



# Talking Points for a Board Giving Conversation

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Your board members are some of your most important partners, both in their giving and their work for the organization. That's why it's so crucial to treat them like any other major donor by taking the time to sit down and discuss their annual gift.

Before you meet, be sure to prepare so that you know which important points to touch on and what exactly you are asking for. I even recommend writing down small details like their kids' names, some personal hobbies or interests, and a refresher of what you spoke about the last time you talked. It may seem like second nature, but it's so easy to get distracted and nervous when you get in the room.

Having this cheat sheet will make sure the conversation is seamless and successful! Plus, taking a few minutes to write this information down will help you remember it later, so you might not even need to look at your notes.

**As you prepare for your conversation, keep in mind this structure and set of talking points to help guide you.**

## Phase 1: Build rapport

It's likely that you know this person well or have at least worked together before, so take some time to reconnect and catch up.

## Phase 2: Thank them for their commitment

- Our board members are crucial to our organization and we are so proud to have you among this group of leaders.
- Share some specifics about their contribution to the board and the organization.
- We are so grateful for your/your family's gift of \$\_\_\_\_\_ last year which allowed us to \_\_\_\_\_.

## Phase 3: Make the ask

- As we look to the future, we are hoping to increase our revenue by \_\_\_% this year so that we can \_\_\_\_\_.
- Relate their passion to something in your plan for the year: Your/your family's passion for \_\_\_\_\_ resonates with me so much. I think you will be excited that we are planning to \_\_\_\_\_ this year.
- Would you consider a gift of \$\_\_\_\_\_ this year to help us make that happen?
- If you are asking early in the year, you may be able to discuss a monthly or quarterly payment option.

## Phase 4: Make a plan to follow up

It is very common for people to take some time to think about it, especially if you have just asked for an increased gift. Create a concrete plan to follow up on a specific date in the near future to secure their commitment or confirm a payment schedule

Feeling prepared is half the battle, my friend. If you take this conversation seriously, your board members will too – they will feel respected and appreciated, making them more likely to say yes to your ask. They will watch your success and look forward to following the same model when they go out and ask for their next gift, too.

**Your hard work is going to pay off. I know you can do this!**