

## **A Note on XXX Board of Directors**

(Simplified deliverable for Board Development/Training with past client)

XXX needs its board members to support the organization with their own personal philanthropy, to act as ambassadors for the organization among their networks, and to participate in fundraising activities in ways that are tailored to their personal interests and capabilities. Their participation publicly reflects the commitment of XXX's leadership to the organization and specifically the fundraising program.

Many foundations and philanthropists inquire about board giving. Additionally, as board members invite others to support XXX, it is helpful if they can authentically share not only their passion and commitment to the organization, but their personal experience of giving.

An annual board campaign will help achieve XXX's goal for growth. The board campaign will have two goals of its own:

- 100% participation
- Personally meaningful gifts

These goals recognize that the capacity of individual board members will vary and that an individual's capacity may even vary from year to year. The Board of Directors are a special constituency of supporters and should be treated with as much respect and thought as any other major donor. Their participation is critical to the success of the organization but should never be assumed or taken for granted. They should be assigned to the Executive Director's portfolio in partnership with the Board Chair as appropriate, and with the future Director of Development playing a supporting role.

Annual Board Campaign Overview:

- Executive Director (and/or Board Chair) make a personal gift.
- Executive Director (and/or Board Chair) meets individually and privately with each board member (preferably in person, if possible) to discuss the level of support he/she is considering this year. A spouse or significant other may be included as appropriate. Questions ED would ask include:
  - Will you consider making a personally significant gift?
  - Are you willing to solicit sponsorships or other gifts?
  - Are you able to attend events-purchase tickets and invite others?
  - Would you like to give your time or talents beyond standard board service?
- Conversations and commitments are tracked in moves management/database as other gifts are. Specific processes to be determined in upcoming months.
- Stewardship practices-also to be discussed further-still apply!

## **Introduction to Discovery Phone Calls**

(Simplified Deliverable from a long-term major gift program project/training)

The goal of a discovery call is just that: to learn about the donor. This is not the time to “sell” XXX but to take the time to get to know the donor, their values, and their philanthropic goals. As the conversation progresses, you can also glean what concerns or hesitations they have about your mission, programs, or willingness to make a gift.

As with all major gift conversations, we should listen more than talk. Avoid yes or no questions. Ask open ended questions and follow up questions to their responses.

Don't worry about having a polished presentation at the ready. Prepare your key questions or information you hope to glean, any asks if appropriate, and do not forget to leave the ball in your court with some follow up or next steps.

### **Personal Questions**

- Tell me about your life/family.
- What do you love about what you do?
- What values do you hold most dear?
- How does one make a difference in the world?
- What is most important to you?

### **XXX Mission & Philanthropy Related Questions**

- What causes are you most passionate about?
- What do you hope to achieve with your philanthropy?
- What legacy do you want to have?
- What was the best gift you ever gave and why?
- Which of the organizations that you support does the best job of keeping you involved? How?
- Why does XXX's cause matter to you?
- Are there particular programs or areas that interest you?
- What inspired your first gift?
- How do you like to be invited to make a gift?
- Do you have any feedback for us?
- Is there any way we can make your experience more positive?
- How can we get you more involved?
- May I invite you to (event, volunteer, etc.)?
- Can I introduce you to (Board Chair, donor in your community, staff member)?
- As you think about the future of our work, what are some of your worries?

## XXX Draft Work Plan

(Simplified work plan from smaller project to refine organization’s general case for support and update annual calendar of donor communications)

Week of:	Work Plan/Deliverables
June 15	<ul style="list-style-type: none"> <li>• Virtual Launch Meeting (June 17<sup>th</sup>)               <ul style="list-style-type: none"> <li>○ Review/refine project goals, mission, programs, and impact</li> <li>○ Review summary of messaging/approach to developing communications to date</li> <li>○ Review samples of email, direct mail, and social media posts (as applicable)</li> <li>○ Review snapshot of current donor demographics</li> </ul> </li> <li>• TMS to continue reviewing materials after meeting Refine message to draft case for support as foundation for future XXX messages</li> </ul>
June 22	<ul style="list-style-type: none"> <li>• Virtual meeting – follow up to launch meeting (ongoing information gathering)</li> </ul>
June 29	<ul style="list-style-type: none"> <li>• Virtual Meeting               <ul style="list-style-type: none"> <li>○ Create plan for testing case for support</li> <li>○ Create list of internal and external stakeholders</li> </ul> </li> </ul>
July 6, July 13, July 20, July 27	<ul style="list-style-type: none"> <li>• Virtual Meetings weekly</li> <li>• TMS to provide draft recommendations/case for support</li> <li>• XXX to review internally with staff and compile notes, questions, feedback, etc.               <ul style="list-style-type: none"> <li>○ TMS to refine the case based on XXX feedback</li> </ul> </li> <li>• XXX to contact external stakeholders to schedule “meetings” to test the case               <ul style="list-style-type: none"> <li>○ XXX to present case for support to stakeholders and collect feedback</li> </ul> </li> <li>• Compile feedback into cohesive document for discussion with TMS</li> <li>• XXX &amp; TMS to cooperate to refine the case for support throughout the process</li> </ul> <p>*I left a full month for this process because getting on supporters’ calendars for the month of July can be tricky!</p> <ul style="list-style-type: none"> <li>• XXX to share current calendar of communications/donor relations with TMS</li> </ul>
August 3	<ul style="list-style-type: none"> <li>• TMS to provide draft 12-month calendar of communications including direct mail, email, social media, and stewardship activities, including annual report               <ul style="list-style-type: none"> <li>○ XXX to review and compile feedback for next meeting</li> </ul> </li> </ul>
August 10	<ul style="list-style-type: none"> <li>• Virtual Meeting               <ul style="list-style-type: none"> <li>○ XXX shares feedback on calendar for discussion and review</li> <li>○ TMS to update/revise based on conversation and reshare</li> </ul> </li> </ul>
August 17	<ul style="list-style-type: none"> <li>• TMS to provide three donor communication templates               <ul style="list-style-type: none"> <li>○ Direct Mail</li> </ul> </li> </ul>

Week of:	Work Plan/Deliverables
	<ul style="list-style-type: none"> <li>○ Email</li> <li>○ IRS compliant thank you letter</li> <li>○ XXX to review and compile feedback for next meeting</li> </ul>
August 24	<ul style="list-style-type: none"> <li>● Virtual Meeting <ul style="list-style-type: none"> <li>○ XXX shares feedback on donor communication templates</li> <li>○ TMS to update/revise based on conversation and reshare</li> </ul> </li> </ul>
August 31	<ul style="list-style-type: none"> <li>● TMS to provide written best practices knowledge summary with recommendations for direct mail, email and stewardship communications to support templates shared last week along with recommendations on how XXX can adopt them <ul style="list-style-type: none"> <li>○ XXX to review and compile feedback for next meeting</li> </ul> </li> </ul>
Sept. 7	<ul style="list-style-type: none"> <li>● Virtual Meeting <ul style="list-style-type: none"> <li>○ XXX shares feedback on best practices summaries and recommendations</li> <li>○ TMS to update/revise based on conversation and reshare</li> </ul> </li> </ul>
Sept. 14	<ul style="list-style-type: none"> <li>● TMS to provide written best practices knowledge summary for social media as it relates to fundraising <ul style="list-style-type: none"> <li>○ XXX to review and compile feedback for next meeting</li> </ul> </li> </ul>
Sept. 21	<ul style="list-style-type: none"> <li>● Virtual Meeting <ul style="list-style-type: none"> <li>○ XXX shares feedback on social media summaries and recommendations</li> <li>○ TMS to update/revise based on conversation and reshare</li> </ul> </li> </ul>
Sept. 28	<ul style="list-style-type: none"> <li>● Catch-Up Week <ul style="list-style-type: none"> <li>○ Compile/Review all deliverables to date</li> <li>○ Update/refine as necessary</li> <li>○ Revisit scope of work – is there anything missing that we want to consider adding to the project?</li> </ul> </li> </ul>
October	<ul style="list-style-type: none"> <li>● Two virtual meetings</li> <li>● XXX begins to lead communications/process <ul style="list-style-type: none"> <li>○ XXX to provide feedback on XXX-crafted communications for remainder of project</li> </ul> </li> </ul>
November	<ul style="list-style-type: none"> <li>● Project Conclusion <ul style="list-style-type: none"> <li>○ Debrief Meeting</li> <li>○ Next Steps, if applicable/appropriate</li> </ul> </li> </ul>