

BOARD ENGAGEMENT GUIDE FOR FUNDRAISING & FUNDER RELATIONSHIPS



WHAT YOU'LL GET OUT OF THIS GUIDE:

This guide is designed to provide Executive Directors, Finance Directors, Senior Development Officers, and Institutional Giving Specialists in arts and culture organizations with practical strategies and tools to effectively engage board members in fundraising activities. It outlines methods for leveraging board members' networks, clarifying their roles in development efforts.

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MINDSET SHIFT: BOARD AS FUNDRAISING PARTNERS

REFRAMING BOARD ENGAGEMENT

Fundraising is not solely about asking for money—it is about creating opportunity, storytelling, and relationship-building. Board members bring credibility, social capital, and influence that can open doors not otherwise accessible.

ESPECIALLY IN ARTS & CULTURE

Board members are often patrons themselves. Their passion for the mission and their cultural credibility can be emphasized to strengthen relationships with funders.



ROLE DEFINITION: BOARD MEMBER RESPONSIBILITIES

CLARITY IS ESSENTIAL

Board members should understand how they can engage without needing to ask for money directly.

DEFINED ROLES:

Purpose	What It Looks Like
Connector	Introduces staff to funders, donors, or corporate partners
Storyteller	Shares personal experiences with the organization in meetings or donor communications
Host	Opens homes or businesses for cultivation events.
Champion	Publicly advocates for the organization's impact—especially online or in professional settings
Solicitor	Joins a staff member in a donor or funder ask meeting

PRACTICAL ENGAGEMENT TOOLS & STRATEGIES

CALENDAR-BASED ENGAGEMENT PLAN:

Aligns board activity with the development calendar.

- Q1: Board networking mixer with prospects
- Q2: Behind-the-scenes donor tour (board invites VIPs)
- Q3: Campaign kick-off—board social shares and thank-you calls
- Q4: End-of-year giving push—board “why I give” campaign

TOOLS TO EQUIP BOARD MEMBERS:

- Board Fundraising Toolkit (sample scripts, talking points, key messages)
- Prospect List Review Template (for suggesting introductions)
- “Open Doors” Worksheet (matching contacts with the prospect pipeline)
- One-Pager on Key Institutional Funders (for background before meetings)

BUILDING COMFORT & CONFIDENCE

TRAINING & COACHING:

Provides short workshops or one-on-one coaching on:

- How to make warm introductions
- How to talk about the mission with funders
- What to expect in a cultivation meeting

PEER EXAMPLES:

- Seasoned board members share examples of successful engagement.
- Anonymous impact stories illustrate how board action leads to funding.

POSITIONING THE BOARD AS ADVOCATES TO FUNDERS

MATCHING FUNDERS' INTERESTS WITH BOARD EXPERTISE

Funder meetings can highlight board members with relevant experience or community leadership. The presence of a board member in a meeting signals commitment, sustainability, and shared vision.

STRATEGIC MESSAGING PREPARATION:

Board representatives are equipped with:

- One or two key impact statistics
- A personal “why I serve” statement
- Examples of the organization’s fiscal responsibility and innovation

MEASURING & CELEBRATING BOARD ENGAGEMENT

TRACKING METRICS:

- Number of introductions made
- Number of meetings attended
- Amount influenced (not just closed)
- Attendance at donor events

CELEBRATING WINS:

- Recognizing board efforts in newsletters or at board meetings
- Thanking members with personal notes showing the impact of their involvement

BOARD MEMBER ROLE DISCOVERY QUIZ

This quiz is designed to help board members identify how they can best support the organization's mission without always asking for money directly

INSTRUCTIONS: For each question, the board member should circle the letter of the answer that best reflects personal strengths and preferences.

01. Comfort level when talking about a personal connection to the organization:

- A. Enjoys sharing stories that inspire others
- B. Prefers showing support in quieter ways
- C. Will share but feels more comfortable connecting people than storytelling
- D. Prefers hosting a gathering and letting others speak
- E. Appreciates being present during meaningful conversations, even the challenging ones

02. Individual strengths that support the organization's growth:

- A. Knows people and enjoys making introductions
- B. Possesses passion and effectively explains personal reasons for caring
- C. Naturally hosts and enjoys planning and welcoming guests
- D. Uses personal platforms (LinkedIn, workplace, etc.) to raise awareness
- E. Feels comfortable being in the room for "the ask" when needed

03. Preferred situations that create excitement:

- A. Emailing an old colleague to introduce them to staff
- B. Sharing a story at a board meeting that moves others emotionally
- C. Hosting a dinner to introduce new people to the mission
- D. Posting about a recent impact report on social media
- E. Attending a donor meeting with the Executive Director

04. Preferred methods of supporting fundraising efforts:

- A. Working behind the scenes by connecting the right people
- B. Demonstrating the human side of the mission
- C. Supporting through hospitality and event planning
- D. Advocating publicly as a visible supporter
- E. Joining the team in the room during a donor pitch

05. Typical response when someone asks how they can help:

- A. Introducing them to a staff member
- B. Explaining personal reasons for getting involved
- C. Inviting them to a gathering at home or at the office
- D. Encouraging them to explore the organization and follow its work
- E. Helping staff craft the best way to request support

TALLYING RESULTS: Count how many times each letter is selected.

- **Mostly A responses – Connector:** A natural relationship-builder who easily opens door and makes introductions.
- **Mostly B responses – Storyteller:** An inspiring communicator whose personal story can move others to action.
- **Mostly C responses – Host:** A community-builder who uses hospitality to bring people together around the mission.
- **Mostly D responses – Champion:** An advocate who leverages personal voice and platforms to share the organization's impact and vision.
- **Mostly E responses – Solicitor:** A bold, strategic supporter who is comfortable participating in donor or funder conversations.



Written by Bex Ferrell, PhD & Kaitlyn Hardiman