

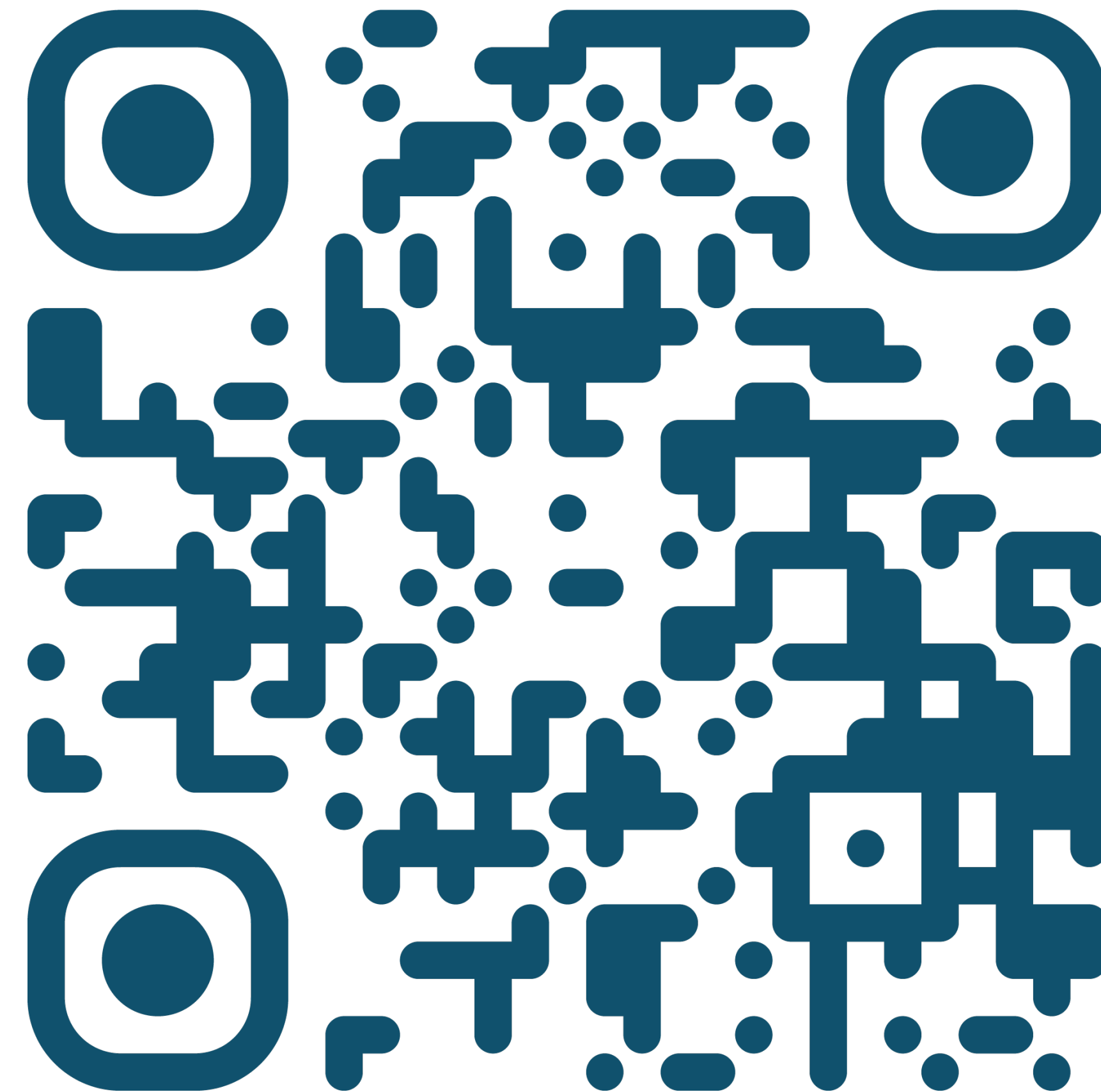
Building a Better Board

3 I's of Board Engagement





EPIC Road Trip



<https://bit.ly/EPICAZ>

Ingredients for an EPIC road trip?

34 Responses





5 Stages of Board Service



Recruiting



Onboarding



Orienting



Engaging



Renewing

1. Recruiting





Recruit based on talent.

Recruit based on experience.

Recruit based on passion.

Then sit back and watch the magic happen.

2. Onboarding




3. Orienting



4. Engaging





Personal ownership is powerful.
Especially when it comes to
board service.

5. Renewal



Board Engagement



Involve



Invest

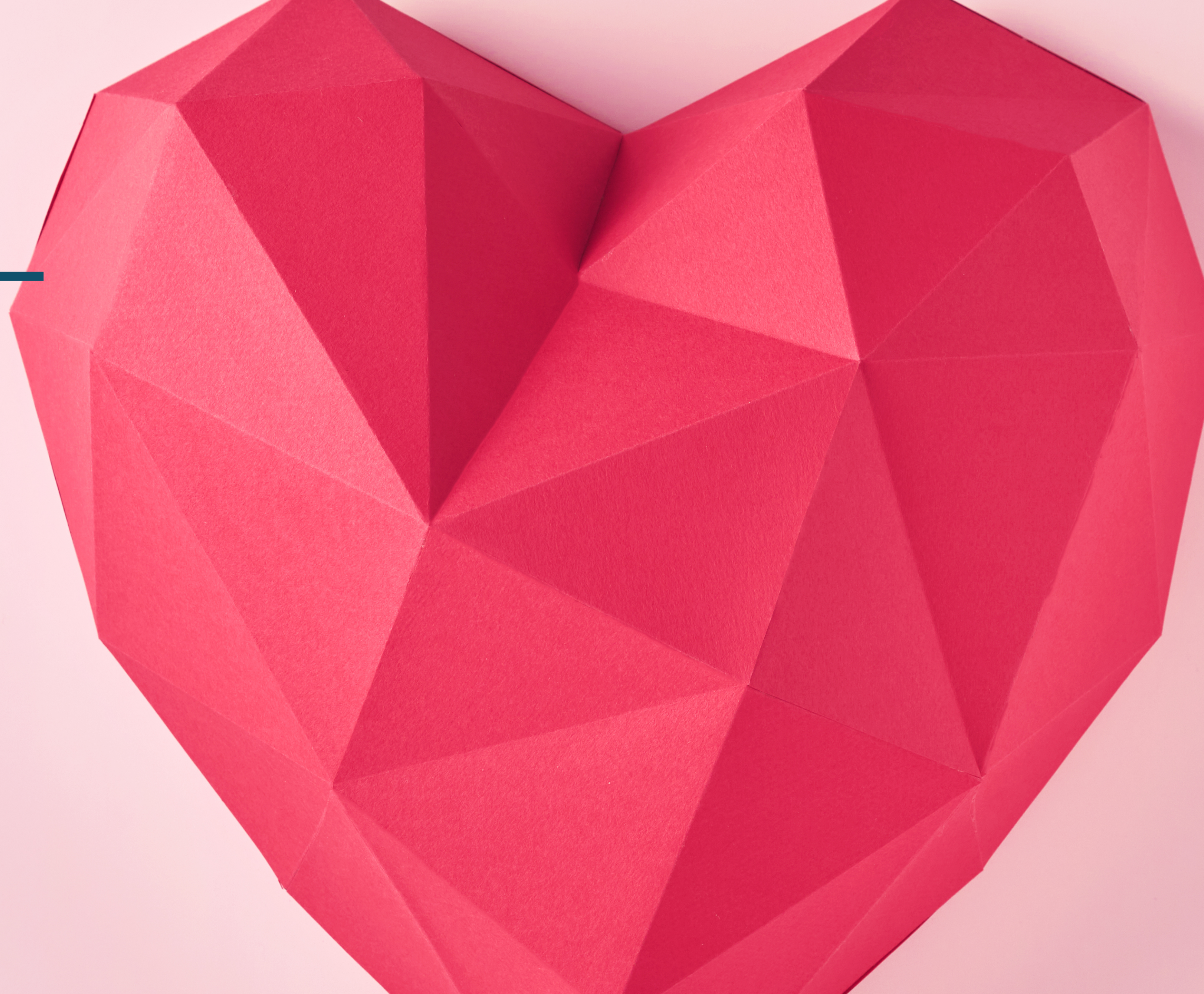


Influence

Involve



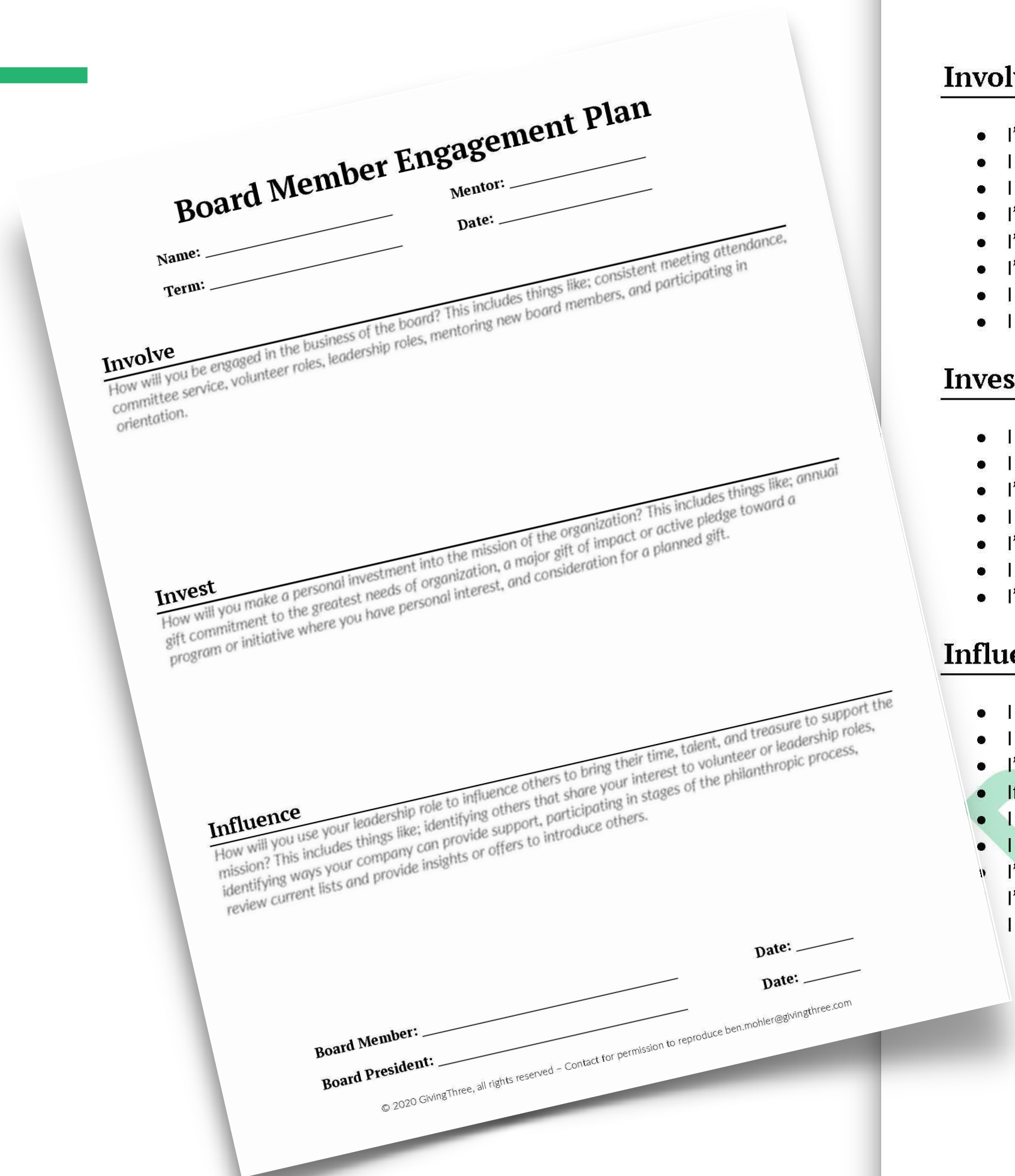
Invest



Influence



Workshop



Board Member Engagement Plan

Name: _____ Mentor: _____

Term: _____ Date: _____

Involve

- I'll attend all four annual board meetings each year.
- I want to serve on a board committee and attend all scheduled meetings and calls.
- I want to serve as a mentor to a new board member (after at least one year on the board).
- I'm interested in chairing the XYZ committee (after one or two years on the board).
- I'm interested in serving as a board officer this year or next year.
- I'd like to move to a new committee next year.
- I would really like to work on revising the confidentiality policy, can I help lead a task force to solve this?
- I don't have an interest in chairing any committees, but I'm willing to serve on two committees.

Invest

- I commit to making an annual gift of \$1,000 toward the area of "greatest need."
- I commit to making an annual \$500 challenge matching gift for new donors giving to the "XYZ program"
- I'd like help setting up a monthly gift draft through my bank/credit card.
- I need help setting up the organization as a beneficiary of my donor advised fund.
- I'm interested in establishing a \$25,000 pledge toward XYZ program and fulfilling the pledge w/in 5 yrs.
- I included you in my estate plans and need to document that commitment (estimate of \$50,000)
- I'm interested in designating you as the secondary beneficiary in my (insurance policy/trust).

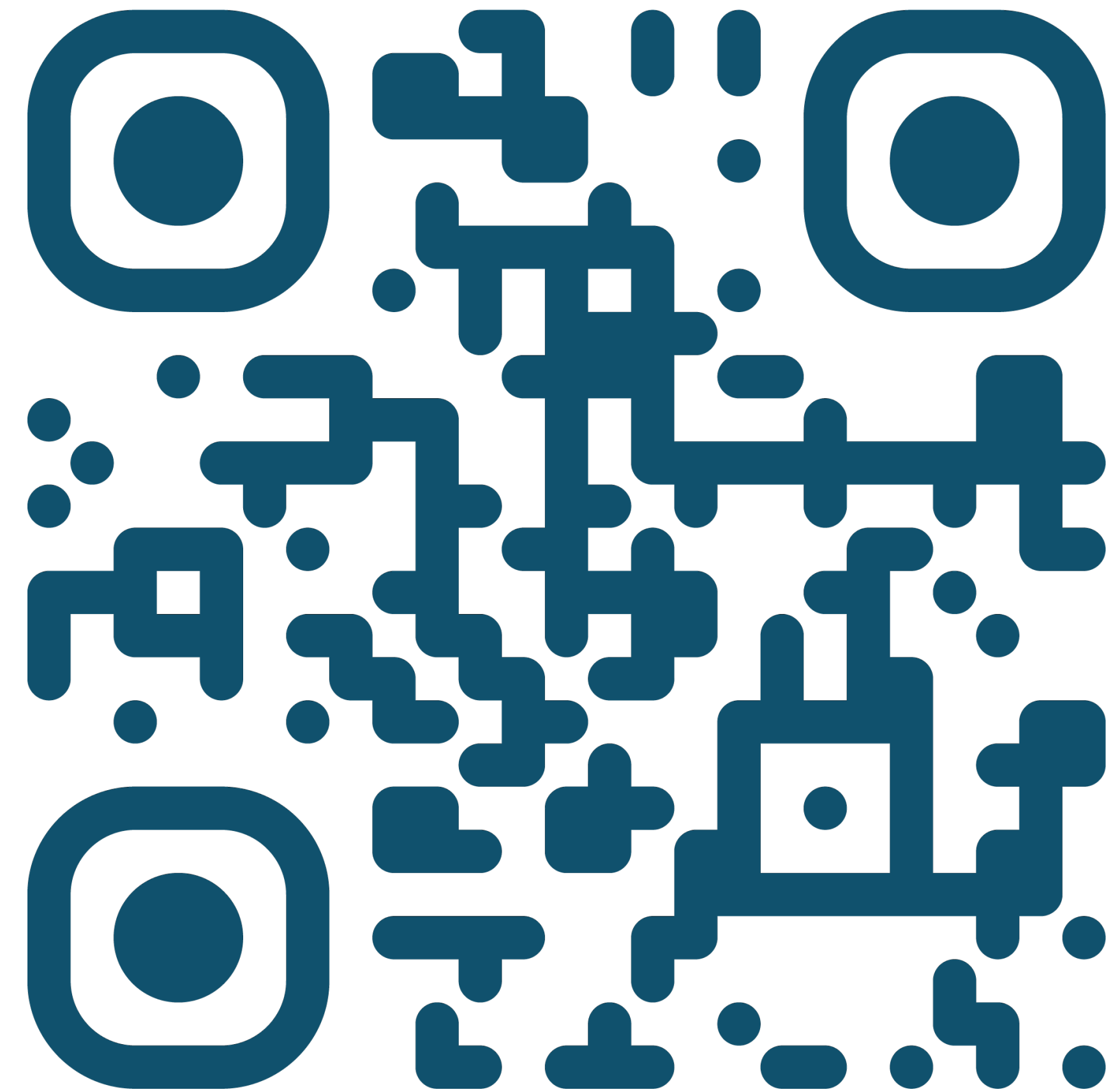
Influence

- I want the staff to provide me at least three opportunities each year to share my giving story in person.
- I would like to have the opportunity to make thank you phone calls or write notes to new donors.
- I'm interested in participating in a review of active donors to help identify potential board members.
- If staff identify a potential donor that I may be connected to, I'm willing to introduce or arrange a visit.
- I want to work on a plan for my employer to make a gift to the XYZ program.
- I want to help connect my employer with the development team to plan a workplace volunteer effort.
- I'd like to host a dinner party at my home or a reception at my club to recruit volunteers and/or donors.
- I'm willing to share how the mission of the organization impacted my life for one of our outreach events.
- I REALLY want to participate in a REALLY BIG ask with an individual or company (seriously).

Board Member: _____ Date: _____

Board President: _____ Date: _____

Resources



<https://bit.ly/BBBAZ>



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