



IGNITED FUNDRAISING

FUEL TO IGNITE YOUR FUNDRAISING



Mission Possible: *Your Workbook for a Successful Board*



Mission Possible:

Creating an Engaged Nonprofit Board

I'm often asked, "How do we get our board to help us with fundraising?"

My answer is: Not all of your board members should or are able to help you ask for financial gifts.

I actually think you are asking the wrong question.

If you want your board to show up, be educated about your mission, enthused about their duties, talk to others about your organization with passion, share stories about those you serve, invite others to do specific things AND feel great about their board experience, then YOU have to make sure to support them and communicate clearly how they can best serve.

Communication is key to creating a board experience that's interesting, exciting, and enjoyable.

My motto: "It is 100% staff responsibility for board members to be great. AND 100% board responsibility to do what we said we'd do."

There are many, many good resources to help you train, excite, and engage your board. Taking time to add in some professional development training for THEM is as important as it is to add in time to train your staff.

This resource booklet is a gathering of some of my favorite worksheets and templates to help you create an amazing board experience AND cause board engagement all year-long.

I hope you'll use these worksheets and templates over and over again. And, should you find ways to make them even better, feel free to share your version with me!

Lori L. Jacobwith

Chief Fundraising Culture Changer & Master Storyteller

Ignited Fundraising



“How do we get our board to help us with fundraising?”

Board Application Form

1

Candidate Name _____

Mailing Address _____

City _____ State _____ Zip _____

Home Phone _____ Work Phone _____

Email _____

2

Current Position _____

Current Employer _____

3Relevant experience and/or employment (*please attach resumé*).**4**

Please check area(s) of expertise/contribution you feel you can make to further our mission:

 Fundraising Strategic Planning Legislative Contacts Special Events Financial/Accounting Evaluation Capital Campaign Public Policy Advocacy Technology Policy Development Public Relations/Marketing**5**

Please list prior experience serving as a board member for other non-profit organizations:

6 What other volunteer commitments do you currently have?

7 Why are you interested in serving as a board member?

8 Please share any other information you feel important for consideration for your application as a board candidate.

For Board Use

<input type="checkbox"/> Nominee has had a personal meeting with either Executive Director, Board Chair, or other Board member	Date _____
<input type="checkbox"/> Nominee reviewed by the committee	Date _____
<input type="checkbox"/> Nominee proposed to the board	Date _____
<input type="checkbox"/> Board action:	Elected Rejected Date _____

Board Orientation Checklist

First & Last Name _____
Address _____
Email _____
Home Phone _____ Work Phone _____
Mobile _____
Preferred time and method of contact: _____

Describe the Organization to Your New Board Member

We are _____

We specialize in (serving) _____

We help them to (do what?) _____

Board Orientation Process

1. Includes at least one special meeting no longer than 1 hour of “working” time.
2. Is a peer-to-peer meeting with key staff leadership handling brief aspects of organization’s programs, budget and annual fundraising plan.
3. Is held in a location where program services can be observed, if possible.
4. Allows for questions from new board members and “pre-determined” mission immersion: Client guest speaker, short video of client stories, stories shared about clients.
5. Includes personal phone call follow-up from the assigned “Board Buddy” within 3 days of the orientation.
6. Board Buddy provides ongoing contact for as long as needed to ensure a powerful onboarding of information and expectations to and from the new board member.

At a Special Meeting Led by Board Members Clarify and Fully Explain

- Meeting attendance – full board & committee meetings
- Committee structure
- Board role and relationship to administrator/staff leadership
- Mission and vision
- Governance goals
- Fund development expectations
- Annual board agreement

Board Orientation Packet

- Statement of purpose or mission (if developed and adopted by the Board)
- Brief overview of agency programs and services
- Agency annual report with financial statements for the past fiscal year
- Minutes for most recent Board meeting including most recent financial statements and current annual budget
- Current board agreement
- Current board activity dashboard
- List of all Board members' names, addresses, phone numbers, and terms of office
- Committee list with chairperson clearly identified
- Jargon cheat sheet: Glossary of abbreviations and acronyms of programs, referral agencies, fundraising events, etc.

Later or 2nd Meeting

- Personnel policies or brief overview of personnel system. To include: staff organization chart, number of professional and non-professional staff, full-time and part-time staff, and date of last major revision of Personnel Policies
- Policy statement and procedures which have been formally adopted by the Board
- Bylaws
- Board organization chart with committee and sub-committee structure
- Dashboard with easy to read financials and fundraising measures at a glance

First Personal Phone Call With Experienced “Board Buddy”

- Debrief of recent orientation meeting. Identify any unasked questions
- Reminder of upcoming meetings, events, and attendance expectations
- More thorough explanation of upcoming votes or significant board decisions
- Discussion of committee selection based on new board member talents

Ongoing Contact Between “Board Buddy” and New Board Member

- Make sure committee involvement has begun. If not, identify barriers
- Continue to reinforce governance and mission focus
- Ensure board member is feeling utilized and energized by their board service

Board Agreement

Board Member Commitment Form

I recognize our organization's ability to change lives is fueled by our success in raising funds in support of programs and operations. Likewise, as a community volunteer in a leadership role, I acknowledge a personal responsibility to contribute to the causes I support. The assistance that I provide may take varying forms. Regardless of their nature, my contributions will be personally significant.

As a board member of _____, I pledge to the organization and to my fellow directors that I will fulfill the basic board member agreements and additional commitments I have indicated below.

I agree to be supported and held accountable by my fellow directors in fulfilling my agreements.

BASIC BOARD AGREEMENT: I agree to fulfill the following three (3) agreements:

1. Make a financial contribution at a level that is significant to me
2. Serve as a Table Host and recruit others to be a table host for the annual fundraising event
3. Actively participate on a board committee
(_____)
Indicate Committee Name(s)

ADDITIONAL BOARD COMMITMENTS: I agree to fulfill four (4) additional volunteer duties by participation in fund development as noted on the following page.

Please return form to:

Please return this form by: _____

Date

Signature

MAJOR GIFTS

- Make a personal gift (\$5,000 or more)
- Coordinate major gift campaign (gift of \$5000+) directed at 1-2 individuals by year-end
- Accompany Director on 1 solicitation call
- Identify & assist with research about 1 or 2 major individual donor prospects (ongoing)
- Visit 1-2 major donor prospects
- Host an in-home reception for 10-20 donor prospects
- Make a cash/stock/planned gift to the endowment fund

ANNUAL CAMPAIGN

- Make thank you calls to 5 donors per month as needed
- Write acknowledgement notes to 5-10 donors by year-end
- Send annual appeal to 10 personal contacts with a personal note included
- Identify prospects to attend informational sessions
- Serve as table host or recruit table host for annual fundraising event
- Make a personal pledge to join the Giving Circle

FOUNDATION/CORPORATION PROPOSALS

- Identify and research 1-2 Foundation/Corporation prospects (ongoing)
- Assist in writing grant proposals or letters of support for proposals submitted (ongoing)
- Participate in site visits to 1-2 Foundation/Corporation funders, by year-end
- Develop a relationship with 1-2 Foundation/Corporation funding prospects

EVENTS (i.e., [name events here])

- Participate on one event planning sub-committee; duties as assigned
- Obtain one corporate sponsorship, or provide entry to 3-5 corporations for committee/staff visits
- Identify or host 3rd party events (other organizations holding event and contributing proceeds)
- Attend 2 events annually in addition to committee and board meetings

PUBLIC RELATIONS

- Draft one article or personal story for newsletter or annual report
- Participate on Marketing & Public Relations Task Force and/or solicit pro bono media

IN-KIND CONTRIBUTIONS

- Provide or seek in-kind goods & services such as: gift cards, copy paper, postage
- Host a Board or Committee meeting or a Research Reception

Please return form to:

Please return this form by: _____

Date

Signature

Board and Committee Engagement

Board and Committee Member “Menu” of Engagement Form

This is an “all-you-can-eat” menu! Please choose as many items as you like—but at least one per category. A monthly update will be provided at board & committee meetings based on your input, using a tracking document

Name: _____ **Date:** _____

APPETIZERS

- Make thank you calls to 10 donors annually
- Once a year share enews with 5 friends/colleagues
 - Provide names of 10 donor prospects
- Sign and personalize letters to 15 current or prospective donors
- Write short article: “Why I care for [YOUR ORG NAME]” for e-news
 - Bring 5 guests to tour and learn more about us annually

ENTREES

Make a financial gift that is significant to me -- requested by ALL

- Secure a financial contribution from my place of business
- Identify 2 new community members to serve on the board
- Host a donor recognition or fundraising event at my home or work
 - Bring 15 guests to tour & learn about us annually
 - Attend a donor ask with staff
 - Include [YOUR ORG NAME] in my estate plan

DESSERTS

- Make thank you calls to 15 donors annually
- Be assigned to and stay in contact annually with 2-3 donors
 - Bring 10 guests to tour & learn more about us annually
 - Post comments and/or photos occasionally on Facebook
 - Once a year share enews with 15 friends/colleagues
- Share at least 3 client stories with my community annually

Board of Directors Mini Self-Assessment

Name: _____

		Yes	No	Comment
1	In your opinion, does this board have a strategic vision for the organization?			
2	In your opinion, are board members in agreement on the strategic vision?			

		Very	Some	Not	Comment
3	How confident are you that the board as a whole has adopted an income strategy to ensure adequate resources?				
4	How confident are you that the board as a whole has a clear policy on the responsibilities of board members in fundraising?				
5	How confident are you the board as a whole currently contains an appropriate range of expertise and diversity to make it an effective governing body?				
6	How confident are you the board as a whole regularly assesses its work?				
7	How confident are you that the board as a whole orients new members properly so they can hit the ground running?				
8	How confident are you that most or all board members are adequately knowledgeable about our programs?				
9	How confident are you that most or all board members follow through on commitments they make as board members?				
10	How confident are you that most or all board members know what results and outcomes each board member need to create this year?				
11	What information would you like to have in order to be a better board member?				

Before you rush off to your board meeting with all of these templates and tools, take time to discuss with your board and staff leadership the answers to this question:

What would a successful and fully engaged board look like?

Then go forth and use these tools to create exactly that experience!

Reference Blog Posts

Fire Starters Blog Posts to help guide you and your team

(These are live links! Just click and read.)

- [Blessing or Curse: Board Members & Fund Development](#)
- [Increase Board Engagement With a Fun 4-Step Scavenger Hunt](#)
- [Listen: My Perspective on Board Recruitment and Retention](#)
- [Six Steps to Exceptional Nonprofit Boards](#)

To learn more about customized board & staff trainings contact:
support@ignitedfundraising.com or 612-567-2105