Annual Board Fundraising Expectations - Sample

As proposed by ORG’S Board Development Committee and approved by the full Board, the following are expectations for your Fiscal Year 2017 fundraising roles and responsibilities as a Board member.

FY17 Board Goal: $50,000 ($25,000 individual gifts; $25,000 special events)

Required Activities:

✓ Attend and personally invite at least 1 potential donor to at least 1 ORG fundraiser.

✓ Make an annual cash donation within the first month of the fiscal year in an amount that is personally meaningful.

✓ Write a personal note on at least 20 hard copy appeal letters.

✓ Follow up with a handwritten thank you card to any of the 20 who provide a donation.

✓ Follow up with a phone call (and handwritten card) to any of the 20 who provide a donation of $200 or more.

✓ Commit to memory the ORG “elevator pitch.”

Additional Activities (select at least 2):

☐ Speak about ORG at at least 1 community or business event.

☐ Host or co-host a house party fundraiser.

☐ Invite at least 1 major donor prospect to attend a coffee meeting with CEO and yourself.

☐ Recommend 1 person to join the Board or a Board committee.

☐ Provide at least 5 names with contact information to be added to the Annual Appeal mailing list.

☐ Join the Development Committee.

_______________________________  ______________________
Signature                           Date

_______________________________
Print Name

K. Weill Consulting Group, LLC