

Survey for Fundraising



A Nuts & Bolts tool
brought to you by
Nonprofit Sidekick.

These are suggestions - you will need to personalize this list to your organization's fundraising activities.

Ask Board Members to indicate their comfort level on a scale of 1 to 5 (with 1 being "no way, not gonna do that" and 5 being "i LOVE to do that") of the following:	1 No Way	2	3	4	5 Love This
Plan events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Execute events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Host events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Speak at events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Write thank you notes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Make thank you phone calls (these days, this is mostly leaving messages)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Review or write grant proposals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Research potential grant opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Introduce staff, development committee members, or other board members to potential donors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Host a meet and greet for the organization, invite your friends to get to know more about us and hear a donation pitch	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Present the donation pitch at that party or other board member's parties	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Meet with potential donors individually and with others to introduce them to the organization, build relationships and eventually make the ask.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Act as the board giving lead and meet with other board members about their giving, track board pledges and fulfillment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



Survey for Fundraising

continued

YOUR FUNDRAISING MAP - WHERE DO YOU NEED BOARD HELP?

1 EVENTS - list each of your events and then sketch out where you need the board member to lead or to act as helpers/doers at the event. How do you need the board to work with you to make the event successful? Be specific.

- Act as hosts/welcomers at the event
- Speak at the event
- Be a visible donor at the event if there is a voice auction
- Plan the event
- Manage the auction
- What else?

How can they own it - what parts should they be fully responsible for and what parts are they helping others like staff or contractors or other volunteers?

2 GRANTS - below is a sample list of activities or responsibilities associated with foundation grants. Decide which parts would be good for your board to help with, if any.

- Research prospects
- Make phone calls to vet potential new funders
- Write grants
- Review/edit grants
- Write/research case statement or theory of change
- Introduce org to folks in their network with access to corporate or private foundation funding
- Act as host of foundation folks at events or site visits
- Write thank you letters

3 INDIVIDUALS - below is a sample list of activities or responsibilities associated with individual fundraising. Decide which parts would be good for your board to help with, if any.

- Share fundraising campaign information with their networks
- Help to create and design fundraising campaigns
- Manage social media for fundraising campaigns
- Create a fundraising team using an online peer-to-peer fundraising platform
- Host an event
- Ask their friends to attend an event
- Ask their friends to give money to the organization at an event
- Ask their friend to give money with a letter
- Ask their friends to give money via email/online platform
- Thank donors by calling them
- Write thank you letters
- Host donors for site visits or other events
- Develop relationships with donors, ie coffee with a donor to thank and update them

4 CORPORATIONS - below is a sample list of activities or responsibilities associated with corporate sponsorships. Decide which parts would be good for your board to help with, if any.

- Research prospects, including appropriate contacts
- Find connections within the org - staff, volunteers, board members
- Design menu of sponsorship packages
- Write proposals
- Follow up with corporate contacts
- Act as host for corporate funders at events or site visits
- Write thank you letters