

## Board Fundraising Role Exercise

### Introduction

Board members bring expertise, influence, and passion that can greatly strengthen your ministry's fundraising results and mission impact. Their active engagement—through their own personal giving and through their networks—is vital to achieving your goals.

Most Boards expect their members to give personally as well as help raise funds from others. Many organizations now recognize the need to rethink how Board members contribute overall to building a strong culture of philanthropy. There are many ways board members can help fundraise for a ministry, even without asking others for a gift! Success will come from clear expectations, strong communication, and staff support that helps equip them to fulfill their roles well.

This exercise can help each Board member find an important role to play which best fits their unique set of skills, talents and giftings. It will not only help remove the fear of fundraising but, while making the best use of their time and service, may help generate a joy of generosity.

There are four known types of board members governing most nonprofits generally, and each type has abilities to contribute some form of effective fundraising. The 4 types are *Connector*, *Storyteller*, *Visionary* and *Closer*.

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## Instructions

1. Read each of the 4 *Type* descriptors carefully, along with the accompanying *Activity* list.
2. On the next page please indicate which *Type* (or types) best fits your unique style. Or...
3. If you feel no *Type* fits you, use the "Other" option and indicate what else you can do to help.

	<b>Type</b>	<b>Activity</b>
<b>Connector</b>	<p><b>Connectors</b> are board members with amazing networks. They enjoy connecting the network with their passion and could easily fill an event table or bring friends in for a site tour. Their network is comprised of the right prospects (corporate, foundation, city, county, church and individual) and they can open doors when needed. However, just because they know the right people does not mean <b>Connectors</b> feel comfortable asking for gifts.</p>	<ul style="list-style-type: none"> <li>• Bring a group for a site tour</li> <li>• Host a table (or two) at your event</li> <li>• Call and thank donors for their gift</li> <li>• Write personal 'thank you' notes</li> <li>• Launch a social media fundraiser</li> <li>• Host a gathering at their home</li> <li>• Chair an event</li> <li>• Review prospect lists</li> <li>• Make introductions for development</li> <li>• Serve on the Board Development Committee</li> </ul>
<b>Storyteller</b>	<p><b>Storyteller</b> board members can articulate the mission and its impact beautifully. They have great enthusiasm and can tailor their messages based on their audience. They bring listeners along a vulnerable, truthful, and trustworthy journey. Although they can move others emotionally, <b>Storytellers</b> do not always feel comfortable asking for gifts.</p>	<ul style="list-style-type: none"> <li>• Speak at an event (large or small)</li> <li>• Review print/digital solicitations</li> <li>• Film a video for the website</li> <li>• Go on a cultivation visit (no Ask)</li> <li>• Write a newsletter article or blog</li> <li>• Attend site tours and offer commentary</li> <li>• Call and thank donors for their gift</li> <li>• Write personal 'thank you' notes</li> <li>• Serve on the Board Development Committee</li> </ul>
<b>Visionary</b>	<p><b>Visionary</b> board members help you see what the future of the organization could look like. They bring creativity, imagination and wisdom, and should be engaged when it comes to strategic planning and capital campaign discussions. They might provide helpful feedback to your fundraising plan. This type is gifted at thinking about the organization's future, yet <b>Visionaries</b> may not be comfortable asking for gifts.</p>	<ul style="list-style-type: none"> <li>• Participate in strategic planning</li> <li>• Review the fundraising plan</li> <li>• Review stewardship marketing pieces</li> <li>• Help write print/digital solicitations</li> <li>• Serve on the Board Development Committee</li> </ul>
<b>Closer</b>	<p><b>Closers</b> are your solicitors! They do not shy away from the 'Ask' and can be taken on solicitations. They are influential. They like meeting new people and can have deep, meaningful conversations that demonstrate their connection to the organization. If they personally give to the ministry, <b>Closers</b> can speak firsthand as to why they give.</p>	<ul style="list-style-type: none"> <li>• Attend solicitation appointments</li> <li>• Review donor prospect lists</li> <li>• Solicit corporate sponsorships</li> <li>• Make the 'Ask' at an event</li> <li>• Sign solicitation letters</li> <li>• Serve on the Board Development Committee</li> </ul>

## Instructions

1. Please circle below which *Type* or types best fits your unique style! Or...
2. If you feel no *Type* fits you, please use the "Other" option and indicate what else you can do to help!

When board members function in their respective roles, these fundraising tasks can seem effortless and enjoyable for each member. Instead of the organization's President or one board member trying to do it all, here is an example how multiple board members can each play their unique role at the same event.

At a small gathering of donor prospects at someone's home, the **Connector** can be a great host for the event, making sure each attendee feels welcomed. The **Storyteller** can share in a meaningful, heart-felt way about someone who recently benefited from the ministry's impact. The **Visionary** can articulate a future picture of what greater impact could look like if only more funding was provided. The **Closer** can then invite those in the room to consider a meaningful and significant new commitment to the mission.

**I believe this *Type* (or types) comes closest to my style and preference to help:**  
(circle one or more)

**Connector**

**Storyteller**

**Visionary**

**Closer**

**Or...indicate below what else you can do to help with fundraising:**

**Other** \_\_\_\_\_

\_\_\_\_\_

**Name** \_\_\_\_\_