

FUND RAISING RESPONSIBILITIES AND OPPORTUNITIES FOR NONPROFIT BOARD MEMBERS

How many are YOU willing to consider and undertake?

Mark each: Y = YES M = MAYBE** N = NO ? = DON'T UNDERSTAND

**No more than 10 "maybes" are allowed among the 42 questions.

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

LEVEL ONE

- _____ 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 relevant strategies for implementation.
- _____ 3. **Aid in the development of and vote support** for the fund development plan. Understand the plan's implications and 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 fund raising 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 a strategy: a policy and procedure outline of how and when the program is to be implemented (for example, type of fundraising on which to concentrate, methods of approach, ways to identify target markets, how gifts are to be sought, allocated, reported, acknowledged, and then leveraged for more). Help establish specific benchmarks for desired outcomes.
- _____ 7. **Understand** the organization's financial situation and probable future funding position. Oppose quick fixes and short-range decisions. **Probe** until you become convinced money is wisely used and staff is accountable. **Insist** that the board get serious about the necessity of "fiscal fitness."
- _____ 8. **Evaluate progress** by asking friendly –but searching – questions: Are we doing what we agreed to do? If not, why not? Are we getting improved results as time goes on? What specifically? If not, why? What reasonable changes might be explored? What do we require that is not now available? Expertise? Staff time? Volunteers? Commitment level? (Think of fundraising as a marathon, not a spring—sustained momentum is the key to success.)

- ___ 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. **Support** the executive director's leadership and her management of staff. (If that ever becomes difficult, talk with the board chair or the executive about your concerns and offer to aid in finding solutions.)
- ___ 11. **Approve** the creation or revision of a board member statement of responsibilities that includes clearly defined expectations for trustee personal giving and involvement in fundraising.
- ___ 12. **Help the board establish** goals for board giving.

LEVEL TWO

- ___ 13. **Provide** the names and addresses of donor prospects for the development mailing list. Share pertinent (not private) information about your contacts: individual preferences, interest level, any misgivings about the cause, and their inclination to donate money.
- ___ 14. **Volunteer** to supplement the work of clerical or other development staff as requested. For instance, proofread material, sort and file, take minutes, fill in for the receptionist, prepare mailing packages, help set up a room, or locate what is needed for a productive meeting.
- ___ 15. **Confirm** with each person who is to attend the day, date, time, place, and assignment(s) for important meetings. Follow up by sending a summary of the meeting to those who missed it.
- ___ 16. **Attend** training workshops (s) to discover how to better carry out your role and augment the overall development process.
- ___ 17. **Recruit** volunteers and prospective helpers and **suggest** ways to interest and involve persons with whom you or your friends are acquainted.
- ___ 18. **Advocate** for the organization or cause and serve as an enthusiastic community relations representative. Understand the organization's mission and programs and be able to answer common questions. **Prompt** others in the community to begin participating in the work of the organization.
- ___ 19. **Originate** introductions and access to individuals or groups where you have credibility and influence. **Cultivate** prospects and donors on a regular basis.
- ___ 20. **Distribute** (hand deliver) invitations or promotional material to targeted markets: individuals, businesses, churches, temples, community groups, or clubs.
- ___ 21. **Facilitate** 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.

LEVEL THREE

- ___ 33. **Contact** local businesses and vendor suppliers to seek an inkind donation, such as supplies, equipment, technical assistance, or personnel (interns, released time, loaned executives, etc.).
- ___ 34. **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 acknowledgement.
 - Compose and send your note of appreciation for a gift.
 - Send your own appeal (samples can be provided) to selected persons.
 - Phone to thank some of those who responded
- ___ 35. **Include** the organization in your annual charitable giving.
- ___ 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 in a group phonathon – or on your own within a prescribed time frame.
- ___ 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. Before your term is completed, **enlist** your replacement.
- ___ 40. **Consider** making your organization part of your charitable estate planning through a bequest or life income plan.
- ___ 41. **Allow** your organization to release your financial commitment to the public to raise awareness of the cause and stimulate others to give.
- ___ 42. **Ask** selected individuals for a specific gift or a multi-year pledge, going to see them personally, accompanied by a staff member or another volunteer.

**SCORING KEY AND SCALE
FUND RAISING RESPONSIBILITIES AND
OPPORTUNITIES AFOR NONPROFIT BOARD MEMBERS**

SCORING METHOD

Level One	2 points for each YES answer to questions 1-12	24 points possible
Level Two	3 points for every YES answer to questions 13-32	60 points possible
Level Three	5 points for every YES to questions 33-42	50 points possible

Total possible points = 134

WHAT TOTALS MIGHT MEAN

134-110	You are a champion. Keep it up.
109-80	Your commitment is extremely valuable; can you increase it?
79-50	Reconsider how many “maybe’s” could become “yes’s.”
49-30	Reevaluate why you were asked to serve as a board member and what prompted you to accept the position. Rethink your “no’s.”
29- or less	Talk to the executive director or board chair about the organization’s expectations for board service.

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