



Board Member Assessment Tool for Personal Fundraising

While some individuals who sit on Boards are personally quite wealthy and able to simply write a large check, others are not in that same position. And, even if individuals are able to “give” their donation rather than “get” that amount elsewhere, Board members should all be actively engaged in spreading awareness and building affinity for the organization and recruiting supporters and donors from their personal contacts.

Board members often struggle with fundraising. Which contacts should I approach? How should I ask them to contribute? Can I ask the same person more than once? Is there a right or a wrong time to solicit contributions? What are the best strategies? The following is an assessment tool to help you answer some of these key questions as you think about conducting fundraising.

Assessment

1. Questions to assist you in thinking about how to sell the organization to potential funders:

- What’s my personal connection to the mission of the organization?
- Why do I commit my time and energy to the organization?
- What impresses me most about the organization?
- What is it about the organization that most excites me?
- Why do I donate to the organization? Why do I think others should?
- What is the benefit of the organization to the community?
- Why invest in the organization?
- Why is a donation to the organization a good investment?
- What is the benefit for potential donors?

Notes and ideas:

2. Questions to help you identify a personal fundraising goal:

- How much have I previously raised for the organization?
- How much can I personally give to the organization?
- How much have I previously raised for other organizations?
- Do I have personal connections with individuals with “deep pockets”? How close are those connections? How many of them do I have?
- If I have previously solicited for the organization, how many of these were one time only gifts and how many are prospects for additional gifts?
- If I have never solicited for the organization but have done fundraising for other organizations, are there donors I have asked in the past that would have an interest in the organization and might be good prospects? How many and at what level?
- What would be a “stretch goal” but one that still feels realistic?

Notes and ideas:-

3. Questions to assist you in identifying potential individual donor prospects among your family, friends, colleagues, neighbors, etc.:

- Who in my world has a first-hand connection to and/or investment in the mission of the organization?
- Who in my world is politically active?
- Who in my world is philanthropic towards related causes or organizations?
- Who in my world cares enough about me and what’s important to me to participate?

Notes and ideas:-

4. Questions to assist you in identifying organizations, corporations, or businesses you might approach as prospective donors:

What organizations, corporations, or businesses with whom I am affiliated (because I am a customer, neighbor, colleague, friend, etc.) might be interested in funding the organization because they fit one of these three descriptors:

- (1) Their mission is an exact fit with The organization;
- (2) They support similar issues;
- (3) They win if the organization wins;
- (4) They know me, like me, trust me, respect me, or “owe” me!

Explanation and Examples:

Their mission is an exact fit with the organization: This includes organizations, businesses, or corporations whose sole purpose is the same as yours. Note that this may not be a large universe of possibilities and some may actually be competitors of the organization and, therefore, not approachable for a donation.

Notes and ideas: _____

They support similar issues: These would be organizations or corporations that support and focus on issues related or connected to your mission in some way.

Notes and ideas: _____

They win if The organization wins: This is a broad category that could include organizations that benefit in a variety of ways if the organization is successful in its fundraising and successful in its mission. This would include those who depend upon the direct services and advocacy of your organization, your clients/customers, your vendors, etc. Notes and ideas: _____

They know me, like me, trust me, respect me, or “owe” me: This is a very open-ended category but a very important one! These are corporations and organizations with whom you have a strong personal connection. Examples: Corporations and organizations you interact with in your professional life and have a good relationship with such as customers, clients, and partner organizations, groups that you have financially supported and might feel it important to reciprocate, local businesses that you patronize frequently and/or are owned by individuals you interact with socially, and corporations that are owned or headed up by friends or family members.

Notes and ideas: _____

5. What are the specific fundraising strategies I would be willing to utilize?

- Make direct asks of individuals on my prospect list (phone, email, face to face)
- Make direct asks of organizations or corporations on my prospect list (phone, email, face to face)
- Make direct asks of individuals or organizations on the organization’s prospect list (i.e. volunteer to be the face of The organization to make the ask because you are a Board member, not because you know the individual)
- Host a house party, reception, or other social event
- Recruit others to host a house party, reception, or other social event
- Other: _____
- Other: _____