



Board Engagement Kit Checklist

1. Copy of Bylaws
2. Copy of Strategic Plan
3. Copy of Board Engagement Form - [Click here for sample from Funding for Good's FREE STUFF](#)
4. Talking Points (key programs)
 - a. Program staff should work with the Executive Director to create talking points for each of the organization's key programs. This document should offer only the most important information you want to make sure board members are sharing with the community.
 - b. Talking points can be provided in list or paragraph form but should include the following: program name, brief description of services offered through the program, number of people served for a specific time frame (daily, monthly, or annually), and the major accomplishments, and ways the community can help meet program needs.
 - c. Example: The Opening Doors after-program offers tutoring and enrichment programs Monday-Friday throughout the school year. This year, 105 students from our local elementary and middle schools are enrolled. We are proud report that nearly 90% of our program participants increased their reading scores on average by one letter grade last semester. We are always looking for volunteers to read with children. I'm happy to get you a volunteer application form if you would like to be a part of this amazing program!
5. Calendar of Events
 - a. Encourage board members to save key dates in their calendars, not just tuck it away in their administrative notebooks!
 - b. Make sure board members know how to access the most updated event information! While social media and website calendars are great, nothing beats putting a hardcopy of upcoming event's in your monthly meeting packet.
6. **Current Needs** - BE SPECIFIC (exactly What you need, by When, and WHY!)
 - a. Materials- for programs, upkeep, office, special projects
 - b. Professional Skills/Services- landscaping, review of legal documents, general contractor
 - c. In-Kind- supplies, space, marketing
 - d. General labor- office maintenance, administrative support, filing, event volunteer, etc.

7. Fundraising Goals/Events

Helpful Hint: Provide the board with a breakdown of fundraising efforts for each month of the year. The fundraising/development plan should outline how the board intends to meet the annual budget.

- a. Specific campaign information
 - i. Annual Fundraiser
 - ii. Special Events
 - iii. Crowd Funding/Social Media Platform Campaigns
 - iv. Capital Campaign
 - v. Direct Mail Request

8. Impact Statements to share with the community

- a. Power of your dollar: Did you know that a \$5.00 contribution allows us to purchase 27 jars of peanut butter for our food pantry? Amazing right?
- b. Power of Volunteerism- Did you know that reading with a child for 10 minutes a day..
- c. Power of Being an Ambassador- Share how sharing your programs/services/mission in the community makes a difference!

9. Stories to Tell

- a. Invite clients to share their stories with your board at meetings/events so the board can share those in the community.
- b. Provide written "success/impact stories" (might be from a newsletter, e-blast, staff member, thank you letter that was received, or a client narrative.

10. Accountability and Impact Chart

- a. Create a simple table/chart so board members can track the commitments they make, progress updates, and completion of tasks.
- b. Encourage board members to share their progress at meetings to motivate and hold everyone accountable for commitments made at the individual and/or collective level.

11. Prospect List

- a. Include some blank pages in your board engagement kit or a simple table to track community interactions/contacts.
- b. Encourage board members to note any "prospects" they would like to share with the organization. Prospects might include: potential volunteers, sponsors, community partners, donors, or other key connections.
- c. Be sure to board members note prospect names, professional associations, contact info, and possible ways to engage each "prospect!"

12. Outreach Materials

- a. Provide a manila envelope with a few updated event flyers, business cards, program brochures so that board members can share when opportunities arise.