



Fundraising - Class 1

Board Leadership & Fundraising Strategy for Community Foundations

Table of Contents - Fundraising Class 1

Module 1: Orientation and Learning Objectives.....	1
Module 2: Fundamentals of Board Leadership.....	2
Module 3: Fundraising as a Board Responsibility.....	5
Module 4: Board Composition and Recruitment.....	6
Module 5: Succession Planning.....	7
Module 6: Strengthening Board Dynamics.....	7
Module 7: Fundraising Action Planning.....	9

Estimated time to complete: 3.5 hours

Module 1: Orientation & Learning Objectives

Purpose of the Course

This course is designed to help current and prospective community foundation staff and board members understand and strengthen their leadership role, particularly around governance, strategy, and fundraising. You'll be guided through key responsibilities, effective board practices, and actionable tools.

Class Objectives

By the end of this class, you will be able to:

- Understand and articulate the key responsibilities of board members.
- Evaluate your board's composition, engagement, and effectiveness.
- Develop strategies for board involvement in fundraising.
- Apply succession planning and onboarding practices.
- Strengthen governance and oversight capacity.

This class will explore four key components of a strong fundraising strategy that will support your community foundation's short-term and long-term goals. The four components or strategies are:

- Leader Strategy - Board giving
- Cause Strategy - Project-based fundraising solutions
- Strategy - Planned giving and other vehicles
- Impact Strategy - Institutional and corporate giving

It's true that at different stages and lifecycles of your community foundation you will lean more on one strategy than another, but all of these are important approaches to increasing funds for your community foundation.

Action Activity:

- Why are you participating in this course? Write down your learning goals and what success will look like for you.



Fundraising - Class 1

Board Leadership & Fundraising Strategy for Community Foundations

Module 2: Fundamentals of Board Leadership

Six Key Responsibilities of Community Foundation Boards

Explore the major domains of board service:

1. Governance



Governance

- Strategy
- Policy
- Committee structure

Board members are responsible for setting the strategy/vision for the community foundation. In addition, they are responsible for approving (or in some cases establishing) the policies and legal documents that govern the community foundation, including the articles of incorporation, bylaws and committee charters.

2. Fiduciary Responsibilities



Fiduciary Responsibilities

- Budgets
- Financial health of community foundation
- Hiring of investment advisory firms, accounting firms, etc.

Board members are responsible for reviewing and approving annual budgets, investment direction and execution, policies to uphold fiduciary duties of care, loyalty, and obedience.



Fundraising - Class 1

Board Leadership & Fundraising Strategy for Community Foundations

3. Legal, Ethical & Regulatory Compliance



Legal, Ethical & Regulatory Compliance

- Regulatory requirements
- Legal restrictions
- Ethics and values

Board members are expected to understand IRS regulations for community foundations. In addition, board members should have an understanding of the legal restrictions and requirements annually of community foundations. Board members should uphold the highest ethical standards and embody the values of the community foundation.

4. Fundraising & Stewardship



Fundraising & Stewardship

- Direct support
- Leverage networks
- Stewardship

Board members are the “friends and family” of the community foundation and must be the first to step up with donations of time, talent, and treasure. Beyond financial capital, board members can and should contribute network and intellectual capital.



Fundraising - Class 1

Board Leadership & Fundraising Strategy for Community Foundations

5. Community Ambassador



Community Ambassador

- Advocate or ambassador
- Lift up issues
- Feedback loop

When opportunities arise, board members can share their stories and impact of the community foundation, as well as engage community members in the advancement of the mission of the community foundation

6. Grantmaking Oversight



Grantmaking Oversight

- Establish committee
- Review grant recommendations
- Evaluate effectiveness

Board members establish committees to review and recommend grant investments in the community. Approval by size of grant should be outlined at the discretion of the board, in addition to follow up funding considerations.

Action Activity:

For each of the six areas, rate your board's current strength on a scale from 1 to 5. Where are the biggest gaps? Where are you excelling?



Fundraising - Class 1

Board Leadership & Fundraising Strategy for Community Foundations

Understanding Governance

Boards are responsible for ensuring mission alignment, strategic planning, and executive oversight.

Self-Reflection: Does your organization have a living strategic plan? How often is it reviewed or referenced in board discussions?

Action Activity:

Review a recent board meeting agenda. How much of the time was spent on governance (strategy, oversight) vs. operations?

Module 3: Fundraising as a Board Responsibility

Creating a Culture of Fundraising

A fundraising culture is one where all board members understand their role in supporting resource development—financially and as ambassadors.

Mini Case Study:

Imagine two foundations. Foundation A has 100% board giving and peer fundraising. Foundation B has 30% giving, and fundraising is solely staff-driven. Which is more sustainable? Why?

While there is no "right answer," it is important to consider the strengths and weaknesses of your board and staff. Sustainable fundraising requires that both staff and board members are playing an active role in soliciting gifts and uncovering opportunities.

Action Activity:

Identify one step your board could take to increase its fundraising involvement (e.g., peer-to-peer asks, donor thank-you calls, giving at a leadership level).

Understanding the Board's Role

Your board members don't all need to ask for money—but they should all support the fundraising process by:

- Making a personal contribution.
- Opening doors to their networks.
- Stewarding donors through thank-yous and engagement.

Action Activity:

List three non-asking roles board members can take in fundraising. Which could you implement next quarter?



Fundraising - Class 1

Board Leadership & Fundraising Strategy for Community Foundations

Self-Reflection: How comfortable are your board members with fundraising? How do you build confidence in this area?

Module 4: Board Composition & Recruitment

Evaluating Your Current Board

Strong boards are diverse in experience, skills, and geography.

Application Activity: Use the board matrix at the end of the curriculum to map out what you have and what you need:

- Geography
- Professional background
- Age or generation
- Network access
- Prior board experience

Analysis Prompt:

What skills or backgrounds are missing? What gaps might affect fundraising or strategic oversight? Are they reflective of the communities you serve? Do you have professional expertise that would support the mission and impact of your community foundation? Are they willing to advocate for the community foundation? Do they have the capacity to financially support the community foundation? Are members aligned with your vision, mission and values? Are members effective at collaborating and working with a variety of stakeholders?

Recruitment and Onboarding

Recruitment should be intentional, based on clear roles, and followed by meaningful onboarding.

Suggestions for Recruitment

- Write a board member job description.
- Create a skills assessment of current board members to identify needs.
- Ask board members to help identify new board prospects.
- Consider recruiting current donors of community foundation.
- Consider recruiting leaders who have influence in community.
- Make sure the foundation's values and purpose align to your recruitment efforts.

Suggestions for Onboarding

- Have a formal, consistent process for onboarding new members.
- Consider electing board members in a group or class for a group onboarding.
- Start onboarding with mission, vision, values, and programs of the community foundation.
- Share and review the job description.
- Make it fun! Socialize!



Fundraising - Class 1

Board Leadership & Fundraising Strategy for Community Foundations

Action Activity:

Draft an onboarding plan for new members, including:

- What they can expect in their first 30 days
- Key documents
- Introductions and mentorship assignments
- Training needs

Module 5: Succession Planning

Leadership Continuity

Good succession planning ensures smooth transitions and long-term sustainability. Consider establishing a board development committee or nominating committee to focus on this task.

Questions to Consider:

- Do you have a plan for rotating officers or committee chairs?
- What institutional knowledge is lost when members cycle off?
- Are term limits enforced?
- How many members do you need to effectively oversee the community foundation?
- How can you ensure that institutional knowledge is preserved?

See how potential new members collaborate and works with current board members by inviting them to volunteer on a committee first. As the needs of the community foundation change, modify the make-up of the board.

Action Activity:

Draft a succession timeline: When are key leaders rotating off? What roles do you need to start planning for now?

Module 6: Strengthening Board Dynamics

Productive, Purposeful Meetings

Effective boards have strong communication, clearly defined expectations, and productive meetings. It is imperative that board members maintain the balcony perspective – they only manage the Executive Director/President/CEO and should not be involved with personnel at lower levels or get too in the weeds with operations.

Checklist:

- Are roles and responsibilities documented and understood?
- Is the board-staff relationship clearly defined?
- Are meetings focused on strategy and mission?



Fundraising - Class 1

Board Leadership & Fundraising Strategy for Community Foundations

Robert's Rules:



1
Reading and Approval
of Minutes



2
Reports of Officers,
Boards, and Standing
Committees



3
Reports of Special
Committees



4
Special Orders



5
Unfinished Business
and General Orders



6
New Business

Many nonprofits follow Robert's Rules of Order, a parliamentary procedure first published in 1876 by Henry Martyn Robert that provides a standardized framework for conducting meetings. Adhering to these rules can keep your meetings consistent and efficient. On the other hand, Robert's Rules can be dense and overly complicated, offer limited flexibility, and can make it difficult for less-represented perspectives to be heard.

Action Activity:

Redesign your next board meeting agenda. Allocate time to each major item, ensuring strategic topics get priority.

Navigating Conflict or Inactivity

Board conflict is natural. Clear processes and consistent expectations can prevent dysfunction.

Scenario Prompt:

A board member regularly skips meetings and doesn't respond to emails. How would you address this? What policies or norms could help? How could their board member peers be activated to help?

Self-Reflection: Do your bylaws include attendance requirements or removal procedures?



Fundraising - Class 1

Board Leadership & Fundraising Strategy for Community Foundations

Module 7: Fundraising Action Planning

Clarifying Your “Why”

Effective fundraising begins with personal commitment. Take some time with your board to reconnect with your mission.

Action Activity: “Exploring Our Why”

Your individual and the board’s collective “Big Why” is an important piece of grounding our philanthropic work together as a community foundation. Grab a pen and paper and begin by exploring the why behind what you do. Spend five minutes to ask yourself: “Why do you support the Community Foundation? What drew you to this work?” These reflections can be a great start to individualized elevator speeches.

Setting the Stage for Success

Many board members will not have any previous experience in fundraising and may find it intimidating. Clear expectations and directions are imperative to successfully engage your board members in fundraising. Set them up for success!

Fundraising Readiness Checklist:

- Have you set a board giving policy?
- Have you provided fundraising training to your board members?
- Do board members have talking points about your impact?
- Are fundraising goals included in board evaluations?
- Have board members had the opportunity to reflect on how they can each individually support fundraising efforts?



Fundraising - Class 1

Board Leadership & Fundraising Strategy for Community Foundations

Action Plan Template:

- Poll board members on their experience and comfort with fundraising and identify helpful trainings.
- Set a giving goal for board members.
- As a group, identify three ways each board member can engage donors.
- Create a calendar of engagement and stewardship.

Final Assignment: Personal Action Plan

Use everything you've explored to develop a personal plan to strengthen your board's leadership and fundraising.

Your plan should include:

1. One immediate change you will implement.
2. A goal related to board composition or engagement.
3. A long-term strategy to improve board fundraising culture.

Self-Reflection: What is one thing you've learned in this course that changed how you think about board service?

Click to view and download the Board Matrix.

To utilize this file, click the link above which will take you to an editable Canva file. Canva is a graphic design tool. Click on the option for Canva creates and open the spreadsheet on your computer. You may be prompted to create a free account to utilize this tool.

Alternatively, you can use the board profile pages below to capture information from your current and prospective board members and then create your own spreadsheet to analyze the data.



Fundraising - Class 1

Board Leadership & Fundraising Strategy
for Community Foundations

Board Member/Prospect Profile Summary

Name: _____

Board Service:

Initial Contact Date/Notes:

Board Start Date:

First Term End Date:

Second Term End Date:

Board Role:

Committee:

Alumni:

Main Expertise/Interest:

Personal Contribution:

Annual Pledge/Gift Personal:

Annual Employer Match:

Pro Bono Service:

Pro Bono Service Value:

Time	Talent	Treasure	Ties	Testimony
yes/no	yes/no	yes/no	yes/no	yes/no



Fundraising - Class 1

Board Leadership & Fundraising Strategy for Community Foundations

Professional:

Employer:

Role:

Other Affiliations:

Skillset:

Economic Development	Arts & Culture	Hospitality & Events	Nonprofit
Philanthropy/ Fundraising	Real Estate/ Development	Finance	Legal
Education	Marketing/PR	HR	Community Building
Other			