

Fund-Raising Evaluation

Give this evaluation tool to board members before launching an annual campaign or during the self-assessment process. Board members should answer yes or no to every question, and then think of ways they can turn each no answer into a yes.

1. Do I understand the plans and program for fund-raising?
YES NO
2. Do I understand and endorse the reasons why someone should contribute?
YES NO
3. Do I contribute to the fullest measure within my means?
YES NO
4. Do I continually offer additions to the mailing list?
YES NO
5. Do I assist staff in identifying and evaluating prospects — individuals, corporations, and foundations?
YES NO
6. Do I share in cultivating key prospects?
YES NO
7. Do I make introductions for others to make a solicitation visit?
YES NO
8. Do I accompany others in solicitation visits?
YES NO
9. Do I write follow-up and acknowledgment letters?
YES NO
10. Do I write personal notes on annual appeal letters?
YES NO
11. Am I prepared to make a solicitation myself?
YES NO
12. Do I do what I say I will do?
YES NO