FUNDRAISING CHECKLIST

Fundraising Checklist

In these difficult economic times it is important to examine carefully the cost/result effectiveness of your organization's fundraising programs and activities. This calls for an assessment no less critical and perhaps no less daunting than a careful examination of our own budgets.

The following *Checklist* has been designed to assist organizations in assessing the cost/result effectiveness of their fundraising programs and activities. The *Checklist* is divided into the following sections:

- **Financial Overview**

- **Fundraising Overview**

- **Major Funding Needs**

- **"Case" Statement**

- **Volunteer Leadership**

- **Potential Major Donors**

- **Administrative Systems and Procedures**

FINANCIAL OVERVIEW

1. Our organization's annual operating expenses/current budget over the past five (5) years:

    Fiscal Year: $_____: fiscal year from _____ to _____
                                                             (month)   *(month)*

    Fiscal Year: $_____

    Fiscal Year: $_____

    Fiscal Year: $_____

    Fiscal Year: $_____

    Noted extraordinary financial results which may reflect "skewed" results in any one or more years:
    _____
    _____

3. Most recent balance sheet asset value of endowment funds: $_____

    Noted comments regarding endowment funds:
    _____
    _____

4. Our organization's annual revenues and expenditures attributable to fundraising over the past five (5) years:

Fundraising Revenues	*Fundraising Expenses*
Fiscal Year: $_____	$_____
Fiscal Year: $_____	$_____
Fiscal Year: $_____	$_____
Fiscal Year: $_____	$_____
Fiscal Year: $_____	$_____

5. Our organization's primary funding needs, with related projected dollar amounts, which are being represented to encourage gift and grant support:

$_____for:_____

$_____for:_____

$_____for:_____

$_____for:_____

$_____for:_____

6. Additional financial information which may be helpful when assessing fundraising costs and effectiveness:

_____

_____

_____

_____

_____

_____

FUNDRAISING OVERVIEW

1. The names and position titles for our current fundraising professional and support staff (fulltime (f/t) and part time (p/t) :

_____

_____

_____

_____

_____

_____

2. Current fundraising staff positions we are/are not currently seeking to fill:

_____

_____

_____

3. Nomenclature we currently use for "sizing" our gift levels, i.e. major, special, general:

Gift Nomenclature	Gift Size/Range	Est. Number of Donors at the Level
_____	$_____	_____
_____	$_____	_____
_____	$_____	_____
_____	$_____	_____

4. The largest gift(s) our organization has received over the past 3 years for the indicated specific purpose(s):

_____

_____

_____

_____

5. The principal way(s) we seek to identify new potential donors are:

_____

_____

_____

_____

_____

6.   Our fundraising revenues are generated through the following fundraising methodologies:

Est. Percentage of
Total Fundraising Revenues

Personal/Major Gift Solicitation	_____ %
Direct Mail Solicitation	_____ %
Telephone/Telemarketing	_____ %
Special Events	_____ %
Foundation Grants	_____ %
Other	_____ %: _____

7. Our organization has received the following significant estate planned gifts over the past 3 years:

Type of Planned Gift	Face Value	Current Present Value
_____	$_____	$_____
_____	$_____	$_____
_____	$_____	$_____
_____	$_____	$_____

MAJOR FUNDING NEEDS

1. The following are major funding needs for which we are currently seeking gift and grant support, or intend to do so within the next few years.

Major Funding Need	Estimated Funds Required
_____	$_____
_____	$_____
_____	$_____
_____	$_____

2. Our organization has conducted a major fundraising campaign within the past 5 years, with the following results:

Campaign Years	Major Funding Needs Represented	Funds Raised
_____	_____	$_____
_____	_____	$_____

"CASE" STATEMENT

1. The most compelling reasons given to potential donors to encourage their gift and grant support are:

   ➤ _____

   ➤ _____

   ➤ _____

   ➤ _____

2. Our current donor recognition categories along with privileges and benefits are:

   Donor Recognition Category   *Privileges/Benefits*

   _____   _____

   _____   _____

   _____   _____

   _____   _____

   _____   _____

VOLUNTEER LEADERSHIP

1. Our organization's governing board (☐ Trustees   ☐ Directors   ☐ Governors   ☐ Other) is authorized to have _____ members, of which we currently seat _____ members.

2. Our governing board meets: ☐ monthly   ☐ quarterly   ☐ semi-annually   ☐ annually

3. The current terms of office of our governing board members are _____ years.

4. The following are annual contributions made by members of our governing board:

	Total Giving	*Number of Board Members/Contributors*
Fiscal Year:	$_____	_____/_____
Fiscal Year:	$_____	_____/_____
Fiscal Year:	$_____	_____/_____
Fiscal Year:	$_____	_____/_____
Fiscal Year:	$_____	_____/_____

5. The following are the titles of our governing board's current Standing Committees:

_____

_____

_____

_____

_____

_____

6. Our governing board's current method for evaluating board member performance as well as the entire board's leadership effectiveness is through:

_____

_____

_____

_____

7. The stated policy with respect to the governing board's involvement in fundraising is:

_____

_____

_____

_____

8. In addition to our governing board the following formal or informal volunteer groups are involved in fundraising for the organization: *(For example: Advisory Board, Auxiliary)*:

_____

_____

_____

_____

POTENTIAL MAJOR DONORS

1. We have to-date identified approximately the noted number of potential donors at the following gift "target" gift levels:

    $ 1 million and above: _____

    $ 100,000 and above :   _____

    $ 10,000 and above: _____

    $ 1,000 and above: _____

2. The following are primary ways we personally engage potential major donors with the organization in order to eventually encourage their gift and grant support:

    _____

    _____

    _____

    _____

    _____

    _____

ADMINISTRATIVE SYSTEMS AND PROCEDURES

1. We currently have _____ "addressable" records in our computer database.

2. Our current fundraising software is: _____

3. Some features or capabilities of our software we would like to improve on are:

   _____

   _____

   _____

4. The manner in which gifts are acknowledged, and donors thanked includes:

   _____

   _____

   _____

   _____