

**Idaho Commission for Libraries  
December 12, 2019 Commissioner Work Session  
Executive Summary**

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The role of an appointed state commissioner and a nonprofit board trustee/director is similar, and different. As the ICfL Commissioners consider your role or roles moving forward, here is some background on advocacy and fundraising best practices for nonprofit boards.

**Advocacy**

**What's the role of a nonprofit board trustee with regard to advocacy?**

In a typical nonprofit organization, advocacy is a powerful way to leverage the important work that your organization does. Board members — as influential community leaders — can help increase the likelihood of your nonprofit's success by engaging in advocacy. Being an advocate is directly connected to each board member's fundamental responsibility to champion the organization's work — to stand for your mission.

By joining a board, an individual is making a public commitment to support and strengthen an organization by providing her or his leadership, expertise, and influence to advance the organization's mission and impact. Many boards spend a lot of time "going inside," focusing on their organization's internal matters, such as accountability, finances, and programs. And while this kind of oversight is important, board members must also advance their mission by "going outside" the organization serving as connectors, ambassadors, and advocates.

According to BoardSource's Ten Basic Responsibilities of Nonprofit Board Members, the definitive resource on the core roles and responsibilities of nonprofit board members: The board's responsibility to advocate is about fulfilling your organization's mission. "A commitment to the organization's mission should drive the board's priorities...boards and their members should be conscientious ambassadors and advocate for their organizations." Each individual board member should be an ambassador for the mission. "While advocacy as an organizational strategy pertains to the full board, it is individual board members whose voices...matter the most."

Board members have a unique and important voice that decision-makers need to hear. The voice of the unpaid, volunteer board member, acting or speaking out of altruism and passion for a worthy cause, is potentially much more influential than the highest paid lobbyist. Never underestimate the impact that a volunteer board member [can have].

**How Can Nonprofits Engage in Advocacy?**

Many organizations avoid advocacy because they think that it is somehow wrong. But the truth is, as a nonprofit organization, you have a right and a responsibility to advocate for or against

decisions that could help or hurt your organization’s mission. Advocacy is a broad term that covers a range of activities, including the following:\*

Legislative Lobbying:

- Working for or against a specific piece of legislation. Most nonprofits are allowed to engage in a limited amount of legislative lobbying, which can be a very important way to advance — or protect — your organization’s mission and impact.

Election-Related Activities:

- Nonprofit organizations may engage in nonpartisan voter registration, education and turnout activities. However, supporting or opposing a specific candidate (or set of candidates or a political party) is never allowed for 501(c)(3) organizations, and not what we are talking about when we talk about advocacy.

Everything Else:

- There are many other forms of advocacy — public education, research, and seeking executive or administrative actions, to name a few. These are perfectly appropriate activities for nonprofit organizations.

### **What Does Board Advocacy Look Like?**

As a board member, what does it really mean to be an advocate for your mission? Broadly defined, you are advocating when you engage people in supporting your nonprofit’s mission. Those people could be anyone in your community — government officials, business leaders, the news media, and others in the charitable sector.

Advocacy can be:

- Asking the zoning board for permission to have a farmer’s market in an underserved neighborhood
- Requesting a parking variance to allow for a meal truck to serve homeless people in a park
- Educating an elected official about the value of a job training program that uses public funding
- Partnering with government agencies to use a public building for a youth program
- Convening community leaders at times of natural disaster or human crisis to develop solutions for the community and promote healing

If you have a passion and a voice, you have what it takes to be an advocate. And it starts by asking yourself: Who can I talk to today to advance our mission?

### **Fundraising**

#### **What Role do Boards and Individual Board Members have in Nonprofit Fundraising?**

Fundraising is one of the major responsibilities of a nonprofit board of directors/trustees. A central concern of the board is ensuring that the organization has the resources necessary to

pursue the strategic plan. It is also the board's fiduciary obligation to see that resources are properly used. Most important, boards are entrusted with advancing the mission of their organization and serving as representatives of the community (the community can be considered a nonprofit's shareholders).

The board's role in fundraising is to provide leadership, financial support, and connection to donors and potential donors. The board must be structured to meet the primary needs of the organization. And it needs to be prepared to effectively pursue the fundraising goals it establishes in support of the organization. The board works in conjunction with the staff to bring great influence and strength in support of the organizations broader fundraising plan with the staff driving the day-to-day execution of most activities.

Typically, the boards of organizations with significant, ongoing fundraising needs have a standing committee for resource development. Such committees should be chaired by and include board members (although not necessarily exclusively). Like other board committees, a fundraising committee functions as the formal mechanism through which plans are developed and brought to the board for approval and execution.

Board members begin all fundraising efforts with their best prospects - themselves.

While the fundraising/development committee may have the more formal and focused responsibilities, all board members have an important role to play. Preparation for fundraising is greatly aided when all board members participate in the planning process, reading and providing feedback on development of the case for support, understanding the development strategies being planned, and understanding their collective and individual roles.

Advocating on behalf of an organization is an important early part of the fundraising process. (There's that advocacy word again!) Board members bring two critical forms of leverage to the process: reach into the community through their own spheres of influence and the collective volume of their connections. Board members should look for opportunities to introduce others to their organization and to educate them about the importance of the mission. As advocates, board members should always be ready to tell the story of the organization and articulate the main points of case for support. It is not necessary for board members to walk around with every detail and statistic. A few key statistics and a story or two illustrating the good work of their organization, combined with the board member's passion are more than enough to initially engage the prospect.

While there are many opportunities for individual board members to participate in fundraising, they can be most effective in securing major gifts. As leaders for whom the nonprofit organization is a priority, board members begin all fundraising efforts with their best prospects - themselves. Understanding that in the nonprofit arena time is NOT money, board members make their cash gift first in order to be comfortable asking others to do the same. Is it realistic to expect others to do something that you are not willing to do yourself?

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Board members who cite time as their gift are in a good position to ask others for time. Time does not pay staff, utilities or the other hard expenses required to operate the organization. An individual who gives time is a volunteer. An individual who gives money is a donor. A board member must be both a volunteer and a donor.

Volunteers can make excellent fundraisers not only because of their knowledge of the organization, but also because of their relatively pure motivations. The success of their nonprofit benefits them no more than any other shareholder (member of the community). With respect to fundraising, board members are a special type of volunteer, holding responsibility for the conduct of the organization. While volunteers may have passion and feel ownership, they cannot be held accountable for the direction of their nonprofits.

Staff can support, manage and thereby leverage volunteer efforts. Because key staff are familiar with the day-to-day operations and details of their organization's program, they make excellent partners in the fundraising process. A passionate board member and a knowledgeable staff member are rarely faced with a question they cannot answer.

A board that is well prepared and passionate about the mission of the organization is essential to successful fundraising.

Leading by example and reaching out to others in the community to garner support for their organization's goals not only helps secure funding, but also attracts additional volunteers. Ultimately a thriving board that regularly recruits new leadership will maintain the strength of the organization.

### **Key takeaways from work session**

How do we as commissioners feel about a larger role in advocacy and fundraising?

- When each of the ICfL commissioners were appointed, there was a different Director at the ICfL.
- Stephanie is asking the current commissioners to reconsider their role in advocacy, and to consider other models with regard to fundraising.
- Most commissioners feel comfortable raising funds.
- There is confusion about what they would be raising money for, and concern that funds raised would be safe from legislative reach.
- There needs to be additional conversation regarding how ICfL would raise funds - internal staffing, a separate restricted fund, and a stand-alone foundation.

**Next steps**

- Commissioners to continue discussion regarding the role or roles they will take regarding advocacy and fundraising for the ICfL.
- Based on these discussions, decisions will be made regarding what advocacy and/or fundraising projects the Commissioners will be responsible for.
- ICfL staff will create a communication plan for the entire organization, and conduct communication training for the ICfL Commissioners. This communication plan will detail how to use stories in advocacy and/or fundraising initiatives.
- Stephanie will compile all stories shared at work session - origin, personal stories (why you applied to be a Commissioner), how ICfL solves a problem, how ICfL overcomes adversity, and a hero story - into a story bank for Commissioners to share when engaging with the community.
- ICfL staff to collect anecdotal information as to how libraries are serving committees; Commissioners can then better share with community members what the ICfL does.
- Define expectations and roles when speaking, what "hat" is the commissioner wearing? Commissioner? Community member? Volunteer?
- All commissioners know mission statement by heart.
- Creation of fund development plans and tools (if fundraising is determined to be a part of ICfL and ICfL Commissioner's role).