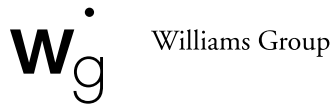


Reaching Out

*Board Ambassadors for Growth
in Community Foundations*



All community foundations do good.

Some do better by making full use of board members as ambassadors for growth.

It happens through the right:

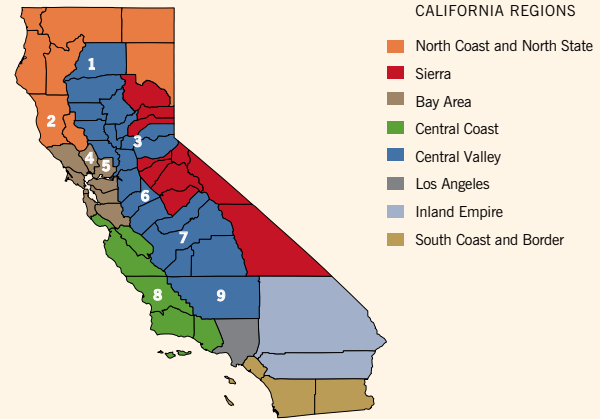
- EXPECTATIONS
- EDUCATION
- EQUIPMENT
- EXPERIENCES
- ENVIRONMENT

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PROJECT PARTICIPANTS

The model and approaches presented in this paper have been developed in conjunction with the nine original participants in The James Irvine Foundation *Community Foundations Initiative II*, as well as from insights generated through engagement of field members across the United States.



Community Foundations Initiative II Sites

- 1 Shasta Regional Community Foundation
Redding, California
- 2 The Community Foundation of Mendocino County
Ukiah, California
- 3 Placer Community Foundation
Auburn, California
- 4 Napa Valley Community Foundation
Napa, California
- 5 Solano Community Foundation
Fairfield, California
- 6 Stanislaus Community Foundation
Modesto, California
- 7 Fresno Regional Foundation
Fresno, California
- 8 San Luis Obispo County Community Foundation
San Luis Obispo, California
- 9 Kern Community Foundation
Bakersfield, California

Additional Inputs

Leaders of the following community foundations vetted this paper and contributed inputs prior to publication.

- Ann Arbor Area Community Foundation (MI)
- Barry Community Foundation (MI)
- Community Foundation for Palm Beach and Martin Counties (FL)
- Community Foundation of Greater Flint (MI)
- Community Foundation of Lorain County (OH)
- Community Foundation of the Lowcountry (SC)
- Greater Everett Community Foundation (WA)
- Heritage Fund — The Community Foundation of Bartholomew County (IN)
- The Community Foundation of the Holland/Zeeland Area (MI)
- Parkersburg Area Community Foundation & Regional Affiliates (WV)
- Community Foundation of Johnson County, Inc. (IA)
- Telluride Foundation (CO)
- Triangle Community Foundation (NC)

Foreword

Throughout California and beyond, community foundations play a critical role in creating more vibrant, inclusive communities. They increase local philanthropic giving, direct charitable resources to the areas of greatest need, and help lead positive change by showcasing the potential of their communities.

Through our *Community Foundations Initiative II*, The James Irvine Foundation has supported a set of emerging community foundations in rural and underresourced regions of California to become more robust local philanthropies, investing \$12 million from 2005 to 2011 to accelerate their growth and leadership potential.

As the initiative concludes, we have learned that community foundations have a significant and often underutilized force for growth at the ready: board members. Board members are often best suited to connect their community foundation to the people who can do the most to deepen its impact and grow its assets. This toolkit highlights pathways for building an active, effective corps of board ambassadors in community foundations. Its content and techniques were developed by Williams Group, a respected community foundation partner, in tandem with the young and growing community foundations in California funded by Irvine.

In publishing this information, we seek to support community foundations and their volunteer board members to increase their organizations' reach and results. Our goal is to see more board members deepen their contribution to their communities by helping more people understand the benefits of improving quality of life through community foundations. We welcome your thoughts and reactions to this report and we look forward to learning how other organizations are using and adapting these tools.



James E. Canales

President and Chief Executive Officer
The James Irvine Foundation
January 2011

Context

Community Foundations Initiative II

The James Irvine Foundation launched its *Community Foundations Initiative II* in 2005. This six-year effort involves a \$12 million investment to accelerate the growth and leadership of a set of small and emerging community foundations in rural areas of California. The initiative provides three types of support:

- Direct grants for core operating support and self-identified projects that build organizational infrastructure
- Regranting funds for Youth or Arts programs to help each community foundation develop capability as a grantmaker
- A strong program of technical assistance as well as a learning community that helps community foundations gain from each other's successes and challenges

Community Foundations Series

This initiative has generated a significant body of knowledge that can benefit the larger field of community foundations, and that holds particular relevance for the youngest and smallest members of the field. This information is captured and shared through the Irvine *Community Foundations Series*.

Visit www.irvine.org/communityfoundations to download these publications



Growing Smarter
Achieving Sustainability
in Emerging Community
Foundations



Reaching Out
Board Ambassadors
for Growth in Community
Foundations



The Four Ps of Marketing
A Road Map to Greater
Visibility for Community
Foundations

Reaching Out: About this paper

Participants in the *Community Foundations Initiative II* understand that board members can contribute mightily to growth in the visibility and assets of their organizations. These community foundations work with five key ingredients to cultivate great board ambassadors. They focus on setting clear *expectations*, providing continuous *education*, developing needed tools and *equipment*, creating positive opportunities and *experiences*, and establishing the right *environment* for success.

This paper presents a description of each of these five ingredients, illuminated with examples and practices drawn from the work of nine California community foundations. It helps users translate this information into action through a set of worksheets tested over the course of the *Community Foundations Initiative II*.

Reaching Out is intended to provide community foundation volunteers and staff with a proven approach accompanied by straightforward tools that can be applied to help build confident, capable and active ambassadors for growth.

Community leaders

Serving on a community foundation board is a one-of-a-kind experience. It involves governing a remarkably complex nonprofit entity, provides a unique vantage point for understanding — and addressing — local needs, and offers an unmatched opportunity to champion community philanthropy.

It's no wonder many board members claim their work at a community foundation to be the most rewarding of their lives.

Those who do the most for their community are those who view themselves as *ambassadors* for their community foundation. They are agents for awareness and creators of connections. These active stewards are ideally positioned to build relationships, visibility and credibility for their organizations — three core ingredients in the recipe for community foundation growth.

Ambassadorship is one of the most important — yet often overlooked — roles of board members. Eliminating a few readily surmountable barriers can help all community foundation trustees thrive as ambassadors who play a vital role in increasing organizational assets and impact.



am·bas·sa·dor, *n.*

Official envoy, diplomatic agent, authorized representative, messenger.

What's in the way?

You may hear board members express barriers by saying things like:

I didn't know it was my job.

I don't know enough about the community foundation.

I don't have anything to use.

I don't know where to go to do this.

I don't know if it matters.

Simple steps to success.

You can bust barriers and grow great ambassadors in these ways:

Set clear **EXPECTATIONS**.

Provide continuous **EDUCATION**.

Develop the right tools and **EQUIPMENT**.

Create positive opportunities and **EXPERIENCES**.

Establish the right **ENVIRONMENT**.

What does it mean to be an ambassador?

An ambassador is a person who helps promote the community foundation in the course of her or his daily activities. Being an ambassador means sharing information, spotting opportunities and spreading the word about community philanthropy. It's a role that any community foundation volunteer — board members, committee members and others — can fill. And it greatly expands the organization's marketing reach.

SUCCESS STORY: NAPA VALLEY COMMUNITY FOUNDATION

NAPA VALLEY COMMUNITY FOUNDATION

Gordon Davies picked up the phone. A retired educator in his late 70s, he thought it was time to call his attorney, Frank Toller, to establish a scholarship fund through his estate plan. Fortunately, both Gordon and Frank knew the Napa Valley Community Foundation was in the scholarship business. In fact, Frank was a founding board member and had remained involved with the organization as it had grown over the years. Frank called the community foundation to gather more information. Frank introduced Gordon to staff of the community foundation, which led to Gordon deciding that a field of interest fund devoted to education would be a better way to meet his objectives. With its extensive knowledge of IRS regulations, solid reputation for honoring donor wishes, and experience with a range of different charitable funds, the community foundation was an easy choice for Frank to recommend to Gordon. Gordon had other options for his estate, but thanks to Frank's connection to the community foundation, Gordon's gift will help future generations of youth in Napa County develop the skills they need to succeed in high school and pursue postsecondary education in college, technical school or vocational training programs.

Expectations

BEING AN AMBASSADOR IS PART OF THE JOB

Community foundation boards are usually loaded with bright stars. It's likely that a board contains recognized leaders — people whose community commitment is admired, and whose opinions are valued.

Recruiting people with personal connections and credibility is a big step in building an ambassador corps. An equally important step is making sure these board members know that being an ambassador for the organization is part of their governance role.

According to Liza Culick, nonprofit governance expert at La Piana Consulting, “A fundamental role of every board member is to ensure that the organization you are governing is financially sound. Being an ambassador is a natural application of this role.”

Five ways to establish expectations

1. **Document the role** of ambassador in the job description for board members. Here's sample language adopted from the Shasta Regional Community Foundation: “Each board member is expected to actively represent the community foundation in the community — bringing the organization into contact with more prospective donors, professional advisors and civic leaders. This is not a *fundraising* responsibility; it is a *friend-raising* opportunity — and most board members find this a highly enjoyable aspect of their involvement with this organization. Staff and veteran board members collaborate in educating, equipping and finding opportunities for new board members to grow into this role.”
2. **State this responsibility** during the recruiting process. Be sure to tell stories of ways that board members make a difference as ambassadors. Share examples of simple actions — making informal introductions to colleagues and friends, working the crowd at community foundation events, participating in grant check presentations — to help board recruits understand the ambassador role (and its contrast to more typical fundraising responsibilities).
3. **Develop collective priorities** for all board members. For example, at a fall meeting the Shasta board decided that in the next calendar year, 100 percent of board members should host or participate in an informal gathering (e.g., an evening reception in the home, a morning coffee at a local restaurant) to introduce new contacts to the community foundation.
4. **Create individual plans** that reflect the unique interests and skills of each board member. Help board members identify practical activities that bring the community foundation in contact with their networks. The worksheet shown on page 19 can help in this regard.
5. **Monitor progress and report status** as you go. Keeping goals and results visible is a critical element in elevating and establishing the importance of the expectations set for your board.

Talking about ambassadorship once a year at a board meeting might make things clear, but it isn't enough to ignite a cadre of community foundation champions. Creating shared expectations is a process, and it works best when it begins early — through candid conversations when recruiting new board members — and is frequently revisited.

Recruiting natural ambassadors

The Placer Community Foundation board's full formula for recruiting star ambassadors includes looking for:

- **Passion** — individuals who love and support their community
- **Connectors** — people who already bring others together
- **Related professions** — the board currently includes a retired judge, community banker and real estate broker
- **Communicators** — those who are comfortable sharing information and engaging with others around new ideas
- **Overachievers** — people who consistently accomplish more than the norm

We look for overachievers in their fields, and people who are already comfortable sharing ideas and information with others.

*Veronica Blake, CEO
Placer Community Foundation*

Every board member should be a donor

Some community foundation boards struggle with whether to expect — or require — board members to be donors. It is important that each board member make a personally significant gift to the community foundation. Board leaders can share this message with their colleagues:

Every donation helps the community foundation generate new impact. It's an intrinsically good thing to do! Plus, when you give as a board member...

- You gain the added credibility you need to interact with any community foundation donor or prospect. You pass the "Have you done what you hope others will do?" test.
- You get a personal story that helps you engage others in the idea of community philanthropy. It's simple and useful to share with others the sentence that starts with "I give to the community foundation because _____."

Of course, not every donor has the same giving capacity. So board members should contribute at whatever level, and in whatever manner (making a gift to the general fund, establishing a donor advised fund, naming the community foundation in an estate plan, etc.) fits their circumstance.

Education

EVERY AMBASSADOR NEEDS ESSENTIAL KNOWLEDGE

Even people who are quick studies find that joining a community foundation board comes with a steep learning curve. And it's easy to see why. These organizations cultivate donors, study community needs, conduct grantmaking, support sophisticated planned giving, manage investment portfolios, engage with multiple players in all sectors and operate within unique accounting practices.

There's a lot to learn. That's why a single orientation is not enough. Most board veterans — and community foundation staff — say it takes two to three years for a new board member to really understand the full breadth of the organization.

Here's the good news: To be strong ambassadors, board members do not have to be experts in all aspects of the community foundation. They do, however, need a solid understanding of its mission and distinct value, especially with regard to the vital ways your organization serves community and community donors.

What's so special about us?

Here is a good group question to ask the board: When it comes to other choices available to donors in our area, what is distinct about the community foundation? In other words, what do we offer that others don't?

This form of interactive learning helps people discover and retain good information to use as ambassadors. It can also generate a powerful list of benefits that inspire board — and staff — to introduce more people to the value of the community foundation.

Board Exercise: Shasta Regional Community Foundation

What's so special about us?

- *We work with lots of groups — we are diverse in our reach*
- *We are a center of knowledge and know the community*
- *We offer local control (compared to other choices for planned giving)*
- *We are an independent, local entity (not an affiliate of a national nonprofit network)*
- *We offer personal attention — we make it easy for donors*
- *We are efficient*
- *Donors can target a specific project or multiple areas of interest*
- *We are flexible*
- *Our focus is donors — we put donors first*
- *We can handle complex and sophisticated gifts*
- *Our turnaround is quick*
- *We promote giving/philanthropy*
- *We have a history and credibility in the community*
- *We are permanent/endowed*
- *We are transparent*
- *We have a well-respected board*

Three ways to educate board members

- 1. Paint the big picture.** Orient all board members with the presentation titled *What is a community foundation?* This overview, available through the National Marketing Action Team, is considered “Community Foundations 101” in a curriculum for board development. It packs a wealth of information into a relatively short presentation, and has been used throughout the United States to establish the basics.
- 2. Describe the audiences.** Help board members understand key external audiences: professional advisors, high net worth donors and nonprofit leaders. Share stories of how the community foundation interacts with members of each group — describe what each group is looking for from your organization, the value you offer each and the messages you use to help signal this value.
- 3. Get specific.** Spend time sharing and discussing key services or offerings of the community foundation. Here are six excellent resources to start with:

About our community foundation Case statement



What is a case statement? When you create a charitable fund through your community foundation, you have an opportunity to reach the community through your personal endowment. Your gift is invested and then, starting from your fund, we will make periodic advances to your community needs. Your gift—used all of these savings from your gift—is a permanent source of community capital, helping do good work today and in the future.

Legacy and stability. Donors who make their gifts can make a difference in their communities. The legacy and stability of the fund you establish can be a source of help for the community. This fund can be used to support the needs of the community in the future.

Support help. When donors support organizations that help the community, we can help them to support the needs of the community. We can help them to support the needs of the community in the future.

A legacy of giving Endowment

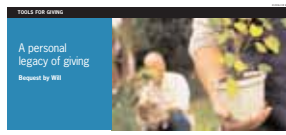


What is an endowment? When you create a charitable fund through your community foundation, you have an opportunity to reach the community through your personal endowment. Your gift is invested and then, starting from your fund, we will make periodic advances to your community needs. Your gift—used all of these savings from your gift—is a permanent source of community capital, helping do good work today and in the future.

Legacy and stability. Donors who make their gifts can make a difference in their communities. The legacy and stability of the fund you establish can be a source of help for the community. This fund can be used to support the needs of the community in the future.

Support help. When donors support organizations that help the community, we can help them to support the needs of the community. We can help them to support the needs of the community in the future.

A personal legacy of giving Bequest



What is a bequest? When you create a charitable fund through your community foundation, you have an opportunity to reach the community through your personal bequest. Your gift is invested and then, starting from your fund, we will make periodic advances to your community needs. Your gift—used all of these savings from your gift—is a permanent source of community capital, helping do good work today and in the future.

Legacy and stability. Donors who make their gifts can make a difference in their communities. The legacy and stability of the fund you establish can be a source of help for the community. This fund can be used to support the needs of the community in the future.

Support help. When donors support organizations that help the community, we can help them to support the needs of the community. We can help them to support the needs of the community in the future.

A charitable gift unearthed Real estate



What is a charitable gift unearthed? When you create a charitable fund through your community foundation, you have an opportunity to reach the community through your personal gift unearthed. Your gift is invested and then, starting from your fund, we will make periodic advances to your community needs. Your gift—used all of these savings from your gift—is a permanent source of community capital, helping do good work today and in the future.

Legacy and stability. Donors who make their gifts can make a difference in their communities. The legacy and stability of the fund you establish can be a source of help for the community. This fund can be used to support the needs of the community in the future.

Support help. When donors support organizations that help the community, we can help them to support the needs of the community. We can help them to support the needs of the community in the future.

A personal approach to giving Donor advised fund



What is a donor advised fund? When you create a charitable fund through your community foundation, you have an opportunity to reach the community through your personal donor advised fund. Your gift is invested and then, starting from your fund, we will make periodic advances to your community needs. Your gift—used all of these savings from your gift—is a permanent source of community capital, helping do good work today and in the future.

Legacy and stability. Donors who make their gifts can make a difference in their communities. The legacy and stability of the fund you establish can be a source of help for the community. This fund can be used to support the needs of the community in the future.

Support help. When donors support organizations that help the community, we can help them to support the needs of the community. We can help them to support the needs of the community in the future.

Deciding to give Helping donors shape their philanthropy



What is a decision to give? When you create a charitable fund through your community foundation, you have an opportunity to reach the community through your personal decision to give. Your gift is invested and then, starting from your fund, we will make periodic advances to your community needs. Your gift—used all of these savings from your gift—is a permanent source of community capital, helping do good work today and in the future.

Legacy and stability. Donors who make their gifts can make a difference in their communities. The legacy and stability of the fund you establish can be a source of help for the community. This fund can be used to support the needs of the community in the future.

Support help. When donors support organizations that help the community, we can help them to support the needs of the community. We can help them to support the needs of the community in the future.

Tip: Create a board education plan by looking at your board meeting calendar, and identify a schedule for delivering some or all of the content referenced on this page — tailored to your community foundation. All tools referenced here were generated by the National Marketing Action Team (NMAT) and are available at www.cfmarketplace.org through the Council on Foundations.

Equipment

TOOLS OF THE TRADE FOR AMBASSADORS

Board members want messages they can use, and materials they can share, to facilitate their conversations. And while community foundations may be complex, ambassadors don't need complicated tools to be credible. The next page includes a set of popular tools in use by ambassadors.

Of course, effective use of tools begins with helping board members get comfortable with the idea of making new connections for the community foundation.

It's not about traditional fundraising. Really.

Most board members are familiar with the notion that being on a nonprofit board involves asking others for money. There are two big differences that explain why this is not the case with a community foundation.

First, it's about fit with donor interests. Nonprofits solicit gifts to advance the organization's operations. Community foundations build relationships to advance each individual donor's philanthropy. That's why community foundations need ambassadors who want to understand people's passions and vision for their communities, more so than fundraisers with the ability to sell a new giving opportunity.

Second, success is measured over time, not via a single transaction. A donor's initial gift to the community foundation is often the first step in a long relationship. Similarly, a board member's first mention of the community foundation should be seen as the beginning of a long-term conversation about community philanthropy, personal legacy and local needs.

Board Exercise: Kern Community Foundation

Role play

Kern Community Foundation's board took time at a retreat to practice their ambassador roles through a peer-learning exercise. It involved a role play in which:

The full board was split into groups of three.

1. The first person in each group played a foundation ambassador, and named a professional advisor whom s/he knew
2. The second person played this advisor
3. The third person observed

The first person's goal was to secure a meeting between this advisor and the community foundation CEO. S/he would pursue this goal by briefly introducing two things:

- A. The community foundation (i.e., what it is)
- B. The reason the advisor should be interested in learning more through a meeting (i.e., the benefits the advisor would gain by being introduced to the CEO)

The second person's job was to raise an objection to the idea of the meeting (e.g., I'm really busy, I can't advocate for a charity in my work).

The first person's final task was to overcome the objection.

The group then shifted roles and repeated the exercise two more times — so that each party got to be in the role of board ambassador, advisor and observer. The large group then discussed the experience and reflected on what it learned.

Total time: 45 minutes (with just three to four minutes for each individual role-play round)

Popular tools

Business cards. Some community foundations print business cards for their board members; others give board members a supply of the executive’s card to hand out. Either approach works — carrying business cards provides a continual reminder that “I am a community foundation ambassador,” and supplies an easy means for making introductions.

Nametags. Invest in durable nametags that include the community foundation logo, board member name and board title, such as chair, trustee or director. These identifiers can be used by ambassadors at community foundation events and in other local venues as appropriate (e.g., chamber of commerce meetings, Rotary Club events, nonprofit association convenings, etc.)

Overview. Whether it’s a one-page “About our community foundation” document or a simple three-panel brochure, a general overview piece can help support conversations about community philanthropy. One board member at Shasta Regional Community Foundation requested a three-panel brochure that he could carry in his jacket pocket, so he’s always prepared for impromptu conversations.

Professional advisor handout. This tool helps advisors assess the philanthropic goals of their clients. It can be shared by each community foundation board member with his or her personal professional advisors. The introduction can be as simple as, “Did you know I am serving on the community foundation board? Well, we’ve recently created a tool for legal and financial advisors to use with their clients... could I send you a copy? I’d love to get your feedback on it.”

Legacy brochure. A simple brochure can make it easy to share the concept and the opportunity for making a bequest to the community foundation. Setting a goal for legacy society membership (e.g., 10 new members this year) may actually make it easier for board members to introduce the topic to friends and associates. Two things are especially good for ambassadors to know here. One: Many people without children choose to preserve their family name and their estate through the community foundation. Two: People with children often choose to set aside a small percentage of their estate for a permanent legacy that will serve as an example for children and grandchildren for generations to come.

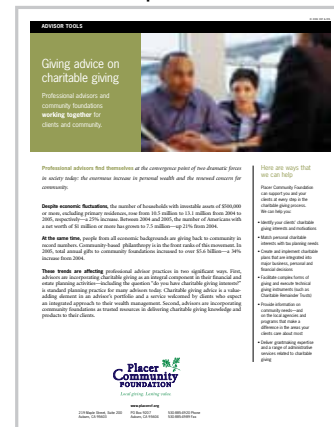
Specialized publications. There may be a particular area of giving or philanthropic focus in your region that lends itself to ambassador communications. For example, in communities that are land rich, a simple brochure that outlines the benefits of giving real estate to the community foundation can be an effective tool to share with attorneys, real estate professionals and donors.

Website and online communications. The community foundation website can be a highly effective tool for board ambassadorship. Alert board members when new information, materials and stories are posted. Provide them with sample copy they can use to forward a link to their online network.

Good ideas

Community foundations make use of a range of communications tools to support their board ambassadors at work.

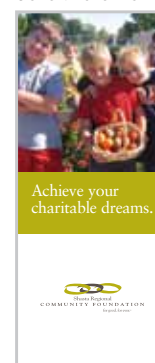
Introduction for professional advisors



Website



General overview for donors



CASE STUDY: PLACER COMMUNITY FOUNDATION



Tucked into a hillside in the “Old Town” section of Auburn, California, a century-old Victorian building is home to Placer Community Foundation, formerly known as the Auburn Community Foundation. The foundation changed names when it transitioned from a community-minded private foundation to a full-fledged community foundation in 2005.

With that change, the board hired Veronica Blake as the foundation’s first chief executive officer. As Blake and her board learned the ropes of operating a community foundation together, they forged strong relationships quickly. Board members had awarded grants year after year as private foundation trustees, but had never tried to attract gifts. As a group, they were eager to test a new approach to board ambassadorship generated with consulting support from The James Irvine Foundation.

Through a workshop in which board members completed a personal assessment, Blake confirmed that every individual brought distinct skills and networks to the table. Each was uniquely suited to different ambassador responsibilities. To create action plans, Blake met one-on-one with board members to learn more about their interests, resulting in individual plans that are complementary and collectively serve the community foundation most effectively.

My plan for the second quarter

1. *Identify ten prospects and provide names, addresses and introductions to the community foundation*
2. *Attend one community event on behalf of the foundation*

Making commitments: Individual action plan example

A related step was developing a system to measure success. Board member Jeff Birkholz took the lead here, helping devise a dashboard of key indicators to track activities and measure progress, featuring columns for goals and a section to monitor board development. “The dashboard has become the tool we use to manage board development work,” said Blake. “It’s simple, efficient and direct. I present the numbers and facilitate the conversation; the board members take over from there — they like to talk about what they are doing and learning, and about how as a group we can find ways to do better.”

ACTIVITY	GOAL FOR YEAR	ACTUAL TO DATE
Introduce new donor prospects to the community foundation	<i>100</i>	<i>53</i>
Introduce new professional advisors to the community foundation	<i>40</i>	<i>26</i>
Conduct grant check presentations	<i>10</i>	<i>10</i>

Charting success: Tracking and reporting progress example

Blake makes a point of putting time into maintaining contact and encouraging board follow-through on the commitments established in each personal plan. “It’s rare that I am not on the phone or in a meeting with every board member at least once a week,” she says. It’s an investment that pays dividends. “It helps them — and me — stay motivated and focused.”

See page 17 for more information and worksheets.

Experiences

AMBASSADORS SEEK OPPORTUNITIES TO CONNECT

Greeting an arts patron during intermission at a local performance. Being seated next to an estate planning attorney at a service club luncheon. Chatting in the front yard with a neighbor who sits on the board of a community nonprofit. Talking with a colleague about community issues.

Each of these venues provides a natural opportunity for ambassadors to make their mark. Every ambassador needs opportunities to represent the community foundation. Settings such as the above are ready-made and simply require the ambassador to be alert to the moment to mention the community foundation and its relationship to the audience member's interests.

Other opportunities can be more intentionally structured — to help board members gain access to new experiences that advance their contributions as ambassadors.

Get on site

Beth Freeman, director of grants and programs at Shasta Regional Community Foundation, issued an invite to all board members to participate in site visits she conducts at local nonprofit organizations. “It’s a great way for our ambassadors to learn first-hand about community issues, and about our community foundation’s role in supporting local programs that address these issues.”

An extension of this idea involves grouping board members and other stakeholders to tour local nonprofits. In this scenario, board ambassadors might join with donors and professional advisors to learn together by visiting two or three grantees addressing a common interest area — such as youth development or community arts. The tour might last a few hours, and be followed by an informal lunch or late-afternoon debrief in which participants exchange perspectives about their experiences.



Photo opportunities

At each community foundation event, have a photographer on hand to capture people in small groups. Include board ambassadors in as many photos as possible. Following the event, send prints of photos to attendees along with a handwritten note. Ask board ambassadors to pen some of these notes.

Seven ways ambassadors can connect

1. **Present grant checks.** Ambassadors can attend meetings of the nonprofit boards funded by your community foundation in order to present the grant check and say a few words about the community foundation, its unique role in the community and its ability to partner with donors in supporting needed nonprofits and programs.
2. **Lead table talk.** Your community foundation can host a luncheon on family philanthropy or another highly relevant topic, with a featured speaker. Involve board members in inviting current and prospective donors. Distribute board members among tables at the event, with each prepared to lead an informal discussion of the community foundation over lunch.
3. **Break bread.** Invite one or two professional advisors to have lunch with the community foundation CEO, along with one or two board members, to share information and ideas on community philanthropy.
4. **Work the crowd.** Arrange for a staff member to be guest speaker at a local Rotary or business club meeting, and make sure all board members associated with the organization are on hand — wearing their ambassador hats and making introductions on behalf of the community foundation.
5. **Host your network.** Make it easy for board members to sponsor informal receptions for their friends and colleagues — at home, in the office or in a coffee shop. The ambassador makes the invite and hosts the event, simply sharing the story of why s/he supports the community foundation. Staff leaders do the rest — providing an overview of the organization and facilitating discussion.
6. **Do something special.** For example, Judi McCarthy, board chair at Kern Community Foundation, orchestrated an event supporting the organization's Women and Girls Fund, and featuring the release of alarming research findings indicating that girls in the region were far less likely to graduate from high school than boys. This event attracted significant media — and donor — attention.
7. **Cover the circuit.** Most community foundations find that staff members are invited to attend far more local events than fit on their calendars. Board ambassadors can cover the events that would otherwise go unattended by a community foundation representative. Just wear the nametag and mingle — community foundation people are always welcome at these gatherings.

Environment

AMBASSADORS WANT A CULTURE OF SUPPORT AND ACCOUNTABILITY

Policies and action plans alone won't cause ambassadors to soar. Culture — the environmental intangibles — can spell the difference between mediocrity and magnificence.

In a weak culture, the board conversation about ambassadors can be a non-starter. In the right culture, this discussion can motivate greater levels of commitment — and fulfillment — among all board members. Success skyrockets when the ambassador work becomes part of the fabric of the organization, and when the ambassador concept takes root in the identity of each individual board member.

The right environment will cultivate ambassadors, reinforce their role, reward their accomplishments and encourage their growth. And while everyone has ownership for the culture of the organization, this is definitely an arena in which leadership at the top matters — the community foundation chief executive and board chair are tone makers here.

Putting board members in the spotlight

What's the most surefire way to increase your board ambassadorship overnight? Start featuring board members, as ambassadors, in public venues and vehicles. Introduce them at community foundation events. Get their pictures, good works and testimonials on your website, in publications and in the news. Place them center stage whenever possible.

Checklist

- Display board member photos in community foundation offices.
- Highlight board members on the community foundation website. Kern Community Foundation website features board member photos and quotes on virtually every page (www.kernfoundation.org).
- Have at least two photos in use for each board member — the obligatory portrait for official use, and a more informal image of the ambassador in action at a community event or with a community group.
- Quote board members in news releases and media placements. One might write an op-ed piece about local philanthropy, another might do a radio show, another might participate in an interview regarding a pressing community issue.
- Feature a board member profile in each newsletter or publication.

The savvy executive's guide to creating an environment of excellence

- **Set a great example.** Be an outstanding ambassador yourself. Seek connections and make introductions throughout the community, and be visibly proud to represent your organization with all stakeholder groups.
- **Stay in touch.** Veronica Blake, CEO at Placer Community Foundation, has a Friday list. Each Friday, she checks to see how many of her board members she's talked with that week. And then she calls the ones not yet contacted, just to check in.
- **Put ambassadors first.** Whether you have a large staff or you're a one-person shop, think of your board members as your first string. Send them out first — to present grant checks, meet with advisors, talk to donors — wherever it's appropriate and whenever they are available. Or, take one or more along to tag-team opportunities and give others a chance to develop their skills and confidence.
- **Give thanks.** Call and thank each board member for every positive action, no matter how small. "Sara Mason mentioned that you saw her at the Lion's Club and talked up our scholarship program. Thanks for sharing that with her." And be sure to follow up when an ambassador action turns into a community foundation result down the road ("Remember your conversation with Sara Mason at the Lion's Club — her attorney called me this week to find out how our scholarship program works, and to see if we might be able to set up a fund in her name.").
- **Bring meaning to meetings.** Make sure ambassador work is integrated into each board meeting. Find the right balance of formal education (e.g., learning more about donor advised funds), development of ambassador skills (e.g., role plays, storytelling), peer learning (e.g., sharing experiences and lessons from recent experiences), and recognition of actions completed and results achieved.
- **Promote progress.** Include a review of board activities and statistics at meetings too. Report by percentages, not by name, so as not to embarrass individuals; e.g., "We're at 93 percent for board giving, 81 percent for board members who have visited a nonprofit this year." Make this data accessible anytime via board intranets or other vehicles.
- **Celebrate success.** It's a big deal when board members — individually and collectively — help your community foundation grow. Make sure everyone is aware of results-generating actions, as well as completed steps in the journey of progress, that were taken by your ambassadors.

WORDS OF WISDOM

Every ambassador can make a difference for the community, inspiring others by example and connecting donors to new ways of giving.

SUSANNE NORGARD, EXECUTIVE DIRECTOR
THE COMMUNITY FOUNDATION OF MENDOCINO COUNTY



Going to work

This section provides tools to help your community foundation get the most from its board ambassadors.

INDIVIDUAL ASSESSMENT

Take Stock.

What is the current comfort level of your community foundation's board members to undertake aspects of ambassador work? Distribute this individual assessment in a board meeting and ask members to complete this worksheet, then discuss their responses and reflect on how these responses might inform your ambassador program.

INDIVIDUAL ACTION PLAN

Think It Through.

What are the right activities for each community foundation board member — based on interests, level of experience and availability? Distribute this individual action plan worksheet as the basis for staff and board interaction, leading to each board member developing a personalized ambassador plan.

CHARTING SUCCESS

Report Progress.

What type and amount of board activity is your community foundation emphasizing? Use this worksheet to chart success — helping create visibility and sustain momentum for your ambassador program.

Good resource



The Four Ps of Marketing

Does your community foundation need a marketing roadmap to help further guide and support the work of board ambassadors? Use this resource to help build your plan. It includes tools to support development of core messages for your organization.

Available at www.irvine.org/communityfoundations

Individual assessment

Community foundations are complex organizations providing asset development, strategic grantmaking and financial administration. They offer donors and professional advisors a relatively sophisticated set of products and services: philanthropic advice, gift planning strategies and charitable funds. They appeal to a targeted audience: philanthropic people who want to support their local community.

Because of the complexity and relatively limited marketing resources inherent to community foundations, leveraging personal contacts is critical to growth. In this context, board members are uniquely positioned to accelerate growth in community foundation assets and impact. They can contribute as ambassadors in the communities they represent, sharing community foundation messages and stories with family, colleagues and associates — and “raising friends” for the organization.

ANSWER THE FOLLOWING STATEMENTS TO ASSESS YOUR AMBASSADOR READINESS QUOTIENT:	YES	NO
I think our community foundation has a clear and compelling message.		
I am comfortable delivering this message.		
I am delivering this message.		
I have community foundation business cards.		
I understand the power of community foundation endowment.		
I understand the benefits of unrestricted funds.		
I understand local community needs and issues.		
I would be comfortable making grant check presentations.		
I would be comfortable leading a group discussion about local community needs.		
I have introduced my professional advisor(s) to the community foundation.		
I have personal contacts (friends, family, colleagues) I'd like to introduce to the community foundation.		
I would be comfortable hosting a breakfast or lunch meeting to introduce a personal contact to the executive director.		
I would be comfortable hosting a social gathering for the community foundation at my office, club or association.		
I would be comfortable hosting a social gathering for the community foundation in my home.		
I would be comfortable discussing the benefits of including the community foundation in wills and estate plans.		
I am a donor to the community foundation.		
I am a member of the community foundation legacy society (the community foundation is in my estate plan).		
Other:		

Individual action plan

An engaged board of trustees can make the difference between modest gains and accelerated growth for a community foundation. Use the table below to define the steps you'll make in the coming year to increase your impact as an ambassador for the community foundation.

EXAMPLES:

READING AND LEARNING

1. Learn the community foundation's key messages
2. Read this year's annual report
3. Review new content on the community foundation website

VISITING AND LISTENING

1. Accompany staff on a site visit
2. Make 2-3 grant check presentations
3. Offer to make a presentation at Rotary Club

CONNECTING AND SHARING

1. Introduce CEO to 2 new potential donors
2. Accompany CEO to lunch with a professional advisor
3. Host a donor event

FIRST QUARTER

READING AND LEARNING

1. _____
2. _____
3. _____

VISITING AND LISTENING

1. _____
2. _____
3. _____

CONNECTING AND SHARING

1. _____
2. _____
3. _____

SECOND QUARTER

READING AND LEARNING

1. _____
2. _____
3. _____

VISITING AND LISTENING

1. _____
2. _____
3. _____

CONNECTING AND SHARING

1. _____
2. _____
3. _____

THIRD QUARTER

READING AND LEARNING

1. _____
2. _____
3. _____

VISITING AND LISTENING

1. _____
2. _____
3. _____

CONNECTING AND SHARING

1. _____
2. _____
3. _____

FOURTH QUARTER

READING AND LEARNING

1. _____
2. _____
3. _____

VISITING AND LISTENING

1. _____
2. _____
3. _____

CONNECTING AND SHARING

1. _____
2. _____
3. _____

BOARD MEMBER: _____

DATE: _____

Charting success

A simple scorecard can help your community foundation recognize progress and sustain momentum toward its ambassador goals.

Customize and use this worksheet to keep your activities and achievements visible.

ACTIVITY	GOAL FOR YEAR	ACTUAL TO DATE
Introduce new donor prospects to the community foundation		
Introduce new professional advisors to the community foundation		
Participate in meetings with existing donors		
Conduct grant check presentations		
Lead speaking engagements		
Attend community events		
Host network events		
Attend internal ambassador training		
Share success stories at board meetings		
Other:		

INSIGHT COMMUNITY FOUNDATIONS SERIES: REACHING OUT

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