

THE BOARD'S ROLE IN PARTNERSHIPS AND FUNDRAISING

PURPOSE

To clarify the board's role in each of the steps for securing business partnerships or philanthropic support.

SECURING AND MANAGING BUSINESS PARTNERSHIPS

In each of the steps towards building partnerships with the business sector there is a role the board can play, individually or collectively:

SPONSORSHIP / PARTNERSHIP STRATEGY	ROLE OF THE BOARD
Build the organisation's business case for a commercial partner.	Contribute to and critique the draft Business Case
Identify projects likely to be attractive to commercial sponsors	Inject objectivity into the evaluation of projects and aspects of the organisations' work – the key staff may be too close to the projects to see which might prove attractive to a sponsor or partner
Build a business case for individual projects	Review draft material prepared by the staff, consultants (or other board members) or contribute directly to assembling the case, especially if you have relevant marketing, PR, sponsorship or other experience
Research market by industry sectors to identify sectors likely to benefit from your company's assets; and then individual companies likely to be a 'good fit' for your organisation	Share your knowledge of specific industry sectors, and the reasons why they may or not provide a match for your organisation.
Identify and agree on a shortlist of potential partners likely to be interested in your organisation and its projects	Utilise any knowledge you have of the business sector, especially firms in the local area. Feed in news items and industry trends.
Allocate team champions to pursue the relationship	Ensure there are clear roles and responsibilities. Put your hand up for a role, if it is appropriate.
Build hypothetical business cases for prospective good fit partners	Contribute to and critique the drafts
Develop general marketing materials directed to business partners – both for the organisation and for each project	Contribute to and critique the drafts
Make the approaches and hold initial discussions with decision makers of prospective business partners	Effect introductions where possible. Where you have contacts, consider whether it is helpful for you to attend an initial meeting, alongside the staff
Formulate customised proposals	Critique
Make formal presentation to potential partners; 'Do the ask'	Attend the meeting, if it is appropriate – dependent upon your skills, your relationship with the potential partner, and the capabilities of your organisation's staff
Follow-up and confirm partnership commitment	Ensure follow up has occurred, either through establishment of procedures and routines, or through judicious questioning at board meetings
Negotiate a contract including measurement agreements	Ensure an adequate contract is in place. If the stakes are high, the board may wish to review the detail of the contract
Monitor progress and report regularly on performance	Require periodic reports to the board on progress, and on the review of progress with partners
Nurture the relationship	At the staff's request, attend meetings, social occasions, previews, first nights, work-in-progress events – any activities where potential or actual partners are being cultivated and board members can help

SECURING PHILANTHROPIC SUPPORT

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 a 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 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

The board's engagement with the preceding task list will vary according to the professional infrastructure of the organisation. If there is an experienced Development Officer, the board may restrict its review and critiquing of material to the establishment and settling in of the post-holder. If there is no Development Officer, and relatively inexperienced staff, the board may choose to become far more closely involved.

REFERENCES

- > Fishel, D, The Book of the Board, Federation Press, Sydney, NSW (2003; 3rd edn. 2014) – Australia's standard reference book for board and committee members of non-profit organisations.
- > There is a comprehensive range of advice on the [Creative Partnerships Australia](#) website

ABOUT POSITIVE SOLUTIONS

[Positive Solutions](#) offers a range of services to non-profit boards throughout Australia. [Board development workshops](#) and detailed board reviews can be tailored to the needs of each organisation. To find out more about how Positive Solutions can help you, contact: info@positive-solutions.com.au or call 07 3891 3872.

THE BOOK OF THE BOARD

[The Book of the Board](#) is Australia's standard reference book for board and committee members of non-profit organisations. Authored by Positive Solutions Director, David Fishel, and currently in its third edition, The Book of the Board provides clear guidance on the role of the non-profit board, formal and legal responsibilities, and the ways in which the board can maximise its effectiveness for the organisation.

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