

THE BOARDSOURCE FUNDRAISING CHECKLIST

FUNDRAISING RESPONSIBILITIES AND OPPORTUNITIES FOR NONPROFIT BOARD MEMBERS

This inventory offers several benefits. First, it expands the notion of fundraising to include many activities other than asking for donations. It also solicits concrete information from individual board members about which tasks they are willing to complete. Finally, it provides a snapshot of the board's self-confidence and capacity, allowing the staff to provide customized support materials.

Be honest. Be realistic. Be willing to try something new.

How many are YOU willing to consider and undertake?

Mark each: Y = YES N = NO M = MAYBE (No more than 10 Maybes)

Level One: Building The Foundation

- ___ 1. **Commit** to the organization's vision and mission. Be willing to learn more about how to give and get contributed resources.
- ___ 2. **Provide** informed input into a market-oriented planning process (help decide which goals deserve priority given organizational capabilities, resources, depth of volunteer commitment, and implementation strategies).
- ___ 3. **Aid** in the creation of the fund development plan. Understand the plan's implications. Be willing to help execute it. (If you cannot, state why this is and be willing to work toward consensus on some revisions.)
- ___ 4. **Assist** in drafting the fundraising case statement — a comprehensive justification for charitable support — and be able to explain this rationale persuasively.
- ___ 5. **Decide** realistic budget allocations for the organization's fundraising program. (Be patient about how fast new income will be received, but ask questions, offer suggestions, and operate by agreed-upon procedures and assignments.)
- ___ 6. **Review, critique, and monitor** the action strategy — a policy and procedure outline of how and when the program is to be implemented. (This could be about types of fundraising on which to concentrate, methods of approach, ways to identify target markets, or how gifts are to be sought, allocated, reported, acknowledged, and then leveraged for more along with specific benchmarks to measure outcomes.)

- 7. **Understand** the organization's financial situation and probable future funding position. (Resist quick fixes and short-range decisions. Probe until you become convinced money is wisely used and staff is accountable.)
- 8. **Evaluate** progress by asking friendly — but searching — questions. (Are we doing what we agreed to do?) If no, why not? Are we getting improved results as time goes on? What specifically? If no, why? What reasonable changes might be explored? What do we require that is not available currently? Expertise? Staff time? Volunteers? Commitment level?)
- 9. **Join and get active** on at least one board committee and be alert for how its work can strengthen current fundraising endeavors. (Almost every aspect of the operation has some impact on development, directly or indirectly.)
- 10. **Approve** the creation or revision of a board member statement of responsibilities that includes clearly defined expectations for their personal giving and involvement in fundraising.

Level Two: "Friend Raising"

- 11. **Provide** the names and addresses of donor prospects for the development mailing list. (Share pertinent information about your contacts: individual preferences, interest level, any misgivings about the cause, and their inclination to donate money.)
- 12. **Research** phone numbers or secure exact addresses for campaign mailings.
- 13. **Attend** training workshop(s) to discover how better to carry out your role and to augment the overall development process.
- 14. **Prepare** useful and informative training materials for board members and other volunteers about how to raise funds.
- 15. **Recruit** volunteers and prospective helpers and suggest ways to interest and to involve persons with whom you or your friends are acquainted.
- 16. **Advocate** for the organization or cause and serve as an enthusiastic community relations representative. (Understand the organization's mission and programs and be prepared to answer common questions. Prompt others in the community to begin participating in the work of the organization.)
- 17. **Acquire** mailing lists from a variety of sources in the community to augment the organization's database.
- 18. **Facilitate** introductions and access to individuals or groups where you have credibility and influence. Nurture prospects and donors on a regular basis.

- 19. **Distribute** (hand deliver) invitations or promotional material to targeted markets: individuals, businesses, churches, temples, community groups, or clubs.
- 20. **Cultivate** more varied media contacts for wider publicity and promotion. Link your organization with regional councils, societies, or associations. Seek out wider sponsorship for events, programs, or educational sessions.
- 21. **Join** the speakers bureau or agree to be a spokesperson for your organization at some specific occasion or event.
- 22. **Spearhead** the formation of a business and professional advisory group and encourage one of your own professional advisors (such as a CPA or an attorney) to become involved.
- 23. **Find and relate** one or more human-interest stories to illustrate why gifts are needed and how they are used to provide, enhance, or expand your organization's outreach and impact.
- 24. **Brainstorm** innovative ways to thank and to recognize donors. For instance, arrange a special "thank-a-thon" in which board members phone donors to express gratitude for their contributions, with no solicitation included in the conversation.
- 25. **Research** individual prospects, foundations, and corporate funding sources through public information sources. Locate promotional partners or establish a joint venture. Summarize your findings for staff or committee use.
- 26. **Write** a personal testimonial or letter of support for public use or agree to be quoted as to why you support the organization.
- 27. **Hand-deliver** thank-yous, acknowledgments, or special awards to volunteers, contributors, or support groups.
- 28. **Participate** in an evaluation session, during which you help campaign leaders gather the information they need about giving patterns and capacity of identified prospects.
- 29. **Assist** in fundraising special events, such as auctions, fairs, bazaars, open houses, tours, or tournaments. Enlist others to help in ways that they perceive are useful and fun, so they will want to do it again. Welcome newcomers; circulate and mingle to spread a friendly spirit, learn names, and discover common interests.
- 30. **Sell** products, tickets, or premiums where proceeds directly benefit your organization.
- 31. **Visit** a community leader to explain needs to be met and accomplishments of the organization. Initiate follow-up visits to sustain and increase interest.

- 32. **Host** — in your home or at a restaurant — a small group of volunteers or donor prospects to better acquaint them with the value of your organization's priorities: educational programs, advancement of a cause, or effective human-services delivery.
- 33. **Establish** a planned giving program by finding ways to underline the importance of a remember-us-in-your-will emphasis.

Level Three: Solicitation

- 34. **Contact** local businesses and vendor suppliers to seek an in-kind donation, such as supplies, equipment, technical assistance, or personnel (interns, released time, loaned executives, etc.).
- 35. **Personalize** the annual direct mail program or other endorsed campaign by using at least two of the following techniques:
 - Hand address envelopes for use with top donors.
 - Add a personal P.S. or thank-you on the prepared acknowledgment.
 - Compose and send your note of appreciation for a gift.
 - Phone to thank some of those who responded.
- 36. **Increase** your donation each year to help reach the goal and assist in setting the pace for others, so that you will become a credible solicitor.
- 37. **Request** a pledge or a contribution from designated prospects or lapsed donors.
- 38. **Solicit** a cash contribution from a service club, civic group, or church or temple, or request a gift for a particular promotion or publication.
- 39. **Accept** a leadership role to organize solicitation teams or a specific campaign.
- 40. **Ask** selected individuals for a specific gift or a multiyear pledge. Visit them personally, accompanied by a staff member or another volunteer.