

BoardSource Fundraising Checklist

How many are you willing to do or consider?

Mark each **Y**= Yes; **N**= No; **M**= Maybe (if I had additional training/support)

Level 1: Building the Foundation	
	Aid in the creation of a fund development plan. Understand the Plan's implications.
	Assist in drafting a fundraising case statement- a comprehensive justification for charitable support- and be able to explain this rationale persuasively.
	Understand the organization's financial situation and future funding position.
	Evaluate progress implementing the plan - Are we doing what we said we'd do? If not, why not? Are we getting good results? What additional resources might be needed?
	Join and be active on at least one board committee and be alert for how its work can strengthen fundraising efforts.
	Approve the creation or update of a board member statement of responsibilities that clearly defines expectations for personal giving and involvement in fundraising.
Level 2: Friend Raising	
	Provide the names and addresses of prospective donors for the development mailing list.
	Research phone numbers and/or exact addresses for mailings.
	Recruit prospective volunteers from friends and acquaintances
	Advocate for the organization and serve as a community relations representative. Understand the organization's mission, be prepared to answer questions and prompt people to get more involved.
	Distribute invitations or promotional materials to targeted markets: individuals, business, other organizations and community groups.
	Cultivate varied media contacts for wider publicity and promotion.
	Seek out wider sponsorships for events or programs.
	Join a speakers' bureau or agree to be the spokesperson for a specific organization or event.
	Write a personal testimonial or letter of support for public use or agree to be quoted as to why you support the organization.
	Write thank you letters and acknowledgements to donors, volunteers and support groups.
	Assist in planning and volunteer at fundraising events.
	Sell products, tickets, etc. that directly benefit your organization.
	Visit a community leader to explain the accomplishments and needs of your organization.
	Help establish a planned giving program.
Level 3: Solicitation	
	Contact local businesses and vendors to seek out in-kind donations
	Personalize fundraising campaigns by adding a personal thank you to prepared acknowledgements, writing a personal letter or calling donors to thank them.
	Increase your personal gift each year (set a good example for other donors)
	Request a pledge or contribution from lapsed donors.
	Solicit a cash contribution from a service club, civic group or business.
	Ask selected individuals for a specific gift or multi-year pledge. Visit them personally with a staff member or other board member.