

Board Campaign Mechanics
Updated: February 2026

From the board director's perspective:

1. Face-to-face meeting with a board leader communicates weight and importance. Meeting content is much more broadly about board service in the holistic sense, rather than just financial, and offers significant opportunity for the voicing of interests, passions, and concerns.
2. A review of last year's participation agreements is reviewed and a new Personal Action Plan (PAP) is agreed upon.
3. The revenue side of the budget is discussed in detail to aid understanding of the role directors can play in revenue generation. The portion that board giving represents is clearly understood, and a clear connection is made all the way back to the strategic goals.
4. Past giving is reviewed and appreciated.
5. Current year's specific ask is clearly and explicitly requested and is seen in the context of the overall board goal. Options for payment are discussed and understood.
6. Commitment is given and pledge form is presented and signed.
7. Receives "Thank you" message from board and staff leadership within days. Eventually shares in the good news that the board goal has been achieved (exceeded?).

Sequencing

1. Board Chair, Executive Director, and DC Chair need to agree on a board goal. The goal should be greater than last year's actual but with a significant feeling that exceeding it is very possible.
2. Board Chair, Executive Director, and DC Chair need to agree on ask amounts *for each director*. The sum of the ask amounts should exceed the goal by at least 10-20%.

3. Board Chair sets appointments with each of the directors. (This task could be shared with the Chair-elect, an Emeritus Chair, the DC Chair, or even the Executive Director, but if the ED is used, s/he should be accompanied by another board member.) In general, these appointments should be made in order of ask amount. When larger gifts are committed first, other gifts are seen in that context. Ideally these appointments are completed by the end of February (end of March at the latest).
4. The conversations are timed for about an hour. The outline for each appointment should be similar for each director but may vary widely from year to year. Significant attention should be paid to *listening*.
5. Toward the end of the conversation, the Board Chair “makes the case” for board giving, reminds the director of past giving, and asks for the agreed upon amount. There may be some negotiation – indeed there may even be a delay in getting a final answer - but when a final amount is settled upon, that’s when the pledge form is brought out and signed. Pledge forms should not be mailed or even presented before the director has agreed to a specific amount. If an answer is not possible in the moment, the Board Chair and the director agree on specific follow-up steps and a timeline for achieving them.
6. The results of each meeting should be communicated back to staff for processing immediately after each meeting. Processing includes possibly alerting other board leadership and the ED of specific gifts, organizing the acknowledgements, calendaring pledge reminders, and so on.

Benefits

- The process demonstrates and communicates good leadership.
- By March of each year, the board directors will have made their giving intentions known, eliminating some end-of-year anxiety, and providing a very positive answer for those foundations and individuals who ask whether the board gives.
- It’s very good practice to ask and to be asked, and provides great experience for all those involved. The same practices and procedures will be used when asking major gift prospects.

- It opens the door for directors who might not be comfortable writing a large-ish check in December to consider a larger amount by making several payments.

Pre-Interview Data

Name(s)	
Phone	
Email	
Date first joined the board	
Term Limit Date	
Current Committee Assignments	
Leadership History	
Last Year's Gift	
Current Board Goal	
Current Year's Ask Amount	

Sample Interview Questions

- How's it going for you? Any comments, questions, complaints for the management?
- Here is a copy of your PAP from last year and the current Board Job Description. How do you feel it went last year? What did you learn? What could we be doing differently to help you get the most out of your board experience (and the most done)?
- What did you enjoy most about last year? What is driving you the most crazy?
- Tell me about your committee experience. Any feedback on the committee process? Are you on the right committees for you? Would you like to be on (a) different committee(s)?
- You will be on the board for another _____ years before you rotate off. What would you like to have accomplished before you leave board service?
- For potential leaders – Have you considered taking a leadership position with the organization? We're thinking a good deal in advance – what would you need to do to get ready for such leadership? (*Think in terms of experiences leaders should have before being asked to lead, such as committee service on each committee, experience representing the organization in public, fundraising, and so on.*)
- Let's look at the 20__ budget. Any questions? On a scale of 1-10, how comfortable are you with what we've taken on? (*Think about asking a specific question about the budget - one that will demonstrate knowledge of the issues – such as a new investment, program, or staff position, or perhaps an investment into endowment.*)
- In the revenue side, do you understand your role in making this happen? (*Ask about building relationships with specific donors.*) What could we do to help make that role easier for you to accomplish?
- What would you like to see included in your Personal Action Plan for this year?
- This year, our board goal is _____ and I'm confident we can get there. Keeping in mind that quarterly or even monthly pledges are OK, I'd like to ask that you consider a gift toward this goal of _____. Could you do that?