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How to Turn Board Members into Ambassadors

FOR YOUR CAUSE

Related Cause Clarity topics:

- How to create a core message
- How to maximize your current donors
- How to attract new donors

This worksheet is a complementary guide to help you put into practice the advice found in our "How to Turn Board Members into Ambassadors for Your Cause" video. Each 3-minute video is packed with information and is designed to be watched multiple times—even while you are completing this worksheet.

WHAT Prepare board members to comfortably talk about your cause, why they care about it and why others should too

TIME REQUIRED 10 hours of development and ongoing training and follow-up

WHO IS INVOLVED This process is best completed by the communications staff.

Board members can be powerful resources to advance your cause, helping forge new connections, raise funds and increase credibility with particular audiences. To turn your board members into effective ambassadors for your cause, you have to give them tools and a shared game plan.

This worksheet walks you through three steps that help you develop confident ambassadors for your cause.

1. **Create resources for your board**
2. **Train the board members**
3. **Map out a plan of how they can support your cause**

Here is a list of what you will have when you complete the steps:

Create resources for your board: Core message talking points for board member, a one-sheet that summarizes your cause and its impact easily emailed or printed, and a board card.

Train the board members: An activity to conduct with your board to practice talking about your cause and a Civic Power Grid activity.

Map out a plan of how they can support your cause: Tools to engage board members in planning their assistance: Your Personal Network list, Board Member Resource Sheet.

For more help, contact Hershey Cause Communications at ***CauseClarity@HersheyCause.com*** or visit ***CauseClarity.org*** to see other How-To's.

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Completing the following steps will provide you with the tools needed for board members to be comfortable and prepared with a strategic plan on how they can help.

1. Create resources for your board:

Creating the right tools provides your board members with the equipment they need to do their job well. Tailor the resources to suit your board members and their most common situations. Below are instructions for several different resources that can be part of the kit provided to your board members. Develop versions of the materials that are the best fit for YOUR board. You will find examples in the Extras *section at the end of the worksheets.*

Resource Activity: Board Card

Use your core message to create a board card that members can carry in their pocket, wallet or purse. The small card contains the key points so that board members can refresh their memory about top messages when they are out and about. Clients have laminated these cards for board members and created cardstock versions that can be handed out by board members. Board cards should include no more than 200 words total to ensure they are easy reference ready. Please see an example in the *Extras* section at the end of the worksheet.

Resource Activity One-Sheet Summary

A one-sheet is a promotional piece where you present your cause in a way that will get people's attention, will get them interested in you and will get them to move on your call to action. Include the following elements:

- **Who you are/mission:** Include a brief on what your organization does. Try to avoid overdoing the history and focus on what is happening now.
- **Summary of programs:** Outline categories or top programs you offer. Remember to highlight the benefits, not the operational details.
- **Summary of impact:** Include who you serve and how many or other key metrics that explain why your work matters.
- **Testimonials or quotes from donors**, members, clients, volunteers.
- **Ways to get involved:** Let people know how they can help your organization accomplish its mission whether it's donating, volunteering, or partnering.
- **Contact information:** Include names, email addresses, mailing address and website.

**Note: One-sheets are most successful when professionally designed, but can be laid out as a fact sheet in a word processing program in a pinch.*

Resource Activity Reference Sheet

Use our "How to Create a Core Message" worksheet to create talking points that board members can hang near their phone at the office.

2. Train the board members:

Now that you have resources to provide to board members, devoting time specifically to refresh the memories of your board members on the programs and impact is essential to get them used. Role-play potential talking points and complete a Civic Power Grid to document where existing connections of the board and staff exist and where there are gaps to cultivate. Below are a few activities that can be done in approximately 45 minutes with board members. Reserve time at a board meeting or set up a time for the training, framing it within the context of how the board's assistance fits into the strategic priorities of the cause (e.g. fundraising goals, partnerships, or reaching new demographics or industries/sectors).

Kick off Activity: "Why do you personally care about our cause/organization?"

Have board members briefly introduce themselves to a partner and then share what they would say if someone asked them why they cared enough to serve on this board. Ask them to consider: What speaks to them about your cause? Why did they join the board initially? After a few minutes, have them switch partners until they have practiced sharing their response with at least four other board members. After 20-25 minutes, lead a group discussion about the experience (e.g., Was it easy or difficult? What did you say that got a response? What did you learn from other board members?).

Prioritization Activity: Assessing Your Civic Power Grid

The crucial skill of civic reach is "what distinguishes a great board member from a merely adequate one, a world-class nonprofit from one that is simply functioning," argues Community Partners CEO Paul Vandeventer. Assessing your civic power is best conducted as a group activity to get input from all board and staff and creates a useful picture of existing connections and areas for development that can inform the individual board member plans in step 3.

Fill in the Civic Power Grid diagram (found in the *Extras* section) as a team with the board. Work through the various sectors asking the group to list specific people or organizations that they know and think fit within each zone.

- Zone 1 is for personal connections of board members or staff
- Zone 2 is for connections that "Will call us back if we call because the contact is known to us"
- Zone 3 is for connections that "We know, but they may not know us"

Review the grid and reflect on the individuals or organizations that will be useful for follow up or outreach by board members or areas where connections need to be developed based on the your goals. Close out by telling board members that you will be following up with brief meetings/calls to work individually with them on how they think they can be helpful in addressing the priorities in the next year.

**Note: Civic Power Grid can be found in the Extras at the end of the worksheet.*

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3. Map out a plan of how each board member can support your cause:

Your board has discussed the overall strengths and needs identified on the Civic Power Grid. Now it is time have clear goals and expectations for each board member.

A. Set up 30-minute meetings or calls with each board member individually to discuss and plan how they can help.

B. Based on the training conducted and specific fundraising and programmatic goals identified, ask each board member to take 20 minutes to complete a Personal Network List and Resource Sheet (found in the Extras section) on their own and bring it with them or send it to you in advance of your conversation. The Personal Network list is designed as a personal exercise to inspire thinking that will help complete the Resource Sheet. The board members can keep it confidential for themselves or share it.

C. Think about the specific needs each board member could assist with based on their connections, skills and expertise. During the one-on-one, review the actions on the Resource Sheet each board member has drafted and discuss how any other priorities you have identified not listed might also be included or achieved. Agree to a list that works for both the cause and the board member.

D. Schedule periodic check-ins via email, in board reports or as a brief portion of board meetings to keep tabs on progress. Celebrate successes and annually have a briefing on key learnings from the year.

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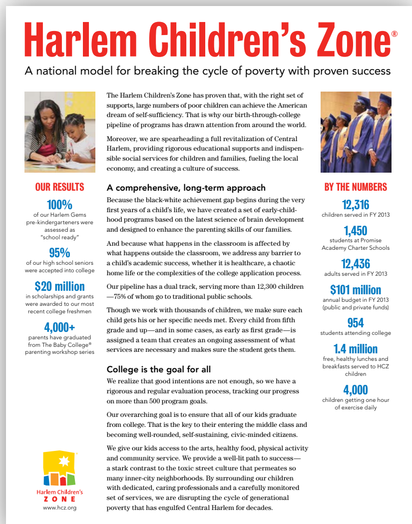
Resource Materials

One-Sheet

Example of a one-sheet from the Harlem Children's Zone can be found at: www.bit.ly/HCZsample

Civic Power Grid

See below:



Harlem Children's Zone®

A national model for breaking the cycle of poverty with proven success

The Harlem Children's Zone has proven that, with the right set of supports, large numbers of poor children can achieve the American dream of self-sufficiency. That is why our birth-through-college pipeline of programs has drawn attention from around the world.

Moreover, we are spearheading a full revitalization of Central Harlem, providing rigorous educational supports and indispensible social services for children and families, fueling the local economy, and creating a culture of success.

OUR RESULTS

100% of our Harlem Gems pre-kindergarteners were assessed as "school ready"

95% of our high school seniors were accepted into college

$20 million in scholarships and grants were awarded to our most recent college freshmen

4,000+ parents have graduated from The Baby College® parenting workshop series

A comprehensive, long-term approach

Because the black-white achievement gap begins during the very first years of a child's life, we have created a set of early-childhood programs based on the latest science of brain development and designed to enhance the parenting skills of our families.

And because what happens in the classroom is affected by what happens outside the classroom, we address any barrier to a child's academic success, whether it is healthcare, a chaotic home life or the complexities of the college application process.

Our pipeline has a dual track, serving more than 12,300 children —75% of whom go to traditional public schools.

Though we work with thousands of children, we make sure each child gets his or her specific needs met. Every child from fifth grade and up—and in some cases, as early as first grade—is assigned a team that creates an ongoing assessment of what services are necessary and makes sure the student gets them.

College is the goal for all

We realize that good intentions are not enough, so we have a rigorous and regular evaluation process, tracking our progress on more than 500 program goals.

Our overarching goal is to ensure that all of our kids graduate from college. That is the key to their entering the middle class and becoming well-rounded, self-sustaining, civic-minded citizens.

We give our kids access to the arts, healthy food, physical activity and community service. We provide a well-lit path to success—a stark contrast to the toxic street culture that permeates so many inner-city neighborhoods. By surrounding our children with dedicated, caring professionals and a carefully monitored set of services, we are disrupting the cycle of generational poverty that has engulfed Central Harlem for decades.

BY THE NUMBERS

12,316 children served in FY 2013

1,450 students at Promise Academy Charter Schools

12,436 adults served in FY 2013

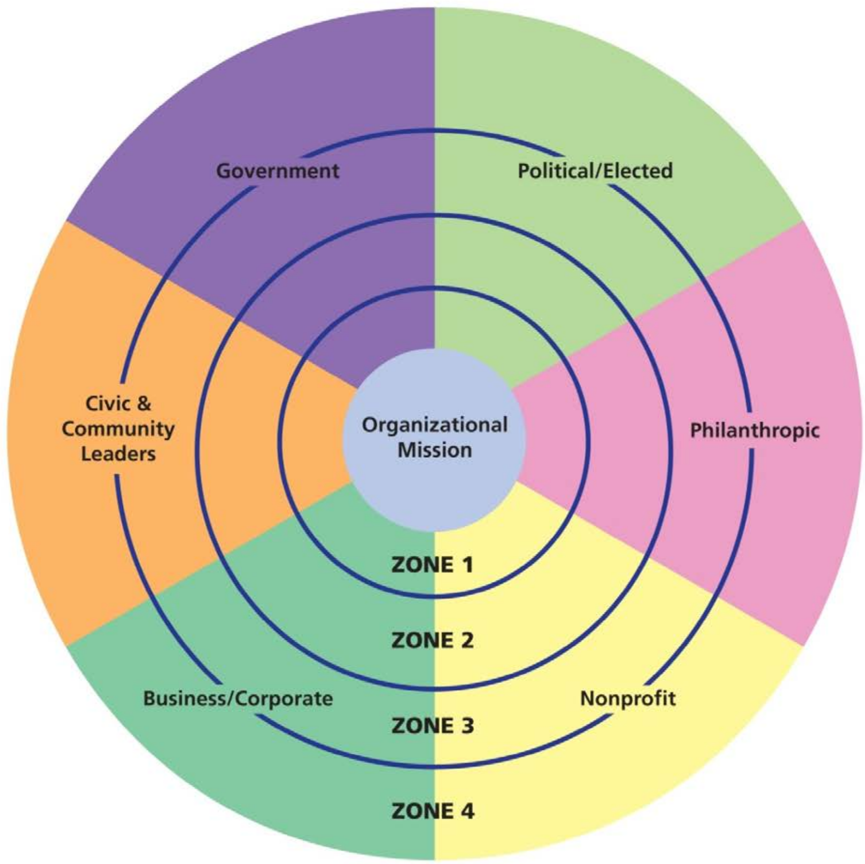
$101 million annual budget in FY 2013 (public and private funds)

954 students attending college

1.4 million free, healthy lunches and breakfasts served to HCZ children

4,000 children getting one hour of exercise daily

Harlem Children's ZONE
www.hcz.org



For more you can read the article by Paul Vandeventer in Stanford Social Innovation Review, Spring 2011. www.SSIReview.org/Articles/Entry/Increasing_Civic_Reach

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Your Personal Network List

Think about your network of friends, relatives and business associates. These could be folks you have met through social activities, work, volunteer activities, sports and recreation, your kids, family, school, church, neighbors, etc.

List the names of people who meet the following criteria:

1. They actually like you or at least respect you.
2. You are reasonably sure they have disposable income and are not living hand-to-mouth.
3. There is some linkage to your organization.

You will not share this list, it's private. **This is not a list of people you will ask for money.**

Names:

Source: Annenberg Alchemy Trainings conducted by Loring, Sternberg & Associates

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→ BONUS

Board Members as Ambassadors: Resources I Can Contribute and How I Can Help

Your Name: ______________________ Date: ______________________

Actions I will take during the coming year that will make a positive impact in helping my organization meet its fundraising and strategic goals:

Example	**Action:** Develop connections and foster relationships with financial firms in the region	**Immediate next step:** Provide introduction to appropriate contact at ABC finance company.	**Resources needed:** One shelter	**Completion date:** Will complete by 9/1
	Action #1:	**Immediate next step:**	**Resources needed:**	**Completion date:**
	Action #2:	**Immediate next step:**	**Resources needed:**	**Completion date:**
	Action #3:	**Immediate next step:**	**Resources needed:**	**Completion date:**
	Action #4:	**Immediate next step:**	**Resources needed:**	**Completion date:**

Activity modified from Annenberg Alchemy training conducted by Loring, Sternberg & Associates