

IS YOUR BOARD DEVELOPMENT COMMITTEE DOING THESE 10 TASKS? IT SHOULD BE.

A Checklist for a Top-Level Board **Development/Fundraising Committee**

Ensuring that your organization has adequate resources to function effectively is one of the board's key responsibilities. This means that boards must be actively engaged in guiding and supporting their organizations' fundraising efforts.

Many boards create a board development committee to coordinate and oversee the board's work in this area. Its members are active in developing fundraising plans and in engaging the entire board in fundraising. They work closely with the CEO/executive director and the development staff.

The development committee's responsibilities may include, but are not necessarily limited to, the following. Keep in mind that your list may depend on whether you have staff to help coordinate your organization's fundraising efforts and may change as your organization grows.

Help develop policies for board and staff actions related to gift solicitation and recognition.

The intricate relations with donors require close coordination between board members and fundraising staff. Written guidelines should clarify the roles of the board, individual board members, the CEO/executive director and development staff, and all those who participate in cultivation and solicitation activities. The board should approve the following job descriptions and policies:

- Development committee job description/charge
- CEO/executive director job description
- Development director job description
- Board member fundraising policy
- Donor relations policy
- Gift acceptance policy
- Sponsorship policy

Help to set fundraising goals and develop and monitor resource development strategies.

No development effort is effective without a comprehensive plan. While staff members usually are in the best position to prepare a draft of the development plan, the development committee is in a key position to lend its expertise by helping set financial goals; analyze and choose the appropriate strategies to meet those goals; determine where board involvement can be best leveraged; and develop criteria to evaluate results and then monitor performance to determine if strategic adjustment is needed. The full board is responsible for approving the fundraising plan.

Motivate and involve all board members in the fundraising process.

Every board member should be involved in fundraising individually, based on his or her skills and abilities. The development committee should evaluate every member's strengths and readiness to raise funds, determine which tasks match his or her abilities and comfort level, and work with staff to assign achievable duties. Training, coaching, and mentoring is a good way to motivate and prepare board members for making personal calls and asking for gifts based on their belief in the case for support rather than on their personal relationships. Reluctant board members can be introduced to fundraising by taking part in its less intimidating aspects, such as writing gift acknowledgment letters.



Ensure that your organization's case for support is strong, current, and based on your organization's mission and goals.

The case for support defines all the possible reasons why a donor should support your organization.

It focuses on the external, societal needs to be filled and addresses the following components:

- Organizational mission
- Goals, objectives, programs, strategic plan, and history
- Character of governing board, strength of staff, and effectiveness of facilities
- Need for support

Provide information on environmental factors affecting fundraising among your organization's constituencies.

Development committee members should be knowledgeable about the organization's community and its constituencies and use this knowledge to ensure that the organization sets realistic fundraising expectations. Internal financial needs are only one factor in the amount of funds that can be raised. The external environment and economic conditions should be considered as well.

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Develop expectations for personal financial contributions from the board, communicate those expectations, provide leadership by giving, and ensure that all board members make a personal financial contribution.

All board members should place your organization as one of their top charities during the period of their term of office. By establishing a policy of personal giving by board members, communicating it during the recruitment process, and enforcing it, the committee and board set an example and send a message that its board members believe in the cause. While the committee should encourage all board members to make an annual stretch gift that is within their means, this duty is not about the amount each member gives, but rather it is about achieving full participation.

Participate actively in special fundraising events.

While special events are the least cost-effective means of raising money and are highly staff intensive, they often increase an organization's visibility and provide a venue for sharing information about the organization's needs. Committee members can assist by leading, directing, and hosting such events with staff support; arranging tables of prospects and donors as their guests at benefit events; and adding their signatures to event invitations.



Provide information about potential new prospects; help to evaluate existing donors for increased contributions.

Development committee members should reach out to the full board to provide names of individuals and entities that can be considered as potential new donors based on linkage, ability, and interest as well as to review lists of new prospects that the development staff has identified for future support. Linkage indicates there is a connection between the prospective donor and an individual associated with the organization; ability means the prospective donor has the means to make a gift at a particular level; interest means the individual has an interest in the organization's mission.

The committee also should assist in evaluating the linkage, ability, and interest of existing donors to determine if they might be asked to give at a higher level and then help develop strategies for building partnerships with donors that lead to larger gifts.

Solicit gifts at levels required.

Development committee members should be trained to ask for gifts based on the case for support and then, in partnership with staff, become actively involved in solicitation. It is widely recognized that current and prospective donors appreciate this level of personal attention from board members.

Monitor fundraising performance and hold the board and organization accountable.

In partnership with staff, the development committee should establish quantifiable goals for fundraising in the form of performance objectives. Performance criteria might include timetables for completion; documentation of stewardship activities; results for each fundraising method and technique; and reasonable cost guidelines for effective and efficient use of budget, staff, and volunteers. Ideally, the committee should review quarterly summaries of performance on every fundraising activity and gift reports. With clear information, committee members can more easily see where improvements lie and what adjustments might be necessary to meet goals.

The committee should also oversee the faithful use of all funds received in accordance with donor restrictions, accounting standards, and legal and ethical requirements.

Resources:

[Development Committee by Eugene R. Tempel](#)

[Fundraising Responsibilities of Nonprofit Boards by James M. Greenfield](#)