

PART I: GENERAL QUESTIONS

1. What do you hope to gain from your experience on the Board this year?
2. What resources and/or knowledge do you need to achieve your goals as a board member and have a meaningful board experience?
3. What do you need to be a confident ambassador/advocate for this organization?
4. What do you like best about serving on the board? What is something you would like to see changed?

PART II: TIME/TALENT

Please share how you would like to exercise your time and talent as a board member in this section.

Will you make a reasonable effort to participate in (X) board meetings each year, either in person or electronically; as well as a possible annual retreat and board holiday party? Do you foresee any challenges with participating in board meetings?

Participation on at least one board committee is required. Circle the one(s) you are interested in:
Executive; Finance; Development; Marketing and Events; Policy and Governance; Advocacy; Inclusivity, Diversity, Accessibility and Equity (IDEA); [Others]

Are there areas of leadership that you would like to pursue? Please mark all that apply.
_____ Chair a Board Committee
_____ Serve as an officer (Chair, Vice Chair, Treasurer and/or Secretary).

Do you have specialized expertise that you would like to provide through your board service or as an in-kind donation? Please explain:

You can participate in our many programs by hosting, volunteering, presenting, attending, etc. Check all that apply and explain how you'd like to participate.

- _____ **Program one:** [description]
- _____ **Program two:** [description]
- _____ **Program three:** [description]
- _____ **Program four:** [description]
- _____ **Program five:** [description]

PART III: TREASURE

[Name of org] relies on the generosity and financial contributions of its board members to sustain programmatic and operational functions. The treasure you contribute may include individual donations, corporate sponsorships, membership, and table/ticket purchases.

[Org name] membership is a board requirement. Are you or is your company a current Member? At what level?
\$ _____

The board has a collective goal to contribute [\$amount] through individual board gifts in the coming year. Please share your personal goal for giving. As you consider a personal donation amount, we hope you will put [Org name] in your top three philanthropic endeavors.
\$ _____

When and how do you plan to make your personal gift(s) (e.g. monthly giving, one time donation, company match)? Date: _____

How would you like your contribution(s) to be designated (please circle one)?

For the general operating fund

[Additional fund names]

[Potential to include additional programs/ways to get financially involved]

Will you purchase a table or ticket(s) to our events?

\$ _____

Will you or your company sponsor a program? If yes, explain.

\$ _____

Does your company provide foundation funding that we could apply for?

If yes, explain.

\$ _____

Total Anticipated Financial Contributions:

\$ _____

PART IV: TIES

The connections and introductions you bring to our organization are vital to the organization's fundraising efforts and helps grow an inclusive circle of members and friends. Consider your current social and professional networks/ relationships and how those can be a part of your individual engagement plan.

What other boards and committees are you on? How might you see your work there intersecting with work here?

Please explain how you would like to solicit new members or supporters of our organization. Identify the prospects, actions, and frequency:

Prospect names & Contact Information:

Actions (check all that apply and indicate frequency):

_____ Facilitate an e-mail introduction

Frequency/date:

_____ Set up a lunch or coffee meeting

Frequency/date:

_____ Invite prospect to an event

Frequency/date:

Please explain how you would like to solicit new individual donors for the organization. Identify the prospects, actions, and frequency:

Prospect names & Contact Information:

Actions (check all that apply and indicate frequency):

_____ Facilitate an e-mail introduction

Frequency/date: At least four from myself, and whenever needed beyond that

_____ Set up a lunch or coffee meeting

Frequency/date:

_____ Invite prospect to an event

Frequency/date:

Will you assist in identifying, soliciting or obtaining program and/or event sponsors?

Yes/No; explain:

Will you help recruit and/or identify new Board Member prospects? Consider our goals around diversity, equity, inclusivity and accessibility. Yes/No; explain:

Will you recruit and/or identify new non-board Committee Members prospects? Yes/No; explain:

Will you host a fundraiser or cultivation event (e.g. home party, cultural outing, or reception before a member event)?
