

Board Fundraising Culture Assessment

1. Are prospective board members made aware of their fundraising responsibilities before they are elected to the board?
 Yes No sort of/maybe/not certain
2. Are fundraising responsibilities and personal giving included in the board member expectation agreement?
 Yes No sort of/maybe/not certain
3. Do all or almost all board members make a yearly personal “stretch” gift to the organization’s annual fund?
 Yes No sort of/maybe/not certain
4. Does the board chair personally solicit board members annually to ensure appropriate board giving? Does the board chair take time to personally cultivate and steward appropriate higher level prospects and donors?
 Yes No sort of/maybe/not certain
5. Does the executive director take time to personally cultivate and steward appropriate higher level prospects and donors?
 Yes No sort of/maybe/not certain
6. Does the board’s fundraising committee organize the board’s fundraising rather than actually doing the fundraising itself?
 Yes No sort of/maybe/not certain
7. Is the organization’s mission statement clear, concise, and compelling? Can all or almost all board members recite it?
 Yes No sort of/maybe/not certain
8. Beyond just reciting the organization’s mission statement, can at least 80% of board members convincingly articulate the case for support of the organization?
 Yes No sort of/maybe/not certain
9. Does the director of development (or other staff person) identify appropriate cultivation and stewardship opportunities for board member participation?
 Yes No sort of/maybe/not certain

10. Have the chief executive and director of development presented a clear fundraising strategy to the board and solicited board input?
- Yes No sort of/maybe/not certain
11. Do the chief executive and board chair organize meeting agendas to give clear priority to fundraising?
- Yes No sort of/maybe/not certain
12. Do the chief executive and board chair plan annually for board training opportunities in fundraising?
- Yes No sort of/maybe/not certain
13. Do the chief executive, board chair and director of development publically acknowledge and recognize board members who are fulfilling their fundraising responsibilities?
- Yes No sort of/maybe/not certain

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

How many are YOU willing to consider and undertake?

Mark each: Y – yes N = No M – maybe (no more than 10 maybes)

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

Leven One: Planning and Building

- _____ 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 the fundraising 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 implication. 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 fundraising program.
- _____ 6. Review, critique and monitor the fundraising strategies
- _____ 7. Understand the organization's financial situation and probable future funding position.
- _____ 8. Evaluate progress by asking friendly but searching questions.
- _____ 9. Join and get active on at least one board committee and be alert for how this work can strengthen fundraising endeavors.
- _____ 10. Approve the creation or revision of a board member statement of responsibilities that includes clearly defined expectations for personal giving and involvement in fundraising.

Level Two: Friend Raising

- _____ 1. Provide the names and addresses of donor prospects for the mailing list. Share pertinent information about your contacts

- _____ 2. Research phone numbers or secure addresses for campaign mailings
- _____ 3. Attend training workshops to discover how better to carry out your role and to augment the development process
- _____ 4. Recruit volunteers and prospective helps and suggest ways to interest and involve people you know.
- _____ 5. Advocate for the organization and serve as an enthusiastic community relations representatives.
- _____ 6. Acquire mailing lists from a variety of sources in the community to augment the organization's database.
- _____ 7. Facilitate introductions and access to people where you have credibility and influence.
- _____ 8. Distribute (hand deliver) invitations or promotional materials
- _____ 9. Cultivate media contacts for wider publicity and promotion
- _____ 10. Join the speaker's bureau or agree to be a spokesperson for the organization at some specific event.
- _____ 11. Spearhead the formation of a business or professional advisory group.
- _____ 12. Brainstorm innovative ways to thank and to recognize donors.
- _____ 13. Research individual prospects, foundations or corporate funding sources.
- _____ 14. Write personal testimonial or letter of support for public use
- _____ 15. Hand deliver thank-yous, acknowledgements or special awards
- _____ 16. Assist in fundraising special events.
- _____ 17. Sell products or tickets to events
- _____ 18. Visit community leader to explain needs to be met and accomplishments of the organization.
- _____ 19. Host – in your home or at some other location – a small group of donor prospects.

Level Three: Solicitation

- _____ 1. Contact local businesses to seek an in-kind donation
- _____ 2. Personalize the annual direct-mail program or other campaign by using one or more of the following techniques:
 - Hand address envelopes for top donors
 - Add a personal PS or thank you on prepared letters
 - Compose and send your note of appreciation for a gift
 - Phone to thank some of those who responded.
- _____ 3. Increase your donation each year to help reach the fundraising goal
- _____ 4. Request a pledge of contribution for designated prospects or lapsed donors
- _____ 5. Solicit a cash contribution form a service club, civic group or church/temple
- _____ 6. Accept a leadership role to recognize solicitation teams
- _____ 7. Ask selected individuals for a specific gift or multiyear pledge.

Fifty-Three Ways for Board Members to Raise \$1,000

By Kim Klein

1. **Give it yourself.** This is the easiest way for those who are able, although if you are able to give this much money you should be helping to raise much more than \$1,000.
2. **List all of your friends who are interested in your organization or similar organization.** Decide how much you want to ask each one for. If you are not sure of an amount, use a range. Write to them on your own stationery, include a brochure from the organization and a return envelope. Phone those people who don't respond in two weeks. Some people will need 10 friends to give \$100, and some people need 50 friends to give \$20. Most people will need a combination of gifts of \$100, \$50 and \$25.
3. **Give part of the \$1,000.** Then ask your friends to join you in giving \$50, \$100 or whatever amount you gave. This is most effective because you are not asking them to do anything you haven't done.
4. **Set up a challenge campaign.** Challenge gifts can be quite small. Tell people you'll give \$5 for every \$25 they give or will match every \$50 gift up to ten gifts. For added suspense, make this challenge during a fundraising event. You or the host can announce, "We now have the Dave Buck-stretch Challenge. For the next five minutes Dave will give \$5 for every new member that joins Worthy Cause."
5. **If your organization has several grassroots fundraising strategies in place, use them all:**
 - a. Sell 100 raffle tickets @ \$2 each
 - b. Give \$200
 - c. Sell 10 tickets to annual event at \$25
 - d. Buy two gift memberships @\$25
 - e. Get 12 friends to join @ \$25
6. **Help with our organization's phone-a-thon.** Bring the names of people you think would like to join and call until you have raised \$1000. Or trade names with someone in the organization and call their friends until you have reached \$1000.
7. **Acquire mailing lists for your organization.** If you belong to another group, perhaps you can set up an exchange or perhaps you have access to a list of members of some other group. You can ask all your friends to give you the names of 10 to 15 people they think would like to join. You would need to recruit about 25 people at an average gift of \$40.

8. **Give the organization something they need that is worth \$1000** such as a new computer, filing cabinets, couch, software program, etc.
9. **Pledge \$28 a month** and get two others to do likewise
10. **Teach a seminar on a topic you know:** fundraising, knitting, organic gardening, gourmet cooking, dog grooming. Charge \$50-\$75 per person, with the goal of 15 to 20 people. Absorb the cost and give all proceeds to the organization.
11. **Give some or a lot of things to your organization's garage sale**, making sure they are worth \$1000 and then help to sell them all.
12. **With four or five friends, have a spaghetti dinner** at a temple, church or union hall or other big room with a large kitchen. Charge \$10 per person and feed more than 100 people. You can charge extra for wine or dessert.
13. **Have a fancy dinner at your home or a regular dinner at someone's fancy home.** Serve unusual or gourmet food, or have special entertainment. Charge \$40 or more per person and have 25 or more guests.
14. **Get three friends to help you have a progressive dinner.** Start at one person's home for cocktails and hors d'oeuvres, progress to the next person's house for soup or salad, and the next person's for the main course, and the last person for dessert. Either charge by the course or for the whole package.
15. **Host a house party.** Do not charge admission and invite as many people as you can. During the party, give a short talk about your organization and ask everyone to consider a gift of \$25, \$50, \$100 or more (depending on the crowd). Either pass out envelopes or have a designated spot for donations.
16. **Get your gambling friends together.** Charge a \$5 entrance fee and have a poker evening, asking that every "pot" be split with the organization. Individuals win and so does the organization. You can charge extra for refreshments or include one or two glasses of something with the price of admission.
17. **Do one fundraising event every other month.** This might look like:
 - a. Poker Party \$200
 - b. Fancy dinner (8 people x \$50) \$400
 - c. Sell 50 raffle tickets @ \$2 \$100
 - d. Book sale \$200

e. Recycle newspapers

\$100

18. **Solicit small businesses, churches, synagogues or service clubs for \$1000.** If you are active in a church or you own your own business and are involved in business organizations or service clubs, this can be very effective. You can often raise \$200 - \$1000 with a simple proposal and oral presentation.
19. **Take a part-time job** in addition to your present work and give everything you earn up to \$1000.
20. **Ask five to ten people to save all their change for three to five months.** You save yours. Count it at the end of the prescribed time and use one of the other methods to raise the rest if need be.
21. **Ask two to five friends to help you put on a bake sale, book sale, or garage sale.** You and your friends bake the goodies or get the books or the other stuff required for the sale, staff it and clean up afterwards. This is an excellent way to get people involved in fundraising without ever actually asking them for money. Plus you are able to spread the word to everyone making a purchase.
22. **For the fairly rich: Give your organization \$13,000 as an interest free loan for a year.** They invest it, earn 8% and at the end of the year, they give your \$10,000 back.
23. **Sell your organization's materials, buttons, T-shirts, bumper stickers, or whatever else they have for sale.** Also, help distribute these to bookstores or novelty shops.
24. **The Farming Out Method: Entice five friends to sell 100 raffle tickets at \$2 each, or invite ten friends to raise \$100 however they like.** Share this list of suggestions with them. Give them a nice dinner at the successful end of their efforts (or a bottle of good wine, or a weekend away).
25. **Get a famous or popular person to do a special event.** Watch the costs on this, or you may lose money.
26. **Invite people to your birthday party and ask that in lieu of gifts they give money to your organization.**
27. **Conduct a volunteer canvas.** For one evening, you and a group of friends take literature to all the neighborhoods around you and ask for money at the door. Be sure to comply with city and county ordinances.

28. **Lead or get someone to lead a nature walk, an architectural tour, a historic tour, a sailing trip, a rafting trip or a horseback ride.** Charge \$15-\$25 per person, or charge \$35 and provide lunch. Advertise the event in the newspaper to draw in people from outside your organization.
29. **Start a pyramid dinner, or a chain dinner.** Invite 12 people and charge \$12 each. Get two people of the twelve you invited to invite 12 people each at \$12 and two people from each of those dinners to have 12 people at \$12 and so on. Here's the income:
- | | | |
|-----------------------|-----------------------------------|-------|
| a. Your dinner | $\$12 \times 12$ | \$144 |
| b. From you dinner | $\$12 \times (12 + 12)$ | \$288 |
| c. From those dinners | $\$12 \times (12 + 12 + 12 + 12)$ | \$576 |
| d. From those dinners | $\$12 \times (12 \times *)$ | etc. |
30. **Collect cans for recycling.** Ask all your friends to save their cans and bottles for you and turn them in to a buy-back recycling center.
31. **Sell your frequent flyer miles to friends or donate them to the organization for an auction or raffle.** Watch the rules of the airline on this, but some airlines let you give away miles and you may be able to sell your miles as long as you don't go through a mileage broker.
32. **If you live in a nice house or own a getaway cottage in a beautiful place or an expensive city, rent it out for a week or a weekend two or three times during the year and give the proceeds to your organization.** Or rent a room in your home for much less than the cost of a hotel room to people needing a place to stay while they are on business in your city.
33. **Organize a service raffle.** Get four people (one can be you) to donate a simple but valuable service that many people could use and sell raffle tickets for \$10 - \$20 each. Keep the price a little high so you don't have to sell so many and so that the buyers have a higher chance of winning. Services can include childcare for a weekend or for any weekend night, one day of house cleaning, yard work, house painting, etc.
34. **Offer to do something your friends and family have been nagging you to do anyway and attach a price to it.** For example, quit smoking on the condition that your friends donate to your group, or get your friends to pay a certain amount for every day you don't smoke for up to 30 days. Agree to match their gifts at the end of the thirty days if you didn't smoke and to give them their money back if you did. This method could be applied to other healthy behaviors, such as exercising or not eating sugar.

35. **Find out what items your group needs and try to get them donated.** This is good for people who really hate to ask for money but who don't mind asking for things that cost money. Items that one can sometimes get donated include computers, office paper and other office supplies, office furniture (second-hand from banks and corporates as they redecorate), fax machines, food, even cars.
36. **If you or someone you know owns a small business that has regular customers who receive a catalog or announcements of sales, write them an appeal letter for the organization.** Your letter can say something like "You are one of my best customers. As such, I let you know about sales coming up and good things happening in my store. Today I want to tell you about another good thing – what I do when I am not minding the store."
37. **Similar to #36, post this letter on your website.** Link to the organization's website and ask people to donate.
38. **If the organization doesn't have a website or doesn't keep their website up, ask all your techie friends to donate \$100 each and hire a webmaster.**
39. **Give it yourself** (This is so good I have to say it twice.)
40. **Strategy with a long deferred payoff (we hope); leave the group a bequest.**
41. **With similar hopes as above, get friends to include the group in their wills.**
42. **Ask friends who belong to service clubs, sororities, antique collecting groups, support groups, bridge clubs, etc. to discuss your organization in their group and pass the hat for donations.** A once-a-year sweep of even small groups can yield \$100 from each.
43. **For the church-going, ask if your organization can be a "second collection."** The church passes the plate for its own collection and then you or someone from your organization gives a brief talk (or sometimes the whole sermon) about your group and the plate is passed again, the proceeds go to your group.
44. **A variation on the above is to organize a "second collection Sunday" and get as many churches as you can to take up a second collection for your organization on the same Sunday.** Someone from your group will need to be at each service and give a brief talk.
45. **If, as a child, you collected something avidly that you now store in a basement, consider selling it.** Coins and stamps are particularly valuable and have usually increased in value over the years. But your collection of rocks, toy ships, rockets

arrowheads, or Beanie Babies can also be valuable. When you donate the income from the sale, you can deduct that amount from your taxes – an added bonus.

46. **Have a sidewalk sale or garage sale for your whole neighborhood or building.** Go around to your neighbors and tell them you will take their stuff outside and sit with it all day to sell it if they will donate half or all of the proceeds to your group. Since this is stuff people want to be rid of anyway, it's a good deal for them.
47. **If you have an artistic bent, offer to design greeting cards to specification for an organization or individuals for a fee.** If you are good at calligraphy, sell your skills to schools for graduation announcements, friends for classy but low cost wedding invitations or just fun certificates. Create unique Halloween costumes or masks. Donate the proceeds from your artistry.
48. **Create a take-off on the "adopt a highway" technique by naming budget items of your group as available for adoption.** You could develop a flyer that reads "The following items have been found near death from negligence and abuse. Won't you help? \$25 a month will ensure that our computer is maintained. \$100 a month will release your photocopier from toiling with not toner and a dying motor (we can lease a new one.)"
49. **An idea for people who live in border towns: Get permission to place a large container in stores or even at the airports of towns near national borders.** Have a sign that asks people (in several languages) to throw in any coins or paper money they have not exchanged. Many times people leaving Canada or Mexico don't have time to exchange all their money or cannot exchange their loose change.
50. **Hold an "I'm Not Afraid" Auction.** You can do this with just a few friends or hundreds of people if you have enough items to auction. You survey a few people (and use your own common sense) about what things need to be done in their home or office that they are afraid of or would really not rather do. This is different from a service auction – there has to be an element of dread in the activity. For example, some people cannot wash their second story windows because they suffer from vertigo. If you are not afraid of heights you can sell your window-washing service (bring a sturdy ladder). This goes for drain cleaning, minor roof repairs, etc. Or if you are unafraid of cockroaches or spiders, you can offer to clean out that dark corner or garage or basement for a small fee.
51. **Similar to the suggestion above is the "Details Auction".** This is for all your friends whose desks are overflowing with papers or who can't get their receipts in order to give to the tax preparer or who complain they can never find anything. If you are a well-organized person, offer to clean up their desk, get their rolodex in order, file their

papers, etc. If you like to show, sell that to people who don't and do their holiday shopping for them or buy birthday, baby shower or niece/nephew presents for them.

52. **Find out which of your friends (perhaps this is true for you also) work in corporations with matching gift programs.** Then ask them to donate and get their gift matched for your organization and ask them to ask their co-workers to donate and get their gifts matched.

53. **Think of a store or service related to your organization or where a lot of your members shop.** Ask the store to donate a percentage of profits for a certain day or week, or even forever. You can also explore this with mail-order firms. Then you advertise widely to friends, family and members that Joe's Florist will give 2% of each sale during Valentines weekend to anyone identifying themselves with your group.