



**THE TEAM APPROACH TO BOARD
ENGAGEMENT IN FUNDRAISING**

Board members shape the public's perception of the organization they serve through their *actions*, *reputations* and *leadership abilities*. Enthusiastic, dedicated and skillful involvement by each board member is critical for success. When Trustees successfully fulfill their responsibilities in raising funds, they ensure the present and future fiscal health of the organization. Conversely, when they resist their responsibilities for raising funds, they impede the organization's ability to compete philanthropically. Through adoption of a team approach to Board engagement in fundraising, all board members share the work and responsibilities for fundraising and become effective advocates for the organization.

Level three boards are characterized by:

- a. Board members are fully engaged with their own activities and prospects
- b. Board members personally ask others for annual and major gifts.
- c. The board is focused on building relationships with generous individuals for our organization.
- d. Board members give generous personal gifts demonstrative of leadership.

A team approach to fundraising implementation gives all board members a proportionately manageable role in implementing the integrated development plan. The Development Committee continues to exist and has as its members the Chairs of each team. The Development Committee has the responsibility for reviewing activities, scheduling, resolving prospect assignments if there is a conflict or concern regarding assigned categories, and informs the overall implementation of the development plan.

Teams may include but are not limited to: Lead Annual Giving, Major Gifts, Planned Giving and Sponsorship.

PROSPECT RATING AND REVIEW

Prospect rating and review is a critical element of planning. All Board members shall participate in prospect rating and review. Review of donors and prospects is conducted as needed including but not limited to:

- a. Donors who are ready, have made previous gifts and have been cultivated
- b. Donors who are ready, have made previous gifts
- c. Donors who have made cumulative gifts
- d. Donors who are rated highly and have been cultivated
- e. Family, friends and colleagues of donors
- f. Leads
- g. Participants: people who have attended receptions, openings, lectures, and express strong interest in the organization.
- h. Donors who have made estate gifts (wills, annuities, etc.)

The rating and review process shall include confidential preliminary discussion of:

1. Linkage
2. Ability
3. Interest
4. Best organizational contact
5. Other relevant data

LEAD ANNUAL GIVING TEAM

The Lead Annual Giving Team shall support all efforts to obtain philanthropic gifts that support operations. The focus shall be on the top 10% of donors who make leadership level gifts to the annual fund programs and priorities. Primary activities shall include activities which identify, cultivate and solicit annual gift donors and prospects.

Board Members shall serve as lead volunteer for no less than five but not more than nine prospects as the lead volunteer.

Activities may include but are not limited to:

Strategy: Develop customized cultivation plans

1. Cultivate Prospects
 - Establish and implement follow up plan
 - a. Direct mail
 - i. Select donors and prospects for personal calls and note writing.
 - b. Event invitations, if appropriate
 - c. Outreach event invitations
 - d. Other

Strategy: Conduct small group cultivation events.

1. Develop event tactics
2. Issue individual invitations on a case-by-case basis.
3. Conduct events.
4. Develop and implement follow up plans.

Strategy: Solicitation

1. Solicit prospects as appropriate

Strategy: Develop Annual Fund Donor Recognition program

1. Review competitor Annual Fund donor recognition programs.
2. Develop Annual Fund donor recognition program.
3. Implement and evaluate Annual Fund donor recognition program.

YOUNG FRIENDS TEAM

The Young Friends Team shall support all efforts to obtain philanthropic gifts that support operations. The focus shall be on younger donors who make their first gifts as well as current younger donors with a goal of cultivating and upgrading their gifts to the annual fund programs and priorities. Primary activities shall include activities which identify, cultivate and solicit young donors and prospects.

Board Members shall serve as lead volunteer for no less than five but not more than nine prospects as the lead volunteer.

Activities may include but are not limited to:

Strategy: Develop appropriate cultivation plans

2. Cultivate Prospects
 - Establish and implement follow up plan
 - a. Direct mail
 - i. Select donors and prospects for personal calls and note writing.
 - b. Event invitations, if appropriate
 - c. Outreach event invitations
 - d. Other

Strategy: Conduct small group cultivation events.

5. Develop event tactics
6. Issue individual invitations on a case-by-case basis.
7. Conduct events.
8. Develop and implement follow up plans.

Strategy: Solicitation

2. Solicit prospects as appropriate

Strategy: Develop Young Friends Donor Recognition program

1. Review competitor Young Friends donor recognition programs.
2. Develop Young Friends donor recognition program.
3. Implement and evaluate Young Friends donor recognition program.

MAJOR GIVING TEAM

The Major Giving Team shall support all efforts to obtain philanthropic gifts that support new program development or asset development (reserve funds and capital programs). The focus shall be on the donors who make periodic major gifts to support board approved programs and priorities. Primary activities shall include activities which identify, cultivate and solicit major gift donors and prospects.

Board Members shall serve as lead volunteer for no less than one but not more than three prospects as the lead volunteer.

Activities may include but are not limited to:

Strategy: Develop customized cultivation plans

1. Establish and implement plan
 - a. Map out “moves” and timing
 - b. Who, what, where, when, how
 - c. Best outcome – by when and for what
 - d. Minimal outcome – what do you need to do by when
 - e. Backup plans
 - f. Keep contact going even if things are put on hold – illness, vacation, “too busy”

Strategy: Conduct individual cultivation events and individual visits.

1. Develop event tactics.
2. Issue individual invitations on a case-by-case basis.
3. Conduct events.
4. Schedule, implement and evaluate cultivation and solicitation visits.
5. Develop and implement follow up plans.

Strategy: Solicitation

1. Solicit prospects as appropriate

Strategy: Develop Major Gift Donor Recognition and Naming program

1. Review competitor Major Gift donor recognition and naming programs.
2. Develop Major Gift donor recognition and naming program.
3. Implement Major Gift donor and naming recognition as appropriate.

SPONSORSHIP TEAM

The Team shall support all efforts to obtain sponsorships that support philanthropic priorities. The focus shall be on corporate donors who make leadership level gifts to annual events and programs. Primary activities shall include activities which identify, cultivate and solicit sponsorship donors and prospects.

Board Members shall serve as lead volunteer for no less than five but not more than nine prospects as the lead volunteer.

Activities may include but are not limited to:

Strategy: Develop customized cultivation plans

1. Rate and Qualify Donors and Prospects.
 - a. Review and discuss
 - b. Linkage
 - c. Ability
 - d. Interest
 - e. Best organizational contact
 - f. other
2. Cultivate and solicit Prospects
 - a. Establish and implement plan
 - b. Other

PLANNED GIVING TEAM

The Planned Giving Team shall support all efforts to obtain philanthropic gifts made by donors through their estate plans. Primary activities shall include activities which identify, cultivate and solicit planned gift donors and prospects.

Board Members shall serve as lead volunteer for no less than one but not more than three prospects as the lead volunteer.

Activities may include but are not limited to:

Strategy: Conduct small group cultivation events and individual visits.

1. Develop event tactics.
2. Issue individual invitations on a case-by-case basis.
3. Conduct events.
4. Schedule, implement and evaluate cultivation and solicitation visits.
5. Develop and implement follow up plans.

Strategy: Solicitation

1. Solicit prospects as appropriate

Strategy: Develop Planned Gift Donor Recognition and Naming program

1. Review competitor Planned Gift donor recognition and naming programs.
2. Develop Planned Gift donor recognition and naming program.
3. Implement Planned Gift donor and naming recognition as appropriate.