



## Sample Board Fundraising Expectation Agreement

Fundraising is not one-size-fits-all. Your board will feel more comfortable in their fundraising commitments if expectations are clearly defined and you allow them to pick for themselves how best to help fundraising efforts. By having them complete the agreement annually you will allow them to move freely through the levels of involvement lessening pressure and allowing for growth.

<ORGANIZATION NAME> Board of Directors

### Individual Fundraising Plan

Please complete this form as your FYXX fundraising plan by confirming your personal gift, choosing the donor development activities you will participate in, and setting goals in those areas. It is important that each board member commits to at least one donor development activity.

My Financial Investment in <ORGANIZATION NAME>

Board members of are each expected to make an annual gift in an amount that is personally significant to them. Gifts may be pledged and paid over monthly or quarterly installments throughout the fiscal year, paid by gifts of appreciated securities, or to include matching gifts from your employer.

My personal donation for FYXX: \$\_\_\_\_\_

My company will match this amount: \$\_\_\_\_\_

### Donor Development Activities

#### Ambassador

- Attend events and send information on donors and prospects to staff.
- Invite friends, colleagues, and/or relatives to events.

- Host a house party or invite a friend to host a house party. House parties can educate our new friends and donors about 's programs and are also an opportunity to raise money. As host of a party, you will underwrite the cost of food and drinks, and open your home to friends and family.
- Months that are best for me: \_\_\_\_\_
- I have a friend who is available to host, and I will actively assist with the creation of the guest list.

### Connector

- Provide a list of prospects for donor cultivation and solicitation. The development director and fundraising committee will work with you one-on-one to develop an effective strategy for inviting your family, friends, or colleagues to support the work of.
- Arrange a prospective donor meeting with an individual, corporation, foundation, or governmental agency that can provide new funding to. Solicitation of prospective funding is more effective when personal contact is made. If you know any individuals and/or anyone in a corporation, foundation, or government agency that you can introduce personally to staff and participate in a meeting, you can play a key role in 's fundraising. Additionally, you may know of trustees who can make discretionary grants to or can be especially helpful in advocating for on key proposals.
- I am interested in facilitating a donor meeting or specific communication with foundation trustees.
- Watch for names of prospects from annual reports, newspapers, etc., and send to staff.

### Solicitor

- Participate in major donor fundraising by serving as a contact, participating in a meeting, and/or making ask(s). Raising unrestricted funds is an important component of 's fundraising plan, and solicitations from major donors is an important strategy.
- My goal to raise through major donor fundraising: \$\_\_\_\_\_
- Solicit a sponsor for an event. Events are an important opportunity to solicit corporate sponsorship or to invite the support of other potential donors. We will let the board know in advance about the scheduled events so you have enough time to solicit sponsors.

- My goal to raise through an event: \$\_\_\_\_\_

### Steward

- Make thank you calls to donors and supporters. This activity involves calling and/or emailing donors to say thank you. It is an opportunity to thank the donors for their support, answer any questions, and learn more about the donor. You will be given information and assistance to make these thank you calls.
- Write notes to major donors on event invitations, annual solicitation letters, etc. Other
- Other ways to support fundraising. Please include ways you can volunteer your services to or other ways you hope to raise funds for the organization (e.g., auction items).

My overall fundraising goal: \$\_\_\_\_\_

I agree to fulfill the above-stated fundraising goals to the best of my ability.

SIGNATURE\_\_\_\_\_ DATE\_\_\_\_\_

Source: [https://www.networkforgood.com/wp-content/uploads/2019/05/eGuide\\_How-to-Engage-and-Activate-Your-Nonprofit-Board.pdf](https://www.networkforgood.com/wp-content/uploads/2019/05/eGuide_How-to-Engage-and-Activate-Your-Nonprofit-Board.pdf)