

# Board Fundraising Checklist

Is your board set up for fundraising success? Use this checklist to ensure that you are setting the right expectations for your board members and are empowering them to be both fundraisers and advocates for your nonprofit.

- We give board members a clear job description that addresses their fiscal, legal, and fundraising responsibilities.
- When we recruit new board members, we offer them a structured orientation process that introduces them to their role and responsibilities as a board. In the orientation, we provide a:
  - ✓ **Organizational overview:** a comprehensive summary of your organization's mission, vision, strategic plan, programs, and finances.
  - ✓ **Fundraising overview:** an outline of your organization's fundraising results, campaigns, the board's role in supporting these fundraising efforts.
- Our board members understand their role as ambassadors, connectors, and/or solicitors. They agree to participate in donor stewardship practices like writing donor thank yous or calling donors to thank them for their gifts. [LEARN MORE>](#)
- Our board members have a handful of "elevator pitches" they can share with community members to demonstrate our impact and to help interested parties learn more about our mission.

We provide our board members with templates they can use to:

- ✓ Have an effective donor thank you phone call.
- ✓ Write thoughtful donor thank you emails and notes.
- ✓ Raise money through a peer-to-peer fundraising campaign. [LEARN MORE>](#)

- We have an active development committee that's made up of board members who provide strategic oversight of fundraising at our nonprofit and serve as good examples of how board members can and should engage in fundraising activities.
- We regularly report fundraising results to board members, including our donor retention rate, average gift size, board member donations YTD, and donor engagement metrics (email open rates, event attendance, and response rate to recent appeals).
- Our staff is dedicated to ensuring our board meetings are efficient and effective.
- We show appreciation to our board members and recognize their valuable contributions to our organization's mission.

**Set your board up for success: download our latest eGuide,  
[How to Manage and Inspire Your Nonprofit's Board.](#)  
Need fundraising software that is complete, but not complex? [Talk with us!](#)**

