

# **BOARD** **FUNDRAISING** **PRO**

## ***Guidebook***

[boards.askingmatters.com/](https://boards.askingmatters.com/)

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## Introduction

Dear Board Training Leader,

I can't tell you how delighted I am that you chose to subscribe to Board Fundraising Pro.

My hope is Board Fundraising Pro allows me to be your in-house expert – to partner with you in helping create a stronger fundraising board.

The Board Fundraising Pro Guidebook is designed to help you get the most out of Board Fundraising Pro, give you direction, and help in planning ongoing training and coaching for your board.

If anything here is unclear, or if you have a question about how to get past a hurdle, please contact me at [brian@askingmatters.com](mailto:brian@askingmatters.com). Your questions, along with those of your peers, will help me continue refining Board Fundraising Pro so it's as effective as can be.

Let's get started together.

A handwritten signature in black ink, appearing to read 'Brian', with a stylized flourish at the end.

Brian

# 1. Familiarize Yourself

Take some time to read through this Guidebook. Also, look closely at your organization's Board Fundraising Pro Landing Page so you understand what you're asking board members to do.

Ideally this would mean your watching all the videos but, realistically, your goal should be to stay one step ahead of the board. Make sure to familiarize yourself with the content before you assign it to board members.

To access your Landing Page you need a password. We let you choose the password you'd like everyone to use. That should have been provided at set up but, If you haven't chosen one yet, please email [boards@askingmatters.com](mailto:boards@askingmatters.com) with your preferred password and we'll get that set up for you.

## 2. Figure Out Who Gets Trained

Every board is different, so the answer to 'Who gets trained?' will vary depending on your organization.

Having said that, I am a big fan of training the entire board at once so everyone's on the same page and knows this is a shared responsibility. I often find those who are very resistant can be brought along once they understand what good board fundraising is. They say, "Oh, I can do this. Before this training, I thought you were going to want me to hit up everyone I know. This makes sense and I will do it."

However, some organizations really have a lot of work to do to get everyone on board.

Is your whole board ready to be trained or does it benefit you to start with a small group? What's your sense?

If you've got a board that's been resistant to training and/or fundraising, you might consider working with the small group of board members who are willing and ready. Starting with a core group might allow you to rack up some successes before the harder sell of involving everyone.

Just be sure you're not letting the others off too easily. At the end of the day, board fundraising must be the job of everyone in order to get the best results..

### 3. Build a Leadership Team

Someone, or a small committee, needs to be in charge of fundraising training. The work involves introducing the training to the whole board, setting up the calendar, leading various discussions, and continuously keeping fundraising training on the front burner. The leadership team should plan to have a meeting at least quarterly to keep things moving.

Are you a one-person team? A board member who is really enthusiastic about training and has the backing of the board? An executive director of a small shop? A director of development of a larger shop? If you're going it alone, you can skip the rest of this section and go to #4.

If you only plan to train a few board members, the leadership team and the group to be trained could be one and the same.

The ideal leadership team, if you're training the whole board, would include the director of development, the executive director, and at least two board members. Your leadership team might be two staff and one of your standing committees, such as fundraising/resource development, governance, or executive. However, your leadership team does not have to be "ideal" to be successful and only you know best who would be most effective..

So, figure out who is going to be on your team and have them read the Guidebook and familiarize themselves with your Landing Page before you meet.

Then have a planning meeting to figure out the calendar, communications, tasks, etc.

## 4. Make a Plan

Any plan, to be effective, needs goals, specific actions, deadlines, and assignments. But your plan doesn't need to be ten pages long.

Regardless of how quickly your board works through the first steps of Board Fundraising Pro, reinforcing the ideas takes time and reiteration. Training is never done.

Your board might decide to have an initial multi-hour special meeting, akin to the trainings I often do around the country, and then spend the year reinforcing what everyone learned. For a sample half-day board retreat agenda, see [Appendix A](#). This agenda can also be split into two separate sessions, minus the lunch.

You might extend the initial board meeting by an hour and then have a few virtual sessions to continue the work.

What will work best for your board?

Here are some possible goals for the first year of board fundraising training:

- Incorporate 15 minutes of fundraising training into every board meeting.
- Have one 4-hour or two 2-hour training sessions during the year.
- Communicate monthly with your board about fundraising (in addition to what they get from Board Fundraising Pro).
- Work directly with four board members on their prospects.
- Get 75% of all board members comfortable telling their story.



- Share a list of your top 50 donors/prospects and get at least 30 of them assigned to board members for ongoing cultivation, stewardship and, possibly, asking.

Once you set your goals, make a calendar of what you hope to accomplish by month and who will be responsible.

You can find a sample plan and calendars in [Appendices B & C](#).

## 5. Introduce Everyone to Board Fundraising Pro

Now it's time to present your board fundraising plan and Board Fundraising Pro to your board. Can a board member do the introduction? Perhaps someone on your leadership team or a board leader can do it. If not, the introduction should be done by the executive director and/or director of development if you have one.

If your board has already agreed to fundraising training, you or your board leader(s) might simply send an introductory email outlining what's to come. You can find a sample letter in [Appendix D](#).

**NOTE:** While the ongoing work must be implemented by staff (if there is staff), it is helpful for the stage to be set by board members. It is important that peers set their own expectations.

The presentation/email should include the following:

1. Why your board's involvement in fundraising is so important, including what you hope to accomplish as an organization. You might pull key thoughts from the "Setting the Stage" video.
2. How you're going to support those efforts through Board Fundraising Pro and ongoing fundraising training, coaching, and support. Perhaps project the Landing Page onto a large screen to help orient your board members.
3. That you're going to sign up everyone for the program and they will start receiving emails and weekly communication from us.
4. Going forward, they'll be asked to log into the system to watch the video trainings using the password you've chosen.

## 6. Start Training – The Curriculum

*And we're off!*

Take this at your organization's pace. As noted earlier, you might build an off-site training to get through all the formal training in one session. You might spread it out over many months. I would caution against taking more than four months to get through the core videos as you want to build momentum and, if you take too long, you risk people forgetting what they learned.

Whatever pace works for you, be sure to build in time for rich discussions along the way.

The two longer videos have worksheets, and you can ask board members to share some of their responses during a discussion. In all cases I've listed helpful discussion questions.

Additionally, for some topics there are specific exercises you might want to complete in break-out groups. I often divide people into groups as it ensures everyone participates.

The videos and discussions below are sequential and should be assigned in the prescribed order. As noted before, you can assign all four and discuss them together or you can take them one at a time.

## I. Welcome Video

*9 minutes*

This video is sent to everyone when you sign them up for the mailing list. However, you may want to show this video to your board again at the initial training session. It helps frame the training process.

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## II. Setting the Stage

*19 minutes + worksheet*

This video covers a) our mindset about money versus our mindset about philanthropy, b) why asking matters, and c) best practices for board fundraising (and giving). You might assign the whole video but discuss each of the three sections separately, or you might carve out time (generally a full hour or more) to discuss them all at once.

### **Discussion:**

Before diving into the content, go around the room (or screen) and ask everyone why they are passionate about your organization. At the end of the day, we want our board members to help fundraise because they're passionate about the organization... not because it's an obligation of board membership.

### **Mindset**

I always start training by talking about mindset. What is our mindset as a fundraiser versus our mindset as a donor? We often bring complicated stories about money to the table, yet our donors are there thinking of generosity and philanthropy.

### **Discussion Questions:**

- What is your money story?
- How would you describe money in two words? Money is \_\_\_\_ and \_\_\_\_? (from worksheet)

### **Exercise: Meaningful Gifts (7 minutes)**

- Break into groups of 3.
- What's the most meaningful charitable gift you've ever made (no need to share the amount – just perhaps what motivated it and who it benefited)? How did you feel when you made it? How did it impact your thoughts on charitable giving?
- Come back together and have at least 3 or 4 board members share their stories.
- Underscore the difference between our money mindset as fundraisers and our donors' mindset.

### **Why Cultivating & Asking Matter**

Board members tend to think the bulk of an organization's money comes from foundations and corporations when, in fact, it's individuals. They also think that's the most economical way to raise it. Sharing the data on where the money comes from and what it costs to raise it will help them focus on where we need them most – building relationships with individuals.

### **Discussion Questions:**

- What are all the things that cause you anxiety when thinking about fundraising? (from worksheet)
- What are all the things that excite you about your organization?
- What did you think of the statistics on giving? Did they surprise you?

### **Best Practices in Board Fundraising**

I'm a strong believer that everyone should give and fundraise ("get") to the best of their ability. No minimums. No give or get.

Your board might not move completely in that direction, but without an agreement that everyone must do their best at fundraising it will be hard to set and enforce goals that involve everyone.

### **Discussion Questions:**

- What makes a gift personally significant to you? (from worksheet)
  - What is a major gift for our organization? Does this serve us well? Can everyone agree that we should only be spending our time on those who do or can make a gift at this level?
  - What is our current board giving/fundraising policy? If it's "give or get at least x" or some other policy that gives board members an out for fundraising, might we update the policy to ask everyone to do their best even if we maintain a board giving minimum?
  - Does each board member have four people who they think would become major gift donors with the right cultivation over time? If not, would they be willing to help us cultivate our current donors? Would everyone agree to that?
- 

## **III. The Asking Styles**

### **Step 1: Watch "An Introduction to the Asking Styles"**

*9 minutes*

### **Step 2: Take the Quiz**

- Have everyone go to [quiz.askingmatters.com](https://quiz.askingmatters.com) to take the 30-question, true/false quiz. It should only take 2-3 minutes to complete. Ask them to use the email you provided to us when prompted.
- Let them know they'll get results immediately on the site and by email.

- Ask them to report back to you **both their Primary and Secondary Asking Styles** as soon as they receive them. Having everyone's results will give you a better understanding of the team and enable you to map them out (see next section) for an interesting group exercise. Down the road, as you lead brief exercises, you might put people into groups based on the Styles (either grouping them by Style or mixing and matching Styles).

### Step 3: Watch Individual Asking Styles Trainings

*~ 35 minutes + worksheet*

These videos explain the individual Styles and give examples of how to apply them throughout the cultivation and asking process. They touch on Secondary Styles as well.

By the way, I recommend you and your leadership team consider watching not only the video for your Style, but (eventually?!) all four, as you'll get deeper insight into how everyone functions.

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If you're meeting in person, use the Asking Styles Name Tag Template (found on your Landing Page under Resources) to provide everyone with a tag they can wear during the discussions. The tags inspire discussion and reflection as board members start to hear fellow board members' responses through their Styles. They're particularly useful in breakout sessions. Print them in color if possible as they will read more clearly.

If meeting virtually, consider asking everyone to make their own name tag with their Style on it large enough to be seen on a small screen. If not, at least have them change their screen name to include their Style, such as "Brian Saber – Kindred Spirit."

## Discussion:

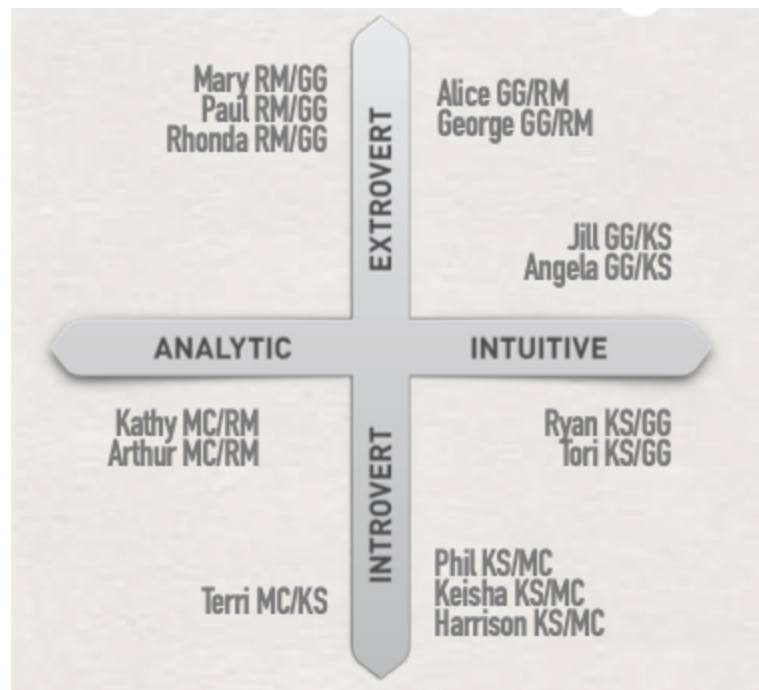
### Asking Styles Feedback (10 minutes)

- Ask for volunteers to share what they learned about themselves.
- What struck you most from the videos?
- What do you think your top two strengths are given your personality?
- What's the one thing that might challenge you most given your personality?
- Any surprises?

### Mapping the Board (5-10 minutes)

- Come with a simple graph on a large piece of flip chart paper (or be ready to share on your screen). Have the board's results mapped based on Primary and Secondary Styles. You might also add key staff members who interact with board members (in another color if possible).

**NOTE:** Alice is a Go-Getter/Rainmaker so she's in the Go-Getter quadrant but close to the Extrovert axis.





- Ask for feedback. Are you balanced as a team? If not, can you see where the imbalance impacts the board?

### **Exercise:**

#### *Partnering (15 minutes)*

- Introduce the exercise in terms of how helpful it is to build two relationships between a donor and your organization. The more relationships a donor has the stronger the bond will be. It also helps when someone from the organization leaves in that there is still a strong relationship to someone. There are lots of permutations and often in small organizations it comes down to who's available.
- Break into groups (including attending staff) of two and ask groups to discuss how they might work with each other based on their Asking Styles. What does each bring to the table? How might they interact with a donor? Could they take different roles?
- Bring everyone together and ask for a few teams to report back.

### **Select Prospects**

Board members will rarely be as comfortable cultivating and possibly soliciting donors as staff will be. Their relationship to the organization is different, their experience is different, and it's harder for them to put aside the personal aspect for those in their networks. So, you've got to give them some leeway in terms of who their prospects are, and at the same time expand their sense of who's in their circle of influence.

### **Discussion:**

What type of donor would you be most comfortable cultivating and soliciting? Of everyone you know, who would be easiest to cultivate and solicit? Who would be the least comfortable? Since donors have an Asking Style as well, is there a donor of a certain Style you'd find hardest to work with? Why?

## **Exercise:**

### *Broaden Your Network*

- Share this list of networks on a flipchart or the screen and ask everyone to identify their three strongest networks:
  - Family
  - Friends
  - Fellow employees
  - Peers in my industry
  - Fellow worshippers
  - Fellow parents
  - Fellow volunteers
  - Neighbors
  - Fellow club members
  - Fellow alumni
  - Social media friends
  - People I pay for services
  - People I've helped out
- Ask everyone to make note of four people from among those networks who, with the proper cultivation, could make a gift at the major gift level you agreed to earlier. Note that they shouldn't assume they have to ask for the gift just because someone's on their list (though it's often helpful).
- If someone says they don't have four, remind them the organization has donors and prospects who need more attention, and they can choose from that list during a follow-up conversation.
- Close by saying you'll reach out to each board member individually to come up with cultivation (and possibly solicitation) plans for everyone identified.

## Tell Your Compelling Story

A board member's individual case for support, or story, is the most important piece of the pie. Getting as much practice telling it as possible is key to their feeling comfortable talking to others.

### Discussion Questions:

- Share your organization's mission statement as a reminder. (Our mission is to....)
- What is the vision of our organization? Do we have one in writing? How does that differ from our mission statement?
- How would each of us complete the following sentence (maybe go around the room or have everyone type in):
  - "If our organization succeeds at fulfilling its mission, \_\_\_\_\_"

### Exercises:

#### *Features/Benefits/Impacts (10-15 minutes)*

- Note: You can do this as one full group or in breakouts of 3-5 people.
- Make a chart with three columns with Features, Benefits, and Impacts as the headings.
- Ask people to name the features of your organization. Try to get 7-10 on the chart. (Examples of features include: "we run this program," "we have 300 miles of trails," "we serve hot meals to seniors")
- What is the benefit of having each of those features? Note: often people say something more akin to another feature, so feel free to push them until it sounds like they've shared a benefit.
- What is the impact that each benefit has on your program participants?
- Keep asking "why?" until you are talking about changing lives or making other impacts on that level.
- If you broke into groups, have each group share 2 or 3 examples.

#### *Telling Your Story (15-20 minutes)*

- Introduce this exercise by saying everyone will tell their own story based on their Asking Style. What's most important is that the story is authentic to who they are and is one they're passionate about. Stories should always focus on vision and impact. Everyone will have one minute because that's all we often get in social situations and, if we practice, we can say a lot in that one minute.
- Break into groups of 3.
- Ask someone in each group to be the timer using their phone.
- In each group, each person should answer one of the following questions in 1 minute (they must stop at a minute). The goal should be to talk about vision and impact as much as possible in that one minute.
  - Tell me about your organization.
  - Why are you so passionate about your organization?
  - What are you hoping to accomplish at your organization?
- Each group then has a five-minute discussion:
  - What did we like best about our own and each other's stories?
  - Did we get to vision and impact?
  - Could we see how our Asking Style impacted our story?
- Everyone tells their 1-minute story again (no need to discuss after).
- Come back together and have a few people/groups share what they experienced and learned.

## Cultivate Donors Year-Round

As with any individual gift program, most of the work is done throughout the year as we cultivate, educate, involve, and thank/recognize our donors. Once your board members see the strategic role they can play throughout the year and over time, they will be much more inclined to be involved. For most organizations, this ongoing cultivation is the work staff doesn't have the time to do. We want board members to visualize what can be accomplished if they serve as mini major-gift officers.

### Discussion

- Either as one group or in breakouts, have board members come up with lists of all the...
  - ways to educate donors about the organization
  - ways to involve donors as volunteers
  - things to ask for other than a cash gift
  - ways to thank donors
- Make note of how these often overlap: involving donors as volunteers will educate them, asking them for in-kind contributions not only brings resources but involves them, etc.

## Set Up Meetings

Reaching out to donors makes board members (and many of us) nervous. It's where we might first encounter resistance or downright rejection. Understanding one's own dynamics in setting up meetings is important.

### Discussion Questions

- *Focused & Strong* – what items on the list would be most important for each of us to remember? Which resonate the most with you? (perhaps share the list on a screen/flipchart)
  - it's not about me – I am the messenger
  - remember why I love our cause
  - I'm not begging
  - it's not about the money – it's about the relationship
  - there's no such thing as a perfect ask
  - I'll never have all the information
  - My donor is anxious, just as I might be
  - don't ask, don't get
- How would you reach out to set up a meeting? Would you call, write, or text? What's most comfortable for you? What if you know your donor wants you to reach out in a different way?

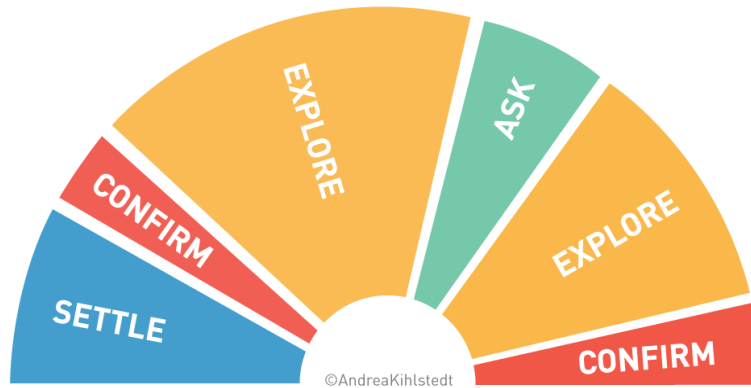
- What's hardest for you about someone resisting your efforts to set a meeting? How do you respond? What are some tools you've learned from others?

### **Exercise:**

- Introduce the exercise by telling them that setting up meetings by calling is harder than by writing, since you need to respond in the moment without time to think. So, it's good to practice by roleplaying. Also note that emails with sample wording for setting up meetings are provided at the bottom of the Landing Page. Some of this verbiage can be studied to use when calling.
- Break people into groups of two.
- Ask them to rollplay twice. First one is the fundraiser and the other is the donor, and then they switch.
- The donor should be someone who already has a relationship with your organization, and with whom you'd like to build a stronger relationship by meeting and getting to know them better.

## **Have Intentional Meetings**

Every meeting has an arc to it. At Asking Matters, co-founder Andrea Kihlstedt developed the Arc of the Ask as a framework to ensure all donor conversations are intentional. While every situation is unique, each of the pieces of the Arc is important to cover.



### Discussion Questions:

- What are the easiest and hardest parts of the conversation for you?
- What have you taken from the recorded training that will help you through the challenging parts of the meeting?

### Exercise:

- *Preparation:* If in person, print the *Intentional Conversation Outline* from the resources at the bottom of the Landing Page and make copies for everyone. Introduce the exercise as a way to discuss how a meeting might unfold.
- Breakout into groups of 3 where two of you are fundraisers and one of you is a donor. Share your Asking Styles with each other.
- Discuss one (or both) of the following scenarios:
  - *Scenario 1:* This is a meeting to get to know someone who has great capacity but has only given a few modest gifts, mostly in response to invitations to your fundraising events. This isn't a solicitation meeting.
  - *Scenario 2:* This is a meeting to ask an ongoing donor to increase their annual support from \$5,000 to \$10,000. They've been giving at this level for 5 years.
- Given your Asking Styles, how might the meeting unfold for you step by step?

- Which fundraiser might lead each part of the meeting?
- What can you expect from the donor given their Style and how might you as fundraisers accommodate that?
- Come back together and have at least two groups report back.

## Wrap Up and Next Steps

Once you've completed the initial training, debrief as a group.

- Was this training helpful?
- What are your biggest takeaways?
- Can everyone see their role in fundraising?
- Is it something you feel you can do?
- In what ways would you like us to practice further as a group or individually?



## 7. Ongoing

*The key to board fundraising is for the training, practice, and motivation to be ongoing.*

### Focus on Fundraising at Every Board Meeting

Often the only fundraising on the board agenda is a report on fundraising to date and what's coming up. Most of that can be shared in a report rather than taking precious meeting time. This also gives you room for more important fundraising topics.

Take at least 10-15 minutes at every board meeting to either:

- A. lead a quick fundraising exercise,
- B. have a board member share their fundraising success story, or
- C. discuss one of the Monday Morning Board Matters or monthly newsletter items. Every newsletter (see below) will have ideas for discussions you can have at upcoming board meetings.

### Highlight Great Material from the Field

If you're a staff member, you're probably on lots of email lists from fundraising consultants, periodicals, bloggers, etc. If you're leading this as a board member, make sure you are on a few lists. Make a note to share something interesting with your board at least once or twice a month.

### Ask Board Members to Rate Prospects

Two or three times a year send the board a list of 25-50 names of prospects/donors who the organization would like to get to know better, cultivate more closely, or ask for a more significant gift. Find out how well your board members know these people, how comfortable they would be getting involved in the cultivation process, and what

they know that would help you in your work. You can use our Prospect Selection Chart template (found at the bottom of your Landing Page) and modify it for your needs.

## 8. Communications from Us

I strongly encourage you to sign up everyone for Board Fundraising Pro as it's helpful for board members to hear directly from outside experts, it's helpful for everyone to hear the same thing, and you can refer back to the communications board members receive directly. And ask people not to opt out once they are signed up.

**NOTE:** *If you would like additional staff to get our communications, please sign them up through your Landing Page.*

### Monday Morning Board Matters

Every Monday we will send you and your board members Monday Morning Board Matters. It will be a brief thought that takes 10 seconds to read and is intended to enlighten or motivate your board members.

### Board Fundraising Newsletter

Everyone will receive a monthly newsletter. It will include a best practice, an Asking Styles tip, a brief exercise, and/or an example of what another organization is doing to help their board members fundraise.

We encourage you to refer to these communications in interactions with your board. You might discuss a best practice or tip at a board meeting or with your team. You might use one of the exercises in your next board meeting. Or ask everyone in a group chat for feedback on something we shared.

### Special Webinars

At least four times a year we will hold a special 45-minute webinar which speaks directly to board members. Topics will include How to Deal with Personal

Relationships, How to Open the Door, Telling Your Best Story, Having Intentional Conversations, and more.

All webinars will be recorded, and slides will be available afterward.

## 9. Getting Help from Us

You need help when you need it. So, if you're stuck or don't understand something, please email me at [brian@askingmatters.com](mailto:brian@askingmatters.com) and I will help you. If you're really struggling, we can talk about engaging me briefly for more significant coaching, or you might consider the next level of Board Fundraising Pro.

## 10. Onboarding New Members

Board Fundraising Pro is designed to make sure everyone is up to speed and engaged. When you elect a new board member, going through the training should be required. It's your call as to how soon you ask them to take these steps, but the sooner you do it the more you signal the importance of board fundraising.

Once a new board member has watched the videos, you or someone from your team should have a 60-minute conversation where you talk about what they've learned, share the map of your board's Styles, and have a conversation about partnering (perhaps with you) so they know they're not expected to be lone rangers.

## 11. Additional Resources

Please feel free to download all our additional resources. They can be found at the bottom of your Landing Page.

### Materials

Asking Styles Name Tag Template

Side-by-Side Resource Development Form

Sample Contact Report

Conversation Questions for Cultivation and Solicitation Meetings

Sample Ask-for-the-Meeting Letters

Intentional Conversation Worksheet

Top Ten Ways to Ensure You Get a Meeting

Top Ten Ways to Make Your Donor Feel Special

Sample Board Fundraising Training Plan

Sample Training Calendars

### Additional Exercises

Your Asking Style Matters

Scheduling the Meeting by Phone

Responding to Resistance to Meeting

Having an Intentional Conversation

Making the Ask

# Appendix A

## 4-Hour Board Retreat Agenda

This timing assumes everyone has watched all four videos. If you plan to watch the first three as a group, please add time as required. As the fourth video is customized for each Style, that one cannot be watched together.

**10:00 Introductions**

**10:10 Mindset**  
Breakout

**10:25 Why Asking Matters**  
Breakout

**10:40 Best Practices**  
Group Discussion & Breakout

**11:00 10-Minute Break**

**11:10 Asking Styles**  
Group Discussion & Breakout

**11:30 Developing Your Story**  
Group Discussion & Breakout

**12:00 Selecting Prospects**  
Group Discussion

**12:15 Lunch**

**12:45 The Donor Cycle**

## Breakout

### **1:10 Setting Up Meetings**

Discussion

### **1:25 Conducting Meetings**

Discussion & Breakout

### **1:50 Wrap-Up and Next Steps**

# Appendix B

## Sample Board Fundraising Plan

*Goal: Increase board involvement in fundraising*

### Strategy 1: Train the board how to fundraise

<u>Task</u>	<u>Responsibility</u>	<u>Timeline</u>
1. Run half-day training	Leadership Team	10/22
2. Incorporate fundraising training/discussion into every board meeting	Leadership Team	All year

### Strategy 2: Meet with each board member individually to create their personal fundraising action plan for the year.

<u>Task</u>	<u>Responsibility</u>	<u>Timeline</u>
1. Executive or Governance Committee to meet to strategize and assign committee members	ExCom or Gov ExCom or Gov	April 23 by 6/30/23
2. Have individual meetings w/ each board member		
3. Develop board fundraising plan	Staff	by 7/15/23



### Strategy 3: Ask board members for input on donors

<u>Task</u>	<u>Responsibility</u>	<u>Timeline</u>
1. Circulate list of 25-50 donors using AM Prospect Selection Chart	Staff	8/15/22 & 2/15/23
2. Collate all information and input in system	Staff	w/in 15 days

### Strategy 4: Have board members thank all major donors

<u>Task</u>	<u>Responsibility</u>	<u>Timeline</u>
3. Circulate list of 25-50 donors with assignments (always keep donors with the same board members)	Staff	8/15/22 & 2/15/23
4. Collate all information and input in system	Staff	w/in 15 days

# Appendix C

## Board Fundraising Training Calendar

### January Board Meeting

- Introduce Board Fundraising Pro

### February

- Half-day offsite training (or two 2-hour virtual trainings a week apart)

### March Board Meeting

- Debrief on training
- 15-minute Telling Your Story exercise

### April

- Send list of 50 organization donors and ask for feedback

### May Board Meeting

- Introduce individual conversations with each board member to discuss their four prospects and the next steps (stewardship) they will take

### June

- All board members make contact with each prospect (use cultivation opportunities list you created for ideas)

### July Board Meeting

- Progress report on board stewardship
- 15-minute Telling Your Story Exercise (again!)

## **August**

- All board members make contact with each prospect

## **September Board Meeting**

- Progress report on board stewardship
- 10-minutes with board members sharing their experiences

## **October**

- All board members make contact with each prospect

## **November Board Meeting**

- Progress report on board stewardship
- Discussion of goals for following year

## **December**

- Board members thank any of their donors who make end-of-year gifts and also call other donors who have made gifts

## Appendix D

### Sample Introductory Email to Your Board Members

Dear (Fellow) Board Members,

We are excited to dive into Board Fundraising Pro so we can all learn how to be better fundraisers for the Libertyville Senior Center.

We've gone through all the materials ourselves and have learned so much. We can't wait for you to start going through the materials and for us to have lots of rich discussions together.

Based on your feedback (or whatever method you used), we have laid out the initial training the following way (or "we've scheduled a full board retreat for\_\_\_\_\_"):

(Insert Your calendar, etc.)

Please make every effort to participate fully so we can be the strongest team possible.

Our next step will be to sign everyone up for Board Fundraising Pro using the same email we use to communicate with you. Please do not opt out as it's important you get the weekly and monthly communications from Board Fundraising Pro going forward.

So be on the lookout for a welcome letter, and please immediately take a moment to watch the brief Welcome Video from Asking Matters President Brian Saber.

We'll be back in touch shortly and can't wait for our first training with you.

Sincerely,

Board Fundraising Leadership Team  
(or a committee name or individual names)