected; (extra credit: walk the same trail twice – once with a Guide, and once as a Guide, showing the property to someone else)
6. Call three donors to say "Thank You" (with coaching)
7. Shadow a fundraiser on at least one donor visit
8. Attend one organizational event (annual meeting, gala, fundraiser, or similar)
9. Ask a Guide to walk you through the organization's project selection criteria and how it is applied to new projects
10. Visit the website (extra credit: give money through the web site so you can see how it works)

My hypothesis is that board members having checked off the above things during their first year will be better prepared for their duties as board members than if they had not. But taken a step further, board members having served as Guides for new board members will be better prepared as well. It's one thing to know something well enough to use it. It's quite another to know something well enough to teach it to others.

Last, I mentioned the end-of-year meeting with the Chair. This is the meeting where the Chair assigns the new board member to a committee or to committees. S/he should ask: What did you like/enjoy most about your first year? What would you like to learn more about? How do you see yourself fitting in most comfortably?

And my personal favorite: When it comes time for you to leave service, what would you like to look back on and say that you accomplished?

So think about this in terms of your own organization. What would you add to the Scavenger Hunt Checklist?

DAVID ALLEN

I am a non-profit organizational development consultant. I work with nonprofit organization boards to help their members learn how to be better leaders and advocates.

My background includes 30 years working in membership fundraising, major donor development, communications, and marketing. I worked for about half that time for Nature Conservancy (TNC) chapters in Oregon, Texas, and Wisconsin. In addition to my duties for the individual chapters, I served TNC as an internal fundraising consultant and major gift development trainer.



In 2000, I served as the vice-president of operations for the Wisconsin-based, international conservation organization Sand County Foundation, a position I held through mid-2009.

Gathering Waters Conservancy, a land trust service agency based in Wisconsin, called me in 2002 to ask whether I would be interested in teaching a seminar for Wisconsin land trusts on major donor development. From 2002, then, through 2009, I consulted on a nights and weekends basis with just a few clients each year.

In March of 2009, I launched my consulting business full-time using the name **Development for Conservation**.

Also in 2009, I partnered with Nancy Moore to form Conservation Consulting Group. Together we help land trusts prepare for accreditation by providing assessment, planning, and leadership coaching services.

I consider myself a strategic thinker, problem solver, facilitator, educator, and program developer who brings a particular passion for conservation and the environment.

Practice Competencies

Fundraising

- Development Audit
- Staff/Board Training and Development
- Major Gift Coaching
- Capital Campaigns

Organizational Development

- Strategy Development
- Practice & Process Assessment
- Problem Solving Facilitation
- Marketing

David Allen

Development for Conservation

David@DevelopmentForConservation.com

608-239-5006

608 West Dean Avenue
Monona, WI 53716

www.DevelopmentForConservation.com