



Board Fundraising: Culture Assessment

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.

Donor Bill of Rights

- I. To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.
- II. To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.
- III. To have access to the organization's most recent financial statements.
- IV. To be assured their gifts will be used for the purposes for which they were given.
- V. To receive appropriate acknowledgement and recognition.
- VI. To be assured that information about their donation is handled with respect and with confidentiality to the extent provided by law.
- VII. To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.
- VIII. To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.
- IX. To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.
- X. To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.



Fundraising Communications Toolkit for Board Members

TALKING POINTS ABOUT THE ORGANIZATION

(e.g., The Case for Support Written for Conversation)

Possible sections within this area include are listed below:

1. The “elevator” speech: How to describe your organization in 2 minutes.
2. Why should someone give to your organization? What is the need that you are addressing?
3. What does your organization do? Provide overview of programs and services.
4. Who does your organization work with? Who are its customers and clients?

KEY SELLING POINTS OF THE ORGANIZATION

This section could consist of particular authority your organization has (“We provide the seal of approval for ‘X.’”); impressive information about who or how many clients you serve (“We serve over 1,000,000 people annually.”); any impressive awards your organization has received (“We received the ‘X’ award from the state.”); impressive statistics about how your organization is run (“We only have five paid staff but over 500 volunteers who make all of our services possible.”); or the uniqueness/indispensability of the service you provide (“We are the only shelter for battered women in the five-county region,” or “We are the only museum solely devoted to children’s literature in the country.”).

OUTCOMES, EVALUATION, AND EFFECTIVENESS

1. Outcomes achieved by your organization, preferably in quantifiably measurable terms and as they relate to goals
2. Information about the evaluation efforts undertaken by your organization, and the results
3. Data about demand for your services
4. Data about efficiencies in your organization’s operations

STORIES AND TESTIMONIALS

Recounting a personal story from a client is often the best and easiest way for a board member to talk about what your organization does. Also, board members often find testimonials personally motivating, which builds their confidence when fundraising. This section should include three or so of the best or most inspiring stories that are easy for a board member to relate. Be sure that no stories encroach upon a confidentiality agreement that the client may have with your organization.

HOW YOUR ORGANIZATION IS FINANCED

Potential donors want to know how your organization is financed. This section should include information about the sources of income for your organization, such as earned income sources, government grants, foundation or corporate grants, and individual donations. It is also helpful to include some numerical data, such as:

- earned income versus donations as a percentage of budget
- administrative/overhead costs as a percentage of budget
- fundraising costs as a percentage of budget
- unrelated business income as a percentage of budget

Please note that this data does not necessarily indicate success or failure at fundraising and should not be framed in that context.

OTHER POSSIBLE SECTIONS TO INCLUDE IN THE TOOLKIT

Your organization may find it useful to include other sections in order to guide your committee members in solicitation and communication. The following list provides further possibilities, always leaving an open door for whatever works best for you:

- Fact sheets on primary programs and services
- Sponsorship opportunities
- Synopsis of a current strategic plan
- List of all funders