
Board Leadership and the Campaign

Translating Insight into Action

A Discussion/Self-Reflection Guide to Speed Best Practice Adoption

Instructions:

Use the following discussion/self-reflection guide and related implementation tool at the conclusion of the webconference to help you prioritize the implementation of the best practices provided based on your institution's goals, available resources, and timeline.

1. Do you already use any of the tactics or practices presented today at your institution? If so, which ones? What are your lessons learned? How might you improve those tactics and practices?
2. What tactics presented today advanced your thinking about the way in which advancement staff can educate board and volunteer leadership about their role in a campaign? How so?
3. What was the single tactic that you could implement tomorrow at your institution to help your board understand their role in the campaign more effectively?
4. Which practice would you like to implement but do not currently have the resources to do so? What additional resources would you require to implement that tactic? How might you secure those resources?
5. What additional staff member on your team would benefit from hearing the information presented today? Be sure to forward your notes and this information to them for their review.

Source: Advancement Forum interviews and analysis.

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Implementation Guide to Speed Best Practice Adoption

Instructions:

Based on your institution's goals and available resources, map out which of the tactics profiled in today's webconference you want to prioritize in the chart below. Use this vision document to assign program responsibility and next steps.

Tactic	Immediate	Possible for Future	Not Applicable	Next Steps	Staff Assigned
Campaign Fluency Checklist					
Off-Cycle Education Sessions					
Integrated Campaign Boards					
Reframed Job Descriptions					
Recruitment Worksheet					
Buddy System					
One-Year Trial Term					
Self Audit					
Engagement Scorecard					
Board Referral Scorecard					
Philanthropic Visits					
Storytelling Frameworks					
Pre and Post-Visit Huddles					