

LISA HOFFMAN • COACH • CONSULTANT

lisa@lisahoffman.net • www.lisahoffman.net

HELPING PEOPLE & NONPROFITS THRIVE!

Board Fund Development Accountability Checklist

Board Governance and Recruitment

- ✓ Written board role roles and responsibilities description.
- ✓ Individual Board member agreement that articulates responsibilities and specific expectations – renewed each year.
- ✓ Potential board members are informed:
 - of specific fund development commitment expected of all board members and given written role description;
 - that each has opportunity to choose fund development activities that play to his or her strengths, comfort level and network;
 - that each receive ongoing training and support from staff (or equivalent position in all-volunteer organizations) and board leadership in relationship to fund development.
- ✓ Board members are trained and provided with talking points on how to talk about fund development to potential board members.

Development Practices and Systems

- ✓ Appreciation of board members and their fund development commitment is ongoing, both formally and informally: appreciation takes place within individual relationships, and at board and committee meetings.
- ✓ Annual fund development agreement, completed and signed by all board members, indicates annual personal gift amount, and specific fundraising activity commitments.
- ✓ Staff works with individual board members to support/remind them of their fund development activities.
- ✓ Staff systematically briefs executive director, development committee/appropriate board leadership (chair, development chair) on board members' fund development follow through.

Board Leadership and Involvement

- ✓ Board leadership consistently reminds board members at meetings of boards fund development responsibilities.
- ✓ Board and organizational progress to fund development goals are reviewed at each board meeting by chair or development chair.
- ✓ Development director (or appropriate staff or volunteer), coordinating with ED, apprises development committee (or appropriate committees/board leadership) of board members having trouble with fund development activity commitments.
- ✓ Development committee decides how to individually approach each board member having trouble with development activity commitments.

- ✓ Appropriate board leadership supportively works with board members having trouble fulfilling their fund development activity commitments to determine if there is an issue that can be resolved, or if the board members activities need to be changed/reassigned.
- ✓ Development/Governance/Executive Committees deal with Board members who are unable to fulfill their fund development commitments.

Evaluation

- ✓ Annual evaluation of board as a whole and individual board members self evaluations include fund development.
- ✓ Evaluation findings are reported to board, which agrees on any necessary action/follow-up.