

# Fund-Raising Responsibilities and Opportunities for Nonprofit Board Members

How many are **YOU** willing to consider and undertake?

## MARK EACH ACTIVITY:

**Y** = Yes    **M** = Maybe (limit 10)    **N** = No    **?** = Don't Understand

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

## LEVEL 1

#	Activity	Y	M	N	?
1	<b>Commit</b> to the organization's vision and mission. Be willing to learn more about how to "give and get" contributed resources.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2	<b>Provide insight and input</b> into a marketing-driven plan: help decide which goals deserve priority given organizational capabilities, resources, depth of volunteer commitment, and relevant strategies for implementation.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3	<b>Aid in the development of and support</b> a fund-raising 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.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4	<b>Assist in drafting</b> the fund-raising case statement—a comprehensive justification for charitable support—and be able to <b>explain</b> this rationale persuasively.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5	<b>Decide realistic budget allocations</b> for the organization's fund-raising program. (Be patient about how fast new income will be received, but ask questions, offer suggestions, and operate by agreed upon procedures and assignments.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6	<b>Review, critique, and monitor</b> the action strategy. This is a policy and procedure outline of how and when the program is to be implemented (for example, type of fund-raising 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.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7	<b>Understand</b> the organization's financial situation and probable future funding position. <b>Oppose</b> quick fixes and short-range decisions. <b>Probe</b> until you become convinced money is wisely used and staff accountable. <b>Insist</b> that the board get serious about the necessity of "fiscal fitness."	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

#	Activity	Y	M	N	?
8	<b>Evaluate</b> fund-raising progress by asking friendly, but searching-questions with: 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 fund-raising as a marathon, not a sprint. Sustained momentum is the key to success.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9	<b>Join and get active</b> on at least one board committee and be alert for how its work can strengthen current fund-raising endeavors. (Almost every aspect of the operation has some impact on development, directly or indirectly.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10	<b>Support</b> the chief executive's leadership and their management of staff. (If that ever becomes difficult, talk with the board chairperson or the chief executive about your concerns and offer to aid in finding solutions.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11	<b>Approve</b> the creation or revision of a board member statement of responsibilities that includes clearly defined expectations for trustee personal giving and involvement in fundraising.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
12	<b>Help the board establish</b> goals for board giving.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## LEVEL 2

#	Activity	Y	M	N	?
13	<b>Provide</b> the names, address, and email contacts of donor prospects for the development prospect list. Share pertinent (not private) information about your contacts: individual preferences, interest level, any misgivings about the cause, and their inclination to donate money.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
14	<b>Volunteer</b> to supplement the work of development staff as requested. For instance, proofread material, take committee minutes, fill in for staff where appropriate, prepare mailing packages, help set up a room, or locate what is needed for a productive meeting.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
15	<b>Include</b> the organization in your annual charitable giving.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
16	<b>Attend</b> training workshop(s), to discover how to better carry out your role and augment the overall development process.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
17	<b>Recruit</b> volunteers and prospective helpers. Suggest ways to interest and involve people with whom you or your friends are acquainted.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

#	Activity	Y	M	N	?
18	<b>Advocate</b> for the organization or cause. Serve as an enthusiastic community relations representative. Understand the organization's mission and programs and be able to answer common questions. <b>Prompt</b> others in the community to begin participating in the work of the organization. <b>Share</b> and/or repost organizational information on your social media platforms.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
19	<b>Originate</b> introductions and access to individuals or groups where you have credibility and influence. <b>Cultivate</b> prospects and donors on a regular basis.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
20	<b>Distribute</b> (hand-deliver) invitations or promotional material to targeted markets: individuals, businesses, churches, temples, community groups, or clubs.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
21	<b>Facilitate</b> engaging in a wider range of media contacts for increased visibility and promotion. <b>Link</b> your organization with regional councils, societies, or associations. <b>Seek</b> out wider sponsorship for events, programs, or educational sessions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
22	<b>Offer to be a spokesperson</b> for your organization at some specific occasion or event.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
23	<b>Find and relay</b> 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.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
24	<b>Brainstorm</b> innovative ways to thank and recognize donors. For instance, arrange a special "thank-a-thon" where donors are phoned to express gratitude for their contributions, with no solicitation included in the conversation.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
25	<b>Research</b> individual prospects, foundations, and corporate funding sources through public information sources. <b>Locate</b> promotional partners or establish a joint venture. Summarize your findings for staff or committee use.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
26	<b>Write</b> a personal testimonial, letter, email, social media post of support for public use, or agree to be quoted as to why you support the organization.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
27	<b>Hand-deliver</b> thank-yous, acknowledgments, or special awards to volunteers, contributors, or support groups.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
28	<b>Assist</b> in fund-raising special events, such as auctions, fairs, bazaars, open houses, tours, or tournaments. <b>Enlist</b> others to help in ways that they perceive are useful and fun, so they will want to do it again. <b>Welcome</b> newcomers: circulate and mingle to spread a friendly spirit, learn names, and discover common ground.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

#	Activity	Y	M	N	?
29	<b>Participate</b> in an evaluation session, during which you help campaign leaders gather the information they need about giving patterns and capacity of identified prospects.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
30	<b>Sell</b> products, tickets, or premiums where proceeds directly benefit your organization. <b>Collect</b> and/or solicit for silent auction items.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
31	<b>Visit</b> a community leader to explain needs to be met and accomplishments of the organization. Initiate follow up to sustain and increase interest.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
32	<b>Host</b> – 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).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## LEVEL 3

#	Activity	Y	M	N	?
33	<b>Contact</b> local businesses and vendor suppliers to seek in-kind donations, such as supplies, equipment, technical assistance, or personnel (interns, released time, loaned executives, etc.).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
34	<b>Personalize</b> the annual direct mail program or other endorsed campaign by using at least two of the following techniques: <ul style="list-style-type: none"> <li>• Hand address envelopes for use with top donors.</li> <li>• Add a personal P.S. or thank-you on the prepared acknowledgment.</li> <li>• Compose and send your note, email or text message of appreciation for a gift.</li> <li>• Send your own appeal (samples can be provided) to selected persons via email or mail</li> <li>• Phone to thank some of those who responded.</li> <li>• Communicate via social media the work and impact of the organization by sharing, liking the organization's posts.</li> </ul>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
35	<b>Increase</b> 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.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
36	<b>Request</b> a pledge or a contribution from designated prospects or lapsed donors in a group phonathon or on your own, within a prescribed time frame.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
37	<b>Solicit</b> a cash contribution from a service club, civic group, church, or temple, or request a gift for a particular promotion or publication.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

#	Activity	Y	M	N	?
38	<b>Accept</b> a leadership role to organize solicitation teams or a specific campaign. Before your term is completed, enlist your replacement.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
39	<b>Consider</b> making your organization part of your charitable estate planning through a bequest or life income plan.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
40	<b>Allow</b> your organization to share your financial commitment to the public to raise awareness of the cause and stimulate others to give.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
41	<b>Ask</b> selected individuals for a specific gift or a multi-year pledge, going to see them personally, accompanied by a staff member or another volunteer.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
42	<b>Create</b> a social media campaign to raise awareness of contributions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## ACTION PLAN

### Top Activities I Plan To Commit To:

### People I Intend to Engage:

Adapted from *Fearless Fundraising for Nonprofit Boards Second Edition (BoardSource)*, Dave Sternberg, CFRM