

ORGANIZATION NAME

Board Member Engagement Plan {YEAR}

OVERVIEW

As a member of ORG NAME Board of Directors, you are making an invaluable commitment to ORG NAME'S future. Your time and energy are significant resources and will help shape ORG NAME'S strategic direction and achieve its operational and financial goals.

The purpose of this document is to solidify your commitment of time and financial support to ORG NAME & TIME PERIOD. This process is designed to allow board members to consider their annual giving carefully and allow staff to consider this information as we build our fundraising plan. By completing the below YEAR Individual Development Plan you are making a written commitment of how you will participate in ORG NAME fundraising efforts and committee structure during this next year.

We ask that you carefully review this document and consider your plans for giving and engagement prior to meeting with staff and Board Chair in MONTH to review and complete this document. If you have questions, please don't hesitate to contact NAME at EMAIL or at PHONE.

TIME COMMITMENT

When you become a board member you are making a commitment to ORG NAME to be an active participant for NUMBER years which is the length of a term. Members have the opportunity to be re-elected to serve a second term after successfully completing their first term. The maximum length of service is two consecutive terms. The Board of Directors meets monthly on DATE, TIME and COMMITTEES meet DATE, TIME. Including board and committee meeting preparation the average monthly time commitment for a board member is # HOURS.

COMMITTEE SERVICE

Committee service is central to the Board of Directors overall responsibility. Committees ensure key functions of ORG NAME are coordinated with the overall goals and strategic direction of the organization. Like attendance at full Board of Directors meetings, committee attendance and participation are critical to the organization achieving its goals.

I am interested in serving on the following committee/s:

___ Finance

___ Program

___ Governance

PERSONAL INFORMATION

Name/Preferred Pronouns

Spouse/Partner Name

Address

City

State

Zip

Occupation

Employer

Cell

Email

DEMOGRAPHIC INFORMATION

It is important both to our organization and our funders that our board is a representation of the community we serve. Filling out the information below helps us ensure that we stay true to this value.

Date of Birth

BIPOC

Gender (Gender Expansive, Male, Female, Other)

Identify as a person with a disability

PERSONAL GOALS

Board service can provide a great opportunity to pursue personal and professional goals, including the acquisition of new skills. Board Members are invited to reflect on any personal or professional goals that they would like to achieve while serving on the board, or any new experiences they would like to have. Some examples might be graphic design, networking, fundraising, grant-writing, web design, etc. These could be in the form of professional development training, opportunities to partner with someone who has these skills (e.g. help bring a graphic designer into our organization), or learning these skills on your own.

List some personal or professional goals that you would like to meet/work towards while serving on the board.

Goals:

PERSONAL FINANCIAL SUPPORT

Studies of successful nonprofit organizations clearly indicate that board member financial support is a critical indicator of the financial well-being of the organization. ORG NAME Board Members are each expected to make an annual financial contribution. There is no minimum amount; we ask that you consider an amount that represents a significant gift to you and is one of the top three charities you support. ORG NAME has several opportunities for board members to participate financially.

ANNUAL FUND CONTRIBUTION

My FY?? personal pledge: \$ _____

I will pay my pledge:

___ in one payment, to be received by _____

___ in installments of _____, to be received by _____

___ I would like to be a sustaining supporter with a monthly gift of _____

FUNDRAISING EVENT

Our annual fundraising event will be held this year at DATE and LOCATION. Our hope is that all board members will attend the event and use this as an opportunity to introduce others to our organization.

___ I would like to sponsor a table of ten! (\$_____)

___ I would like to purchase ___ tickets! (\$_____ per ticket)

___ I would like to help secure sponsorship from my employer or another business

___ I would like to donate an item or package to the live auction

___ I will give a gift of \$_____ during the special appeal

A gift for ORG NAME'S future

As we work to build long term stability, we are expanding our Planned Giving Program.

___ I have already made provisions in my estate plan to support ORG NAME

___ I would like additional information about making a planned gift

___ I am not interested in considering a planned gift at this time

Other Ways to Support

Peer-to-peer fundraising. Uses social media to encourage your friends, family, and colleagues to support the great work of ORG NAME and is an excellent way to help us grow our base of support. Staff can help you craft your campaign.

___ I will host a peer-to-peer fundraising campaign

Thank donors and supporters. These easy calls and notes build a stronger connection between the organization and our donors. This is an opportunity to thank donors for their support, answer questions they may have, and learn more about why they support ORG NAME.

___ I would like to make thank you calls

___ I would like to send personal thank you notes

Host a stewardship event. ORG NAME is considering launching a series of stewardship events throughout the year. Would you be willing to host a stewardship reception in your home or business?

___ I would like to host or co-host a stewardship event

Attend Events and Community Programs. Board presence is invaluable at programmatic events. You can contact NAME at EMAIL for more information on upcoming events.

Thank you so much for your leadership and support! This engagement plan is an essential component of our work together and our organizational growth.

I agree to fulfill my pledge as stated above and to carry out the above-stated fundraising and organizational goals in FY?? to the best of my ability.

Signature

Date