
**The AAA Approach: Boards,
Fundraising Expectations and
Accountability**

Please take this time before the start of
the session to silence your cell phone or pager.

Your feedback is valuable. At the end of the session,
we ask that you take a moment to complete an evaluation form.

Thank you.

Agenda

- What we saw in successful MGI stations relative to board and volunteer involvement
- Building a culture of philanthropy: the Board's role in philanthropy, development and fund raising
- Board AAA Rating: Ambassador, Advocate, Asker
- Benefits of the culture of philanthropy and AAA
- Summary and conclusion

Tapping Into Your Board's Full Potential: Implementing the AAA Approach

Step 1:
Determine board member motivation through the "AAA" board engagement program

Defining a AAA Board

- A board with a AAA Rating is one where every board member is motivated to be an Ambassador, Advocate and/or Asker – tapping into board member motivation and designing assignments that are specific and geared to the board member's motivation

Roles Board Members Play in Creating a Culture of Philanthropy

- Ambassadors
 - Making friends
 - Building relationships
- Advocates
 - Making the case (formal and informal)
 - Key to solid board recruitment
- Askers
 - Making the ask
 - "Front line" fund raisers

Ambassadors

- A role everyone can play
- Starring roles in cultivation of prospective donors and stewardship of continuing donor-investors
- Need to be well oriented and coached in the message
- Masters of the “elevator speech” (and the “elevator question”)
- Catalysts for donor-investor renewal
- Who on your board plays this role?

Advocates

- On the golf course or in the car pool – these individuals are strategic in their information sharing
- They may also advocate for your station on a more formal basis with government, another organization with which you are partnering or an institutional funder
- Are informed not only of the case for support, but also are well integrated into your strategic plan and vision
- Are well coached on desired results of the advocacy and handling objections
- Who on your board plays this role?

Askers

- Enjoy asking
- Well informed, well trained
- “Matched” with prospective donors (or current donor-investors) for maximum possibility of success
- Teamed with another board asker or staff leader
- Staff organizes the ask so the Asker’s focus can be on the single purpose of getting (or renewing) the gift
- Benefit from the work of the Ambassadors and Advocates
- Who on your board plays this role?

The AAA Rating

- Some board members will do it all
- Most board members excel at one or two
- Motivation is increased when board members are assigned to roles that draw on their skills and align with their comfort zone
- Create a AAA program on your board that engages each member in a role that contributes to your station's advancement and helps them feel respected and engaged
- As motivation increases, you will find board members moving among the roles – even to Asker!

Review of AAA Handouts

Survey
Grid

Tapping Into Your Full Potential: Implementing the AAA Approach

Step 2:
Identify organizational attributes that
make development an easier task

What Engages Boards in Resource Development?

- Philanthropy comprises four functions: giving, asking, joining and serving – and for board members, it is NOT multiple choice. They need to do it all because they are the leaders and models for other donors and potential board members.
- There are seven principles for organizational success that make it easier for board and staff members to carry out resource development for annual and capital donor development and fund raising.

7 Practices of Successful Public Television Stations

1. Are certain of their mission
2. Have a compelling vision for their station and for their community if their vision is successful
3. Determine and market their values
4. Engage donors in ways that help them self-actualize

7 Practices of Successful Public Television Stations

5. Are accountable, transparent and willing to disclose sources and use of funds as well as impact of programming and outreach
6. Practice patience and persistence in working with issues, communities and donor-investors
7. Keep their sights on the long term impact of investment and the long term engagement of donors
How do you measure up? Discussion

Creating a Culture of Philanthropy: Board-Staff Partnerships Are Key

- Set high standards for volunteer service and be sure you understand the implications of those standards for board and committee composition, commitment and roles
- Be sure staff understands and respects the potential and the limitations of volunteer/board member time, involvement and commitment
- Forge partnerships through trust, respect, understanding of mission, common vision, shared values
- Engage the full development team

The Full Development Team

- All staff (administration, program, etc.)
- Board
- Non-board volunteers
- Well-stewarded donors
- Tasks:
 - Ambassadors
 - Advocates
 - Askers

Tapping Into Your Full Potential: Implementing the AAA Approach

Step 3:
Create and communicate mission,
vision and values

WTVP Mission Statement

Intellectual, creative and technological capacity is a requirement of an engaged democratic society. WTVP uses the power of public telecommunications to inspire, enhance and inform our community.

Public Broadcasting Atlanta Mission Statement

- We serve community; we enhance life. We educate, entertain, empower. We broaden perspectives, create joy, expand knowledge. And through our endeavors, we connect people to each other and the world.

WTVP Vision

Central Illinois is reinventing itself as a learning-based community. WTVP will use its technology, facilities and creative talent to play a leading role in our region's educational, medical, economic and cultural transformation

Public Broadcasting Atlanta Vision Statement

- We believe that communication is the foundation of civilization. It is the path by which knowledge, understanding, discourse and values are achieved, nurtured and passed down. We envision our communities as informed, energetic, engaged and with a pervasive sense of interconnectedness to each other and to the world. And we believe that our role as a trusted enabler of communication is fundamental in building the beloved community to which we aspire.

Values Role in AAA

- Values are the shared beliefs that lead to long term investment of time and money
- People only join or serve organizations whose values they share
- Values are the basis of issues, and issues drive 21st Century philanthropy
- We uncover and develop shared values through our messaging, stewardship and outreach/interaction with members and donors
- Shared values are the basis of volunteer commitment as well as donor loyalty and retention

WTVP Values

- Leaders and storytellers
- Independence from political pressure
- Belief in the strength and future of the community
- Pursuit of knowledge
- Uplifted and inspired by the arts
- Collaborations and partnerships
- Lifelong learning
- Nurturing and safe media environment
- Innovative application of technology
- Strength of mind requires both serious discourse and enjoyment and excitement

Tapping Into Your Full Potential: Implementing the AAA Approach

Step 4:
Understand the full framework of
engagement for AAAs (philanthropy,
development, fund raising)

Innovative Philanthropy: 4 Big Ideas to Keep Boards Motivated

- The most powerful innovation is in attitude about community resource development (people and money)
 - Knowing that people give to you because you meet needs, not because you have needs (they invest in results)
 - A gift to you is really a gift through you into the community
 - Pride, not apology when asking; opportunity not obligation
 - 21st century philanthropy is viewed by increasing numbers of donors as social investment

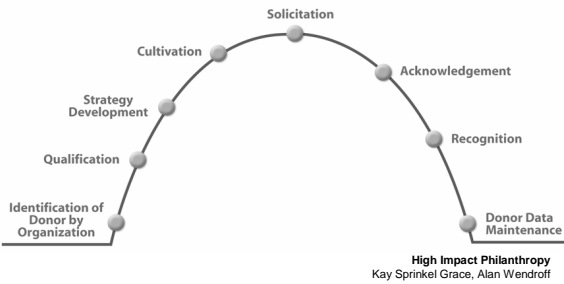
The Board's Roles in the Development Process

- Identification
- Qualification
- Development of Strategy
- Cultivation
- Evaluation
- Solicitation
- Follow up
- Stewardship
- Renewal
 - Each step draws on AAA functions

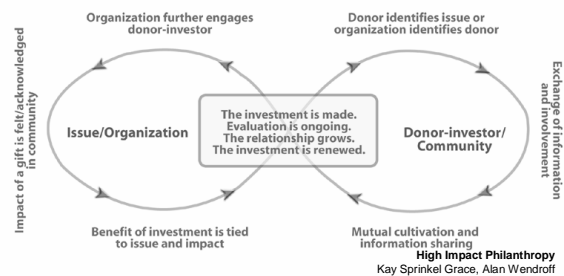
Moving from Transaction to Transformation: Implementing the AAA Approach

Step 5:
Make the most significant shift in
engaging your board in giving and
asking

Transactional Bell Curve: The Way We Have Asked



Transformational Infinity Loop: What We Need to Do Now



Maintaining Volunteer (and Donor)
Motivation Requires Information
About...

- Program impact
- Financial performance
- Return on donor investment relative to the donor's values
- Responsiveness to changes in organization and marketplace
- Willingness to implement solid systems and structures to support change

**Infinity Loop: Keeping Your
Donor-Investors Engaged**



High Impact Philanthropy
Kay Sprinkel Grace, Alan Wendroff
Adapted by Papilia, 2003

AAA and the Culture of
Philanthropy

Summary of ideas and impact

What Board Members Need to Become Partners and Champions of Philanthropy

- This is the starter list:
 - Transparency
 - Accountability
 - Disclosure
 - Clarity
 - To understand the mission, vision and values
 - To believe in what you are doing
 - Are these true for your board? What else would you add?

Creating a AAA Board and A Culture of Philanthropy

- How to keep the culture alive!
 - Board, staff and non-board volunteer training and orientation
 - Steady internal marketing and communication about the impact of your philanthropy on your programs, outreach and community
 - Positive feedback – showcase successes and encourage people to keep engaging people (social networking, web site, cultivation)
 - Invest in it: retreats, materials

Creating a AAA Board and A Culture of Philanthropy

- Encourage each other (board and staff) to...
 - Be a champion and create champions
 - Be a leader and create leaders
 - Treat each gift as an investment; each donor as an investor
 - Be a steward of investments and investors
 - Believe in philanthropy: voluntary action for the public good based in shared values
 - Market your successes in your community

Creating a AAA Board and A Culture of Philanthropy

- Summary of benefits of creating a culture of philanthropy
 - More people engaged
 - More money raised
 - More long-term investors
 - More impact in the community
 - AAA Rated Board

Board Leadership to Sustain the Culture: Tasks of Leaders

- John W. Gardner's 9 Tasks of Leaders:
 - Envision goals
 - Affirm values
 - Motivate
 - Manage
 - Achieve workable unity
 - Explain

Gardner's 9 Tasks (2)

- Serve as a symbol
- Represent the group externally
- Renew (as a board member)
 - John W. Gardner, On Leadership
- + A 10th, Encourage the heart
 - Jim Kouzes and Barry Posner (The Leadership Challenge):

A Closing Thought....

- “The vineyards of philanthropy are pleasant places, and I would hope good men and women will be drawn there. Most of all, I would hope it will be better understood that if these vineyards are to thrive and bear their best fruit, they must always have first-class attention.”

• Harold J. “Si” Seymour, [Designs for Fundraising](#)

The AAA Approach

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