

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 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 you 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 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-you's, acknowledgements, 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 the 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 acknowledgements
 - 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.

From BoardSource's *Fearless Fundraising for Nonprofit Boards* (2003)

For more information on ensuring adequate financial resources, see *Fundraising Responsibilities of Nonprofit Boards*, in the BoardSource Governance Series, and *Fearless Fundraising*, another BoardSource publication