

Board Campaign Strategy + Decision Booklet Plan

Ensuring that you have 100% participation from your Board of Directors in contributing to your capital campaign is a vital step in your campaign fundraising. Not only might board members be significant donors, having 100% participation means (1) the board is fully invested and engaged in the campaign and (2) it signals an important message to other donors and foundations

You might be wondering when a board campaign fits into campaign fundraising timing. You'll want to solicit your board campaign gifts alongside your lead gifts during the Quiet Phase of the campaign.

The way you go about soliciting your board will make a huge difference in how they feel about the campaign. You do not want to just drop a pledge form in their board packet and think your job is done.

Board Campaigns require a six-step process:

1. Organize a small Board Campaign Task Force team
2. Assess board giving potential + set a board giving goal
3. A group Board Resolution of Support signed by all board members
4. Develop a Board Decision Booklet you can personalize for each board member
5. Solicit every board member personally using personalized Board Decision Booklet
6. Celebrate the success of the Board Campaign + 100% Board participation

Board Campaign Decision Booklet + Solicitation Plan

It is important that you personalize your ask to each Board member, in accordance with your board giving assessment. An intentional pair of solicitors will meet with each board member in person to discuss their financial commitment to the campaign. The pair might be two members of the Board Campaign Task Force, or it could be one Board Campaign Task Force member with the Executive Director or Development Director as an example.

A Board Campaign Decision Booklet will be mailed in advance of the meeting for their review, and a copy will be used during the meeting as well.

Components to include in your Board Decision Booklet

- Proposal letter written to board member (and spouse/partner)
- Case for support
- Outline of board giving goals
- Gift range chart
- Naming opportunities list
- Options for payment plans on multi-year pledges
- Information about securities + non-cash/asset-based giving
- Intent to Give/Pledge form



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