

THE FOUR ROLES

Board Members Can Play in Fundraising

From Gail Perry's new book: **Easy Fundraising & Friendmaking for Board Members**

Make Friends First. Ask Later.

Every role matters. Every role raises money.

Not one of them requires you to lead with an ask.

Find the one – or the combination – that feels natural, comfortable, and energizing.

AMBASSADOR

Spread the Word and Invite People In

The Ambassador works with groups - spreading the word, building community awareness, inviting people in. Ambassadors are the friendmaking engine of the board. They host gatherings, share stories, and create the warm buzz that draws new people toward the cause.

"No script. No pressure. Just one friend inviting another to care about something worth caring about."

OCCASIONAL ASKER

When the Time Is Right and the Plan Is Solid

When the relationship is solid, the timing is right, and the plan is carefully prepared, some board members step into a direct gift conversation. This is never rushed, never improvised.

"Major asks are rarely a single moment. They are a process – unfolding over many conversations, guided by genuine relationship and mutual trust."

INFLUENCER

Open the Doors That Only You Can Open

The Influencer operates one-on-one – drawing on personal relationships and inside knowledge to open specific doors and guide key relationships. This is quiet, strategic work. Influencers introduce, advise, and navigate.

"The most powerful Influencer work is often invisible. It happens in quiet conversations, careful advice, and patient relationship-building that never shows up in any meeting minutes."

STEWARD

Thanking Makes Donors Feel Genuinely Valued

Stewards make donors feel valued after they give. A phone call. A handwritten note. An open door. Donors who received a personal thank-you call from a board member gave 39% more the next time.

"That is why a generic letter can feel hollow, while a two-minute phone call can move someone to tears. One acknowledges a transaction. The other acknowledges a human being."

Find your role. Then do what you do best.

Visit friendstofunds.com for the Ambassador's, Influencer's, Occasional Asker's, and Steward's Guides.
Bring this training to your board: inquire at info@gailperry.com

Friends First Model

Four Roles Every Board Member Can Play

