



Executive Director Boot Camp

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Executive Director BINGO!

Try to fill every space on your card with the name of someone in the room

Can only use each person 2 times

You have 15 minutes.....and Go!

What is the role of the Executive Director?

- Manage Day to Day Operations
- Report to Board
- Work Closely with President/Chair
- Advise and/or Formulate Policies
- Ensure Compliance with Local/State/Federal Laws

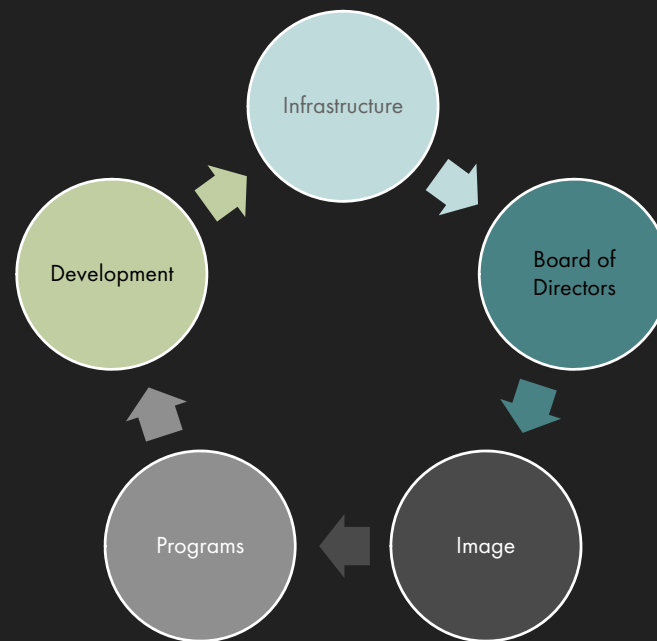
And the Executive Director Role Continues...

- Manage Relations with Donors
- Lead Other Staff
- Work with Committees
- Carry out the Strategic Plan of the Foundation
- Other Duties as Assigned – Big sigh

Can We Talk?

- Up to Date Job Description
- Set Expectations & Boundaries
- Engage Board of Directors
- Be Honest
- Report Outcomes
- Manage Time
- Jack of All Trades

Key Components of Education Foundations

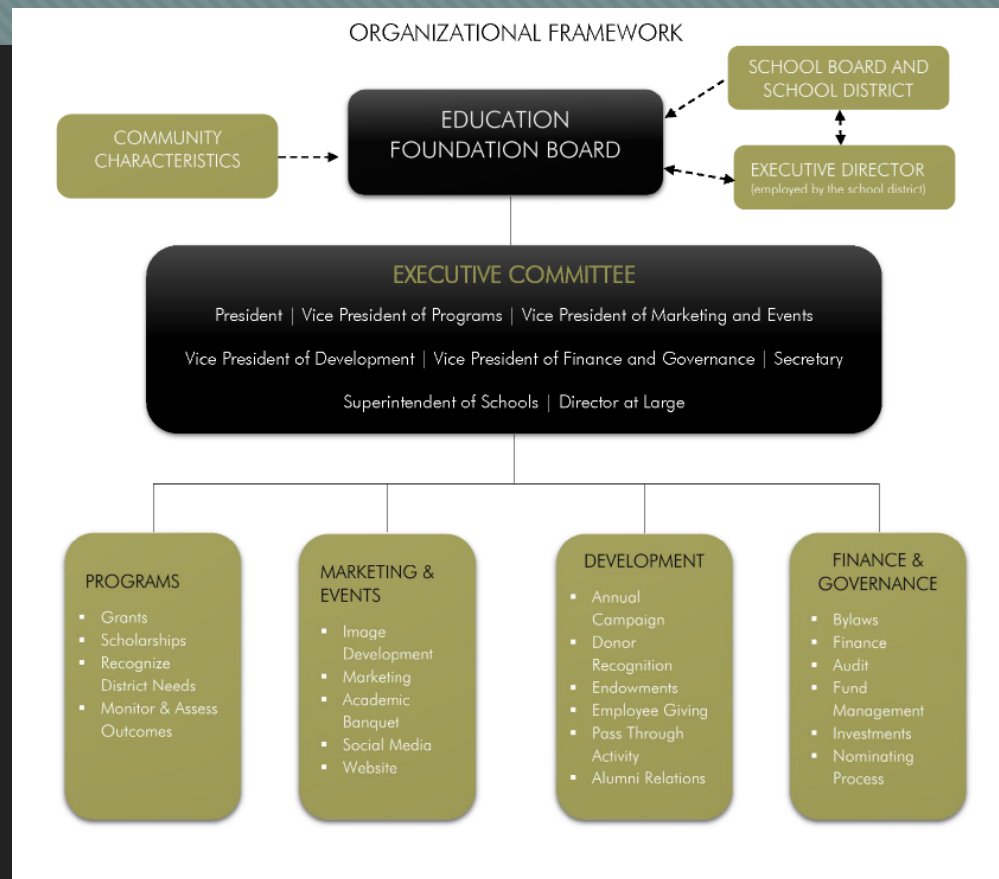


- Interconnected components are necessary to ensure success.

What is the Role of the Executive Director and the Structure of the Foundation?



Organizational Structure



Doing Business

- Corporate Documentation
- Minutes
- Policies & Guidelines
- Annual Report
- IRS Form 990
- Memorandum of Understanding

Infrastructure Roles & Challenges

- How do we process a donation? Is the process documented?
- How often are our bylaws reviewed?
- What is our cash flow?
- What is our operating costs vs program allocations vs fundraising costs?
- How does a board member access information?
- What is the protocol for communication with the executive director?

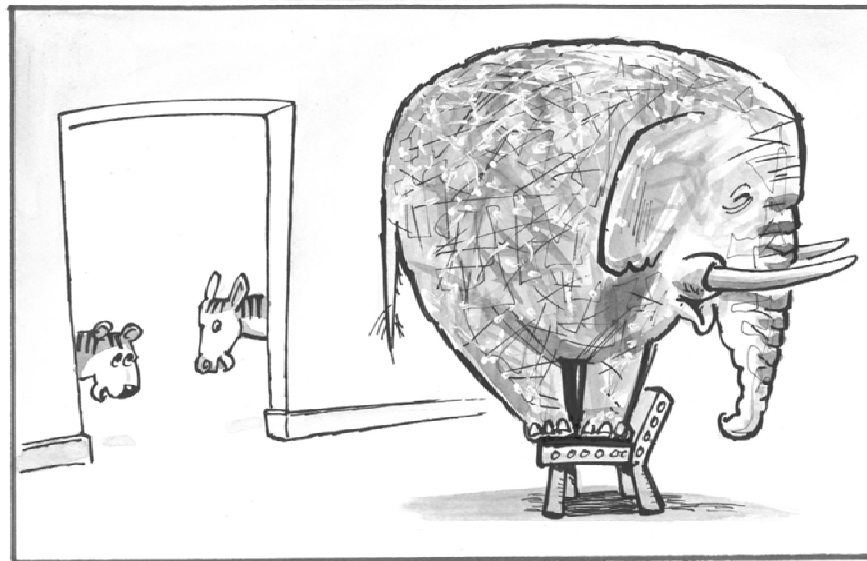
What is the Role of the Executive Director and the Board?

| The Board | Individual Board Member |
|--|-------------------------|
| Setting Organizational & Strategic Direction | Duty of Care |
| Ensuring Necessary Resources | Duty of Loyalty |
| Providing Oversight | Duty of Obedience |
| Fiduciary Responsibility | Ambassadors |
| Risk vs Initiative | Volunteers |
| Succession Planning | Donors |
| Sustainability | |

Board Member Engagement



Strong Chair



"WE NEEDED A STRONG CHAIR TO DEAL WITH THE ELEPHANT IN THE ROOM."

Board Meetings



Board Meeting Tips

- Lively & Engaging
- Videos
- Grant Recipient Showcase
- Open Forum
- Mission Moment
- Tours
- District Presentations
- Donor Testimony



Board Roles & Challenges

- What is the role of the Executive Director and Board Development?
- What happens if we are not making quorum at our meetings?
- Does the board conduct an annual planning retreat?
- How are board members on-boarded?
- How are officers elected? What is our succession plan?
- Are your board meetings lively and engaging?
- How do you deal with a negative or argumentative board member?

What is the Role of the Executive Director and Programs

- Developing funding priorities
- Developing a granting process
- Pivoting and changing funding priorities
- Incubating program initiatives
- Scholarships
- Alignment with the School District



Program Challenges

- What if the board is resistant to change?
- How do you measure the impact of programs funded?
- How do you get the school district to participate in aligning programs?
- How do you stop funding an initiative?

What is the Role of the Executive Director and Marketing/Events?

- Marketing Campaign and Initiatives
- Social Media
- Event Coordinator
- Outreach
- Talking Points
- Media Relations



Marketing and Event Challenges

- What if all marketing and event coordination falls on the executive director?
- How do I engage the board to be involved in marketing?
- How do I brand the image of the foundation?
- Why are we the best kept secret?

Role of the Executive Director and Fundraising



Campaigns

- **Annual Campaign**
- **Endowment Campaign**
- **Capital Campaign**
- **Events**
- **Business Collaboration**
- **Employee Giving**
- **Alumni**



Events: Fundraising or 'Friend'raising?

- Events should supplement, NOT REPLACE traditional fundraising
- Reasons to have an event
 - Increase visibility
 - Announce the beginning or end of a campaign
 - Thank people
 - Raise funds from people who would not give you money otherwise
 - Honor people who are aligned with your mission



Development Audit

DEVELOPMENT AUDIT

Fundraising Initiative: _____

Gross Revenue: _____

Number of Donors: _____

(underwriters, investment in mission, etc.)

Number of Participants: _____

(ticket holders, golfer, etc.)

Cost per \$ raised: _____

(financial return / total costs = per dollar raised)

i.e. \$5,000 financial return / \$2,000 total cost = \$2.50 per dollar raised

One time costs: _____

(i.e. signs)

Repeat costs: _____

(i.e. printing, postage)

Total costs: _____

Number of volunteer hours: _____

Number of staff hours: _____

Financial Return: _____

(gross revenue less total costs)

Other Return: _____

(awareness, fundraiser, programmatic, etc.)

Other Notes: _____

What Donors Want (Stewardship)

- Prompt, personal acknowledgement of their gifts.
- Confirmation that their gifts have been put to work as intended.
- Measurable results prior to being asked for another gift.



Implementing what has been learned today

- Questions?
- Participant Input
- Ongoing Support

Thank you!

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