

## Individual Board Member Engagement Plan

This worksheet has been designed to help each X (X) board member in identifying ways to contribute to the organization in ways that best utilize each board members skills and experiences. While some board responsibilities are required for all board members, this worksheet will help identify ways that you can help advance the X mission in a way that best matches your interests, skills, and expertise.

I, \_\_\_\_\_, bring the following skills and experience to X:

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Based on my commitments to the organization and my unique skills and experience, I will commit to the following activities for X to meet my commitments to the organization and help advance the organization's mission over the next year.

### Board Participation – All required

Attendance at least 80% of board meetings and board activities	X
Membership and participation on at least one committee	X
Participate as a paying member or volunteer for at least half of the organization's public events	X

### Leadership

Serve in an officer position/member of the executive committee - which position?	
Serve as a committee chair - which committee?	

### Community Outreach and Serving as an X Ambassador Select at least three (including the required option)

Formally tell ___ people about the organization and contribute their contact information to X mailing list for e-newsletter list or other electronic communications	
Contribute an article about my involvement in the organization for the e-newsletter or website	
Speak on behalf of the organization at ___ community events Including:	



Recruit ___ people from my personal network to volunteer for the organization	
Commit to regularly sharing information about X through your social media activities, like Facebook, Twitter, and Linked In	
Forward the X e-newsletter to ___ people each month	
Meet the cocktail party and grocery store test – When you talk about your community involvement, X is at the top of your list	X
Other:	

**Fund Development – Select three to five items (including the required option)**

Make an annual personal contribution (required). Amount: \$_____	X
Make an annual personal contribution ensuring that X is a top personal philanthropic priority. Amount: \$_____	
Solicit a matching gift or sponsorship from my employer.	
Solicit a gift from your service club, professional organization, or religious institution.	
Host a small fundraising or educational event about X in my home or for my circle of contacts. Ideas include:	
Host a table at event	X
Ask friends or family members to host a table at event	
Contribute or solicit in-kind donations, including: • • •	
Make connections with and personally solicit professional and personal contacts to help X generate revenue. Ideas for this year include: • • •	
Participate in fundraising meetings (donor visits, site visits, or other in-person fundraising activities). Ideas for this year include: • • •	
Add ___ people to the direct mail solicitation lists and follow-up with those individuals to encourage donations.	



Ask friends and family to designate honorary gifts for an event in my life (birthday, anniversary, baby shower, wedding, or similar event).	
Make a formal planned gift to X	
Make monthly thank you calls or write personal thank you notes to donors.	
Make donations to X in lieu of holiday gifts for family members and friends.	
Make donations to X in lieu of holiday gifts (like fruit and gift baskets) for colleagues and clients.	
Choose X to be your company or office's charitable cause for the holidays and collect donations or create small giving trees to benefit X participants.	
Set up a personal match campaign (for example, pledge to match up to \$1,000 for donations from your friends and family)	
Hosting a donor recognition event at your home or office	
Other Ideas:	

### **Fiduciary and Financial Oversight – all required**

Review and understand financial statements as they are submitted to the board (required)	X
Stay familiar with the organization's bylaws and operating procedures (required)	X
Sign a conflict of interest statement one time per year and disclose all potential conflicts in advance to the board of directors (required)	X
Serve as a member of the board in a manner that promotes the best interests of the organization	X
Other Ideas:	

### **Committee Activities**

Actively participate on at least one committee.	X
Which committee? •	
Participate in at least 80% of committee meetings and activities	X
I will contribute to the committee's success this year by:	X
Other:	



<b>Other ways I will support the organization</b>	
Participate in other board activities, like strategic planning and board assessments	X
Facilitate an educational session for board members on my area of expertise as relevant to the organization's mission (for example, a CPA could provide an overview of how to read a financial statement)	
Host a social event for the board and staff in my home	
Assist in the board recruitment process	
Other:	
Other:	
Other:	

