

Orchestra Leadership Academy
Purposeful Boards, Powerful Fundraising

June 17-18, 2013

The Hyatt Regency at the Arch in St. Louis
315 Chestnut Street, St. Louis, Missouri 63012

It's never been more important for boards and staff to work together to solicit financial support. Perfect for board-staff teams, this session addresses the complementary roles board members play in their organization's fundraising and resource development. The seminar begins with a close look at board recruitment, structure, operations, and culture, knowing that weak boards don't raise funds effectively. The second part of the session focuses on how to involve board members in effective fundraising.

Topics covered include:

- Trends impacting governance and fundraising in the nonprofit sector.
- The stages of board evolution that impact board performance and why some nonprofits confuse volunteering with governance.
- Legal obligations of nonprofit boards and best practices surrounding board roles and responsibilities and board recruitment.
- How the lack of effective board structure can kill fundraising.
- Periodic fundraising exercises you can do with your board.
- How to get your board to articulate your organization's value to the community.

Faculty: Chuck Loring, MBA, CFRE, senior partner, Loring, Sternberg, & Associates

Monday, June 17, 2013

1:00-1:15pm **Welcome and Course Overview**

1:15-1:45pm **Trends in the Charitable Sector**

- The outlook for giving
- Tax and policy questions
- Sector growth and sustainability
- Hot topics

Boards
Powerful

1:45-2:30pm **Best Practices in Board Roles & Responsibilities**

- Legal obligations of your board
- Assessing your board

2:30-2:45pm **Break**

2:45-4:15pm **Thinking about Board Structure & Operation**

- Board size
- Effective meetings
- Most common by-law mistakes
- Board committee and task forces
- The failure of Executive Committees
- Use of technology in governance
- Conflict of interest
- Officer terms and board terms

4:15-4:30pm **Break**

4:30-6:00pm **Strategic Year-Long Board Development**

- Making your Nominating Committee go away
- The Governance model of recruitment
- The board matrix
- Updating the expectation statement
- Orientation, education, and evaluation

6:00pm **Adjourn**

Tuesday, June 18, 2013

8:30-8:45am **Review of Day One and Questions**

8:45-9:15am **Effective Board Fundraising**

- Willing versus able board members
- Developing a fundraising culture
- The projected outlook for fundraising
- Why we love Bill Gates and Warren Buffet

9:15-9:30am	Understanding the relationship of the Fundraising Team <ul style="list-style-type: none">• Articulating the mission• The role of staff and board
9:30-10:00am	The Process of Cultivation, Solicitation, and Stewardship <ul style="list-style-type: none">• This is not about the ask
10:00-10:15am	Break
10:15-11:00am	Type of Donors <ul style="list-style-type: none">• Why different donors play differently• Why the board must understand bequests
11:00-11:30am	Engaging Board Members in Individual Activities <ul style="list-style-type: none">• What is meaningful for your orchestra?
11:30am-12:30pm	Questions & Your Next Steps
12:30pm	Adjourn

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