

Fundraising Checklist: Management and Structure Basics

When your organization is ready to implement a development plan, the following questions should be addressed to be sure you are ready.

Is your organization incorporated?

Have you applied for classification by the IRS as a tax-exempt entity under Section 501 (c) (3)? Have you received the classification?

Do you have a board of directors with at least five members or as outlined in your bylaws?

Does your board include a variety of individuals and include local business owners? It is ideal to add a lawyer, accountant, and business executive to your board.

Do you have biographic information on each board member (affiliations, educational background) and information on your top volunteers?

Does every board member have a copy of your bylaws, mission statement, long-range plan and yearly budget?

Are your bylaws reviewed on a regular basis?

Do you hold an annual board meeting?

Are your financial records audited annually by an independent outside accountant? Is the report an "unqualified" report?

Has the board approved and adopted a written mission statement? If not are you working on one?

Has the board approved and adopted a long-range strategic plan (3-5 years)? It should cover long-range program goals, specific needs you will meet, kinds of people/pets you serve, and answer why your organization is deserving of support.

Has the board approved a plan for fundraising for the coming year? It should be based on your mission statement, respond to the community needs, include your long-range goals, have a short-term measurable objective, and include a budget or staff and volunteer time and money.

Do you issue an annual report?

Do you have a formal written agenda for each board meeting that includes a review of the current budget and discusses current fundraising plans and budget?

Fundraising Checklist: Annual Fundraising Checklist

Have you reviewed with the board conditions in your community that may affect the ability to raise funds?

Do you have data on economic conditions, demographic information of the population in your community (age, income level), special interests in your community (boating, golfing), and information about what are acceptable fundraising practices?

Have you discussed and have a written plan for possible sources of support? Should include individuals that are likely to give to your cause, civic groups, religious institutions, social clubs, corporations, foundations/charitable funds, federated funding sources such as United Way, and local, county, state and national government sources.

Do you have evidence indicating what people think of your organization? Formal endorsements, unsolicited letters, and clippings.

Have you decided on the best ways to approach each group for support?

Do you communicate regularly with these groups?

Does your organization have board members, volunteers, or staff who are members, volunteers, or staff in any of these groups?

Are your board members recognized as leaders in these groups or in your community?

Does your plan include spending more on activities that have produced good results that might do better with more effort and planning?

Is there a fundraising committee on your board?

Has a staff or board member been assigned primary responsibility for your fundraising plan? Does this person have access to all board members and regularly attend board meetings?

Does your organization have a plan of publicity and community relations that is written and board approved?

Does the person responsible for your fundraising plan have access to the person that handles your publicity/community relations?