# Individual Board Member Fundraising Agreement Template

*This revisable template is provided by* [*The Board Doctor, LLC*](https://theboarddoctor.org/)*.*

[Name of Organization] is developing a plan to raise $X in [year] to support projects, programs, and operations. We need all hands on deck to be successful. Below is a list of tasks associated with our plan where board member involvement is critical. Please check which items our team can rely on you for and sign below.

**→Identify potential donors.** Board members can review lists of current and potential supporters and identify individuals they know or know something about.

\_\_\_\_\_ I will review lists of supporters to help identify potential donors.

**→Provide a list of personal contacts for donor cultivation and solicitation.** Integrating your contacts into our donor contact system will allow us to determine the best strategy for each. [Staff] will work one-on-one with each board member to review each prospect and determine the best manner of approach.

\_\_\_\_\_ I will provide a list of personal contacts to pursue as donors.

**→Participate in donor meetings**. Many of our requests to major donor prospects include face-to-face meetings. Board members play a key role in these meetings.

\_\_\_\_\_ I will make contact with potential donors I know and request meetings.

\_\_\_\_\_ I will attend donor meetings.

**→Help us thank recent donors.** This program involves calling donors just to say “thank you” for their support, answer any questions they may have, and learn more about the donor. You will be asked to report anything you learn for adding to our database.

\_\_\_\_\_ I will make thank you calls to donors and supporters.

\_\_\_\_\_ I will write thank you notes or put personal notes on thank you letters.

**→Host a House Party or invite a friend to host a House Party.** House parties are used to educate our friends and donors about [Name of Organization] and its mission. It is also an opportunity to raise money. By hosting a party, you underwrite the cost of food and drink and open your home to invited guests.

\_\_\_\_\_ I will host a House Party by [date].

\_\_\_\_\_ I will recruit a colleague/friend to host a House Party by [date].

**→Participate in organizing fundraising events.** Board members are needed to help plan, support, and promote our fundraising events.

\_\_\_\_\_ I will sponsor at least one fundraising event.

\_\_\_\_\_ I will solicit sponsorships for at least one fundraising event.

\_\_\_\_\_ I will bring two or more guests for at least one fundraising event.

\_\_\_\_\_ I will obtain or contribute silent auction items for at least one fundraising event.

**→Planned giving.**

\_\_\_\_\_ I will name [Name of Organization] in my will or provide another planned gift.

\_\_\_\_\_ I will help identify planned giving prospects and help cultivate them.

**→Personal gift.**

**\_\_\_\_\_**I will give $X on a monthly basis effective [date].

\_\_\_\_\_I will make an annual gift of $X by [date].

\_\_\_\_\_I would like to be invoiced for $X on [date].

Other things I can do:

Signature of Board Member: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_

| This document was created by Cathy Allen of The Board Doctor, LLC and is intended for groups to use as a template, making changes according to their own fundraising plans. More information is available online at [www.TheBoardDoctor.org](http://www.theboarddoctor.org) and through LinkedIn and Facebook. Call Cathy directly at 321-848-7320 or email Cathy@TheBoardDoctor.org.A picture containing person, outdoor, person, purple  Description automatically generated |
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