



THE BOARD GIVING PLAYBOOK

Turning Board Members Into Champions for Your Mission

A practical Donor Success framework for moving board engagement beyond attendance and into giving, access, cultivation, and advocacy.

Grow Donors. Grow Giving. Grow Impact.

Your board can be one of your greatest donor-growth assets.

Too many boards are measured by one question: Did they attend the meeting?

Attendance matters. Governance matters. But if your board believes in the mission, their value can reach far beyond the boardroom.

Board members bring relationships, credibility, lived experience, community access, professional networks, influence, and a personal connection to the work. The goal is not to turn every board member into a professional fundraiser. The goal is to give every board member a clear, comfortable way to help strengthen the relationships that fund the mission.

Your board doesn't need 20 professional fundraisers. You need 20 people who believe deeply enough in the mission to give, open a door, build a relationship, and tell somebody why the work matters.

This playbook gives nonprofit leaders a practical way to activate that potential.

Stop asking every board member to fundraise the same way.

One of the fastest ways to shut down board engagement is to make fundraising feel like a job they never signed up for.

Some board members will confidently make an ask. Others will never be comfortable doing that - and they can still be incredibly valuable to donor cultivation.

Donor Success starts by broadening the definition of board participation.

Not just: Make the ask Also: make an introduction, host a conversation, thank a donor, share a story, invite someone to experience the mission.	Not just: Give or get Also: give meaningfully, create access, deepen trust, and advocate for the organization.
Not just: Annual campaign Also: consistent relationship-building throughout the year.	Not just: Development staff's job Fundraising is staff-led, but mission advocacy can be board-powered.

The question isn't: 'Will every board member solicit gifts?'

The better question is: 'How will every board member help move relationships forward?'

The Donor Success Board Engagement Model

STEP	ROLE	WHAT IT MEANS
1	GIVE	Personally invest in the mission at a level that is meaningful to the board member.
2	OPEN DOORS	Create access to people, companies, foundations, and relationships the organization should know.
3	CULTIVATE	Help deepen relationships through gratitude, connection, experiences, and intentional touchpoints.
4	ADVOCATE	Tell the story of the mission with confidence when the organization is not in the room.

A healthy board does not need to perform every role equally. But across the board, all four roles should be covered intentionally.

GIVE

Belief starts with personal investment.

Board giving is not about requiring every member to write the same size check. It is about 100% participation and meaningful personal investment. When board members ask others to believe in the mission, they should be able to say they believe enough to invest themselves.

Set the expectation early Include a clear board giving expectation during recruitment and onboarding.	Make it meaningful Ask for a personally significant gift, not a one-size-fits-all amount.
Give options Annual gift, monthly giving, campaign support, matching gifts, or other approved pathways.	Celebrate participation Focus first on commitment and participation before comparing gift size.

Board giving creates credibility. It tells donors, funders, and the community: the people closest to this mission believe in it.

OPEN DOORS

Relationships are often more valuable than Rolodexes.

Board members know people your development team may never reach on its own. Their job is not to hand over a contact list. Their opportunity is to create warm, mission-aligned access.

Map relationships Identify people, companies, civic groups, foundations, and communities each member can authentically reach.	Make warm introductions A short email, coffee introduction, event invitation, or personal connection can change everything.
Protect trust Never treat a board member's network like a cold prospect list.	Start with fit Prioritize people whose interests naturally connect with the mission.

A warm door opened with trust is worth more than a hundred cold names in a spreadsheet.

CULTIVATE

Board members can help build trust without making the ask.

Cultivation is where many board members can shine. Give them specific, human actions that move a donor relationship forward.

Thank-you calls Assign donors for short, genuine gratitude calls with no ask attached.	Mission experiences Invite prospects or donors to tours, events, programs, or impact conversations.
Personal follow-up A board member can send a note after an event or meaningful donor interaction.	Host small conversations Coffee, dinner, or a small gathering can create deeper connection than a large event.

The goal of cultivation is simple: help the donor feel known, connected, and confident that their generosity matters.

ADVOCATE

Your board should know how to tell the story when staff are not in the room.

Advocacy turns board members into everyday champions. They do not need a memorized pitch. They need clarity, confidence, and a story they can make their own.

Know the mission in one sentence Every member should be able to explain who you serve, what changes, and why it matters.	Carry one impact story Give members a current story that makes the mission real.
Know the invitation What should someone do next - visit, volunteer, meet, give, or learn more?	Keep them equipped Provide simple talking points, current impact numbers, and regular wins.

If your board cannot confidently explain why the mission matters, the community cannot benefit from their influence.

Board Engagement Scorecard

Use this simple scorecard quarterly. The goal is not to shame board members. The goal is to make expectations visible and identify where support is needed.

AREA	0	1	2	3
Give	No gift	Commitment made	Gift made	Gift + additional campaign support
Open Doors	No introductions	1 potential connection identified	1 warm introduction	Multiple qualified introductions
Cultivate	No activity	1 assigned touch	2+ donor touches	Hosts/joins meaningful cultivation
Advocate	Not active	Shares content	Invites others	Actively champions mission

Suggested interpretation: 0-3 = needs activation | 4-7 = participating | 8-10 = engaged | 11-12 = board champion

Track trends over time. A board member moving from 3 to 7 is progress worth recognizing.

Relationship Mapping Exercise

Use this exercise in a board meeting or retreat. Give members 10-15 minutes to think through relationships by category - without asking them to surrender their contact lists.

CATEGORY	WHO COMES TO MIND?	WHY MIGHT THEY CARE?	BEST NEXT STEP?
Business & Corporate			
Philanthropy & Foundations			
Civic & Community			
Faith & Membership Groups			
Friends & Personal Network			
Former Donors / Alumni / Volunteers			

The goal is not to collect names. The goal is to identify natural pathways to relationship.

A Simple Monthly Board Engagement Rhythm

Board engagement becomes easier when it is built into the operating rhythm instead of saved for campaign season.

WEEK 1 - Equip Send one mission win, one impact story, and one current organizational priority.	WEEK 2 - Activate Assign or offer one simple action: thank a donor, make an introduction, invite someone, or follow up.
WEEK 3 - Connect Development staff check in with members who have active relationships or assigned cultivation.	WEEK 4 - Celebrate Share what happened: introductions made, donors thanked, meetings held, gifts influenced, stories shared.

At each board meeting, reserve 10 minutes for donor relationships. Ask:

- Who did we thank?
- Who did we introduce to the mission?
- Which relationships moved forward?
- Where do we need help?
- What is one action each of us can take before the next meeting?

START NOW

30-Day Board Activation Plan

Days 1-7	ALIGN	Confirm board expectations, giving participation, and the four engagement roles. Identify what is comfortable for each member.
Days 8-14	MAP	Complete the relationship mapping exercise. Prioritize warm, mission-aligned connections rather than raw volume.
Days 15-21	ACTIVATE	Assign simple actions: thank-you calls, introductions, invitations, follow-up notes, or cultivation meetings.
Days 22-30	REVIEW	Celebrate movement, capture activity, remove friction, and agree on the next month's actions.

Do not wait for the perfect board fundraising strategy. Start by creating one meaningful action for every board member.

MAKE THE NEXT STEP PERSONAL

Board Member Commitment Card

Complete this individually, then share the commitments that need staff support.

MY COMMITMENT	MY NOTES
I will personally GIVE to the mission by...	
I can OPEN A DOOR to...	
I will help CULTIVATE by...	
I will ADVOCATE for the mission by...	
The support I need from staff is...	
My next action and date...	

Put Your Board to Work for the Mission

A strong board engagement strategy is not about turning volunteers into salespeople.

It is about helping people who already believe in the mission participate in the relationships that make the mission possible.

Start small. Make expectations clear. Give board members meaningful choices. Equip them well. Track movement. Celebrate progress. Then repeat.

When board members GIVE, OPEN DOORS, CULTIVATE, and ADVOCATE, fundraising stops being something the development team carries alone - and becomes something the organization advances together.

READY TO STRENGTHEN YOUR DONOR GROWTH STRATEGY?

Donor Success combines intelligent donor technology with practical advisory support to help nonprofits build stronger relationships, improve retention, and grow sustainable giving.

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Grow Donors. Grow Giving. Grow Impact.