2014 “Menu of Choices”

**Board Member Activities in Fund Development**

**Annual Commitment Form**

At the start of each fiscal year, Board members complete this form, agreeing to carry out various fund development activities. Typically staff or a member of the board helps negotiate items on the commitment form.

Every year, all Board members give a personal financial contribution to the best of personal ability. In addition, each Board member selects at least three items from the *Menu of Choices* below.

Staff provides guidance and direction, training and support to carry out these activities. Board members report results to staff in a timely manner.

**Relationship-Building Activities**

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|  | 1. **Make thank-you calls to donors.** On average quarterly with 5 – 8 calls each time. Complete within three weeks. You don’t need to know the person you’re calling.
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|  | 1. **Hand-write brief thank-you notes to donors.** On average quarterly with 5 – 8 notes each time. Complete within three weeks. You don’t need to know the person you’re writing. The office sends out the official thank-you letter upon gift receipt.
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|  | 1. **Invite friends/colleagues to get to know the organization better** through various activities, e.g., programs, insider updates, fundraising events, etc. Follow up personally (not to ask for money) to evaluate interest. 2 – 3 times per year.
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|  | 1. **Host a relationship-building gathering** (e.g., house party, gathering at your office or club, etc.) Once during the year. You can do this in partnership with someone else, too.
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|  | 1. **Participate in nurturing a relationship with a particular donor** by carrying out specific activities directed by staff. 1 – 2 donors during the year.
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|  | 1. **Interview donors to collect their stories.** Staff provides the questions. You schedule and conduct the interview, and write up the story. 1 – 2 donors during the year.
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**Solicitation Activities**

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|  | 1. **Write brief personal notes on direct mail letters.** You don’t need to know the person. 1 – 2 times during the year on 20 or so letters.
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|  | 1. **Personally, face-to-face, ask for gifts from selected donors/qualified prospects.** Do this alone or in partnership with staff or another board member. 3 – 5 during the year.
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|  | 1. **Join staff to meet with foundation/corporate representatives** to talk about the Forum. 2 – 3 times during the year.
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**Other**

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|  | 1. **Serve on the Fund Development Committee,** which meets approximately 4 – 6 times per year. Provide leadership, support, and follow-up to the Board and its individual members.
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Board member signature and date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_