

# Overview of Charlotte Ballet's Board Roles



## The Situation

“It is hard to train an instinct of philanthropy in your board members. Even if they may have all the right connections and personal wealth to build enticing relationships with donors, they will not be successful in soliciting donations unless they understand the culture of arts philanthropy.”

- Anonymous Arts Organization

*this mindset leads to...*



Instead of putting in the effort to train board members to properly solicit donations, organizations tend to limit board recruitment to those with significant philanthropic experience, resulting in a more homogenous and elitist board.




## What Charlotte Ballet Does

Recognize that board members have diverse strengths and varying levels of philanthropic experiences — utilize these differences to the organization's advantage.

- **Change the Model.** The staff got rid of the assumption that every board member has a requirement to solicit donations. Instead, the staff brainstormed other meaningful ways board members could engage in to grow revenue and saw these tasks as equally contributing to the development team.
- **Be Explicit.** Using Kay Sprinkle Grace's [Ambassadors, Advocates, and Askers \(AAA\) approach](#) which inspires all board member engagement in fundraising, Charlotte Ballet created these 3 roles for its board — each with its own explicit tasks and responsibilities — with a specific role just for soliciting donations.
- **Put the Board Member First.** Knowing that not everyone has the confidence or experience in philanthropy, board members are to self-select themselves into which roles they feel most comfortable taking part in.

# Charlotte Ballet: Ensuring Board Commitment



	Role Description	List of Tasks & Duties
<p><b>AMBASSADOR</b></p> 	<p><b>A role every board member needs to play</b></p> <ul style="list-style-type: none"> <li>➤ Critical role in <b>cultivating</b> prospective donors and <b>stewarding</b> continuing donor-investors</li> <li>➤ Need to be <b>well informed</b> and <b>coached</b> in the messages about his/her impact</li> <li>➤ Master the “<b>elevator speech</b>”</li> <li>➤ A catalyst for donor-investor renewal &amp; <b>special gifts</b></li> </ul> <p><i>[FOR STAFF]: If a board member is not a confident Ambassador, how can we help?</i></p>	<p><b>As an Ambassador, I will:</b></p> <ul style="list-style-type: none"> <li>✓ Identify and cultivate my friends/colleagues who would be interested in supporting our programs and campaigns</li> <li>✓ Host a private cultivation or donor recognition gathering (at home, public venue, or the organization)</li> <li>✓ Take ___# of people to lunch each quarter</li> <li>✓ Invite best prospects to be my guests at appropriate functions, tours, lectures, etc.</li> <li>✓ Steward relationships with donors and prospect via writing notes, hosting donor events, participating in Thank-a-thons, etc.</li> <li>✓ Other: _____</li> </ul>
<p><b>ADVOCATE</b></p> 	<ul style="list-style-type: none"> <li>➤ Volunteer as an Advocate to attain an <b>outcome</b> of some sort</li> <li>➤ Be <b>strategic</b> in sharing information</li> <li>➤ Be a strong <b>board recruiter</b></li> <li>➤ Advocate for the Charlotte Ballet on a <b>more formal basis</b> with the government, partner organization, institutional funder, or potential volunteers</li> <li>➤ Be informed on (1) the case for support and (2) the <b>strategic plan and vision</b></li> <li>➤ Be <b>well coached</b> on the desired result of advocacy and be comfortable with handling objections</li> </ul>	<p><b>As an Advocate, I will:</b></p> <ul style="list-style-type: none"> <li>✓ Represent the organization at public functions as an attendee or as a speaker</li> <li>✓ If asked, become part of a speaker’s bureau</li> <li>✓ Make phone calls to city officials when asked</li> <li>✓ Work with staff to create/engage in strategy plans in order to present the case to donors and prospects</li> <li>✓ Arrange information sessions with your contacts (individual, corporate, or foundations)</li> <li>✓ Other: _____</li> </ul>
<p><b>ASKER</b></p> 	<ul style="list-style-type: none"> <li>➤ <b>Enjoy</b> asking</li> <li>➤ Be well-informed and well-trained</li> <li>➤ You will be “<b>matched</b>” with <b>prospective donors</b> to maximize the possibility of success</li> <li>➤ <b>Teamed</b> up with another board or staff leader</li> <li>➤ Work with the staff to <b>prepare for the solicitation</b></li> <li>➤ Staff will coach and review you on a <b>prospect profile</b></li> <li>➤ Benefit from the work of Ambassadors and Advocates</li> </ul>	<p><b>As an Asker, I will:</b></p> <ul style="list-style-type: none"> <li>✓ Lead or participate in requests to new renewing donors to invest in the organization</li> <li>✓ Generate and sign letters for appointments or gifts</li> <li>✓ Make follow-up phone calls, write solicitation letters, and go on visits</li> <li>✓ Seek sponsorship for special events and promote table purchase by friends/colleagues</li> <li>✓ Other: _____</li> <li>✓ Provide comments or ideas for getting involved: _____</li> </ul>

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## Takeaways from a Role-Defined Board Model

### 1 Set specific expectations for each role, including the minimal expectations

**What this means.** Charlotte Ballet instituted board roles in order to help **set expectations and encourage board engagement**. At minimum, every board member is considered an Ambassador.

**Why it works.** A personal check-list of tasks per role not only helps a board member plan and manage their time but it also sets staff expectation of that board member's performance.

### 2 Leverage your board's personal strengths to get greater engagement

**What this means.** Charlotte Ballet surveyed their board members to discover which roles they were most comfortable participating in, allowing them to self-select their role. The staff then strategized opportunities around that comfort level.

**Why it works.** A **one-sized approach to the board is time-consuming and tiresome** if people are not willing to engage in a certain activity.

### 3 Cultivate peer-to-peer accountability within the board

**What this means.** At board meetings, Charlotte Ballet prioritizes board members to share experiences around completing their role's tasks.

**Why it works.** This creates a social dynamic that pushes peer board members who haven't carried out their tasks to perform as well. A **self-accountability model** also requires less time and energy from the staff in overseeing board engagement.

We find that this strategy is **most effective for small to mid-sized organizations** that have difficulty cultivating ongoing board engagement, especially if the staff already has limited capacity in managing the board. However, even for large organizations with designated staff members who oversee board activity, explicitly defining and categorizing board commitments **sets necessary internal expectations**.

# Bringing Board Roles Into Your Own Team

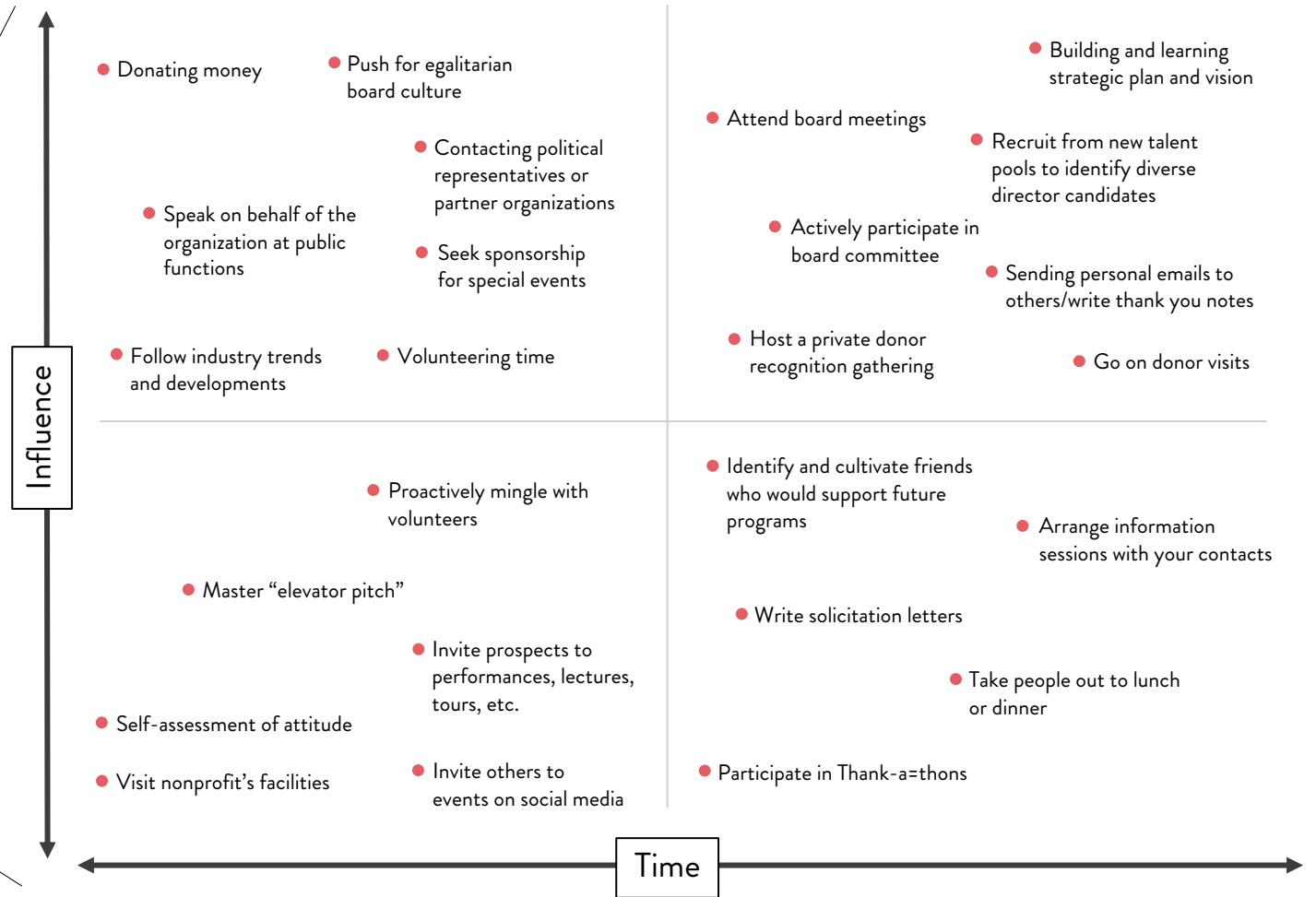
How can my organization similarly define our own board categories?

**Acknowledge Differences:** Recognize that board members come into your organization with different backgrounds and strengths, and intentionally capitalize on these differences.

**Brainstorm Responsibilities:** Be broader and more creative in your definitions of what being a board member looks like, especially when today's *push for more DEI&A* negates some board members of a financial obligation to your organization.

**Organize Tasks:** List all your wanted board responsibilities using tables and other segmentation tactics (example on the right).

**Create Roles:** Using the table on the right, strategize different ways in which you can clump board responsibilities together.



# Out-of-Industry: Ensuring Leadership Engagement



**Becton, Dickinson, and Company  
(BD)**

Integral to BD's formalized staff curriculum *Leaders-As-Teachers* is the notion that an organization's leaders are a key component of a successful learning strategy. The company recognized that not everyone in its leadership staff wanted to teach and brainstormed other equally impactful ways in which they could contribute.

The diagram on the right describes the **5 roles** BD created to highlight the different ways its leaders can contribute to the curriculum.



## A Role-Defined Approach to Leadership *Business Benefits Applicable to the Arts*

- 1 Strengthens the organizational culture and communications by setting clear intentions within the board and staff
- 2 Promotes positive business and organizational change
- 3 Reduces costs by leveraging top talent already in your board and cutting out extraneous staff oversight

*Source: Betof, E. "Leaders As Teachers – Unlock the Teaching Potential of Your Company's Best and Brightest," (2009).*