

## **SAMPLE AAA SURVEY: AN OPPORTUNITY CHECKLIST**

The following summary of the AAA program and the sample AAA survey is meant to be *adapted* for use in your organization. The survey should be tailored to reflect your nonprofit's development plan and goals and feel free to insert your logo or other branding. The survey should be revised each year to reflect new priorities and new interests on the board. It is a handy tool for discussing with board members how they want to be involved with your organization.

When you have created and distributed your survey to your board or volunteer group, collect the surveys, and then use the responses to structure the spreadsheet and work plan with your volunteers.

## **INTRODUCTORY MATERIAL**

### **WHAT IS A "TRIPLE A BOARD?"**

A board with a AAA Rating is one where every board member is motivated to be an *Ambassador, Advocate* and/or *Asker*—these boards thrive when there is a *culture of philanthropy* throughout the organization.

### **THE CULTURE OF PHILANTHROPY**

- Involves the full "development team"—board, other volunteers, staff, and highly engaged donors
- Commitment to mission, vision, and values
- An understanding that each interaction with anyone in the community is part of the development process
- Everyone thinks "development"
- Staff, board, and other volunteers understand the importance and purpose of the organization

- Visitors, employees, donors, and volunteers feel the culture when they interact with our organization

### **THE AMBASSADOR**

- Has made an appropriate financial commitment to the organization
- A role everyone needs to play
- Has key roles in cultivation of prospective donors and stewardship of continuing donor-investors
- Needs to be well oriented and coached in the message
- Master of the “elevator speech” (and the “elevator question”)
- Catalyst for donor-investor renewal

### **THE ADVOCATE**

- Has made an appropriate financial commitment to the organization
- Accepts assignments for strategic information sharing (formal and informal) about the organization
- May advocate on a formal basis with city officials, foundation officers, another organization with which the organization is partnering or informally with colleagues or potential board recruits.
- Is informed about the case for support and understands the strategic plan and vision
- Coached on desired results of personal advocacy and handling objections

### **THE ASKER**

- Has made an appropriate financial commitment to the organization
- Enjoys sharing his/her enthusiasm for the organization and asking for investment
- Well informed, well trained
- “Matched” with prospective donors (or current donor-investors) for maximum possibility of success
- Teamed with another board ‘Asker’ or staff leader

- Staff organizes the ask so the Asker’s focus can be on the single purpose of getting (or renewing) the gift
- Benefits from the work of the Ambassadors and Advocates

### **SAMPLE BOARD MEMBER SURVEY**

Adapted from Appendix C of *The AAA Way* book:

Please review the following roles and identify () how you will be involved in fundraising as an Ambassador, Advocate, and/or Asker. You may select all that apply to you. In making your selection(s), assume that you will be provided training, materials, and support to fulfill your role(s). Thank you for completing and returning this survey.

#### **I WILL BE AN AMBASSADOR**

**As an Ambassador, I will:**

- Host a minimum of (#\_\_\_) lunch/dinner meetings at home \_\_\_ or a restaurant
  - Bring interested friends and acquaintances for a tour of our facility (or other place people can visit). I will do this a minimum of (#) a year.
  - Bring interested friends and acquaintances to hear a program presentation from staff or an outside speaker.
  - Use my social networking resources to send out our organization’s web link with messages encouraging my friends to give and get involved.
  - Participate in up to (#) cultivation events this year.
  - Participate in “thankathons” (telephone calling to thank donors) after fund drives or special events
  - Become a member of the “gratitude” committee that will organize the thankathons and other stewardship programs.

Other Ambassador tasks I am willing to do (describe):

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**I WILL BE AN ADVOCATE**

**As an Advocate, I will:**

- Participate in program-based training about making the case for our organization so I can become a more informed Advocate.
- Become part of a speakers' bureau and/or offer to give talks to \_\_\_ my service clubs (Rotary, e.g.) or \_\_\_ church or at a \_\_\_ community center or at places chosen by the organization.
- Use my social networking resources to send out information on the organization or an issue we are dealing with to my network of friends for the purpose of raising their awareness of our programs.
- Use my writing, editing, and/or marketing skills to help us create/revise/rework our development and marketing materials and make sure that our messages are consistent across all materials we put out into the community.
- Be part of the Governance (nominating) Committee to create strategic recruitment plan and messages and/or to assist with the recruitment and enlistment of new board members.
- Other Advocate tasks I am willing to do:  

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**I WILL BE AN ASKER**

**As an Asker, I will:**

- Initiate conversations with people for the purpose of assessing their interest in making a gift, and then report on those conversations to staff and board leadership with the idea of participating with others in making the ask.

- Write personal letters/emails and/or make personal phone calls to invite people to become donor-investors in our organization.
- Use my social networking resources to make direct asks to my social network, encouraging them to give to our organization.
- Team up with staff or other volunteers to make personal calls on potential and current donors.
- Chair or participate on special events committees as a solicitor of sponsorships using my contacts or contacts provided to me.
- Other Asker tasks I am willing to do:

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Please provide your comments or other ideas for getting involved (use reverse side if needed):

**Note: When using or adapting this material be sure to credit the source:**

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