



Donor Cultivation Through Nonprofit Governance

This worksheet is offered by CCS and our partners at the Nashville Symphony as a tangible tool to support your strategy. Track your progress and answer each question to leverage all five considerations.

1. DEFINE OUR "WHY". IS OUR GOAL TO... [SELECT UP TO THREE]

- Grow our pool of mid-level dollar donors?
- Cultivate Millennial and Gen Z philanthropy (and our broader community)?
- Develop new audiences / patrons / customers, especially in a target demographic?
- Vet prospective board members?
- Develop an ongoing pipeline, i.e., "feeder," to grow and enhance our Board of Directors?
- Improve engagement with a particular community related to our organization's model?
- Advance goals related to diversity, equity, inclusion, and belonging for our organization?

2. DETERMINE OUR CHAMPION FOR THIS INITIATIVE. [SELECT ONLY ONE]

- Our CEO or President?
- Our CEO or President's Office (i.e., an executive assistant, coordinator, or special projects team member)?
- Our Marketing team?
- Our Community Engagement/Education team?
- Our Development/Philanthropy team?
- A board committee?

3. VALUE THE PROGRAM FISCALLY INSIDE OF OUR ORGANIZATION.

- What is our fiscal commitment to funding this program? How much can we allocate?
- What expenses do we project?
- What is our revenue expectation from this board?
- What are our expectations for Associate Board member *giving*? Will we have a *give-get* policy? It can be a percentage of income, a "top three" request, a certain amount or threshold, or tangible ways to track *give-get*.

4. EMBRACE THIS AS A RESUME AND NETWORK-BUILDING OPPORTUNITY.

- What is our Associate Board term length and structure? Have we accounted for some members transitioning to new organizations and/or new careers during their term?
- Are we structuring board service so that members can grow their leadership skills and network proportionately to their contributions of time, talent, and treasure?
- Have we included meaningful opportunities for our Associate Board to engage with members of our fiduciary Board of Directors / Trustees and institutional leaders?
- Where have we incorporated learning, leadership development, and mentorship into our work? Are our expectations reasonable for board members' demographics?

5. MANAGE OUR 'CLIFF' – TRANSITIONS ARE KEY.

- What are our expectations for Associate Board members following their term?
- How are we designing our pipeline to ensure success and satisfaction for our volunteers (i.e., term length, any leadership/officer structures on our board)?
- Do we have a clear process to determine if and who from the Associate Board may be a good fit for our Board of Directors/Trustees, and who will not be a good fit?
- What communications and stewardship plans do we have in place to manage former Associate Board members? How will we continue to engage and leverage their enhanced affinity for our organization?