

Board Member Self-Evaluation: Fund Development

Yes _____ **No**
(circle one)

Board Ambassador Role

- | | | |
|-------------------------------------------------------------------------------------------------------------|-----|----|
| 1. I can confidently recite our organization's 30 second elevator speech. | Yes | No |
| 2. I know our organization "by the numbers"
(# served annually, year founded, annual budget size, etc.). | Yes | No |
| 3. I am well-versed with our organization's finances, operations and needs. | Yes | No |
| 4. I seek opportunities to tell their story in my professional and personal life. | Yes | No |
| 5. I have told our organization's story to someone within the last 3 months. | Yes | No |

Financial Contribution

- | | | |
|-------------------------------------------------------------------------------|-----|----|
| 1. I make a personal annual donation at a level that is significant to me. | Yes | No |
| 2. I am a member, if applicable. | Yes | No |
| 3. I seek opportunities for my employer to contribute (financial or in-kind). | Yes | No |
| 4. I have considered leaving our organization in my will or estate. | Yes | No |
| 5. I have met my board "give or get" responsibility, if applicable. | Yes | No |

Event Contribution

- | | | |
|-----------------------------------------------------------------------------|-----|----|
| 1. I buy tickets/sponsorships to our organization's fundraising events. | Yes | No |
| 2. I attend our organization's performances, exhibits, program events, etc. | Yes | No |
| 3. I personally bring guests to our organization's events. | Yes | No |
| 4. I have encouraged my contacts to attend our events. | Yes | No |
| 5. I have volunteered my time before or during our organization's events. | Yes | No |

Door Opener Role

- | | | |
|---------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| 1. I actively seek opportunities to introduce our organization to my contacts. | Yes | No |
| 2. I have provided our organization with email introductions to my contacts. | Yes | No |
| 3. I have facilitated introductory meetings with my contacts. | Yes | No |
| 4. I have hosted an introductory reception for my contacts to our organization (in-home or work setting). | Yes | No |
| 5. I have escorted a member of the staff to attend an external event. | Yes | No |
| 6. I have facilitated speaking or networking opportunities for our organization in associations, service clubs or groups I belong to. | Yes | No |

Donor Stewardship (say thank you) and Cultivation

- | | | |
|------------------------------------------------------------------|-----|----|
| 1. I have personally signed thank you notes or letters to donors | Yes | No |
| 2. I have called a donor(s) to say thank you. | Yes | No |
| 3. I have met with a donor to cultivate their giving. | Yes | No |

Donor Solicitation

- | | | |
|-------------------------------------------------------------------------------------------------------------|-----|----|
| 1. I have provided names of potential donors for an appeal or event, even if I did not make the direct ask. | Yes | No |
| 2. I have personally signed letters of appeal to donors. | Yes | No |
| 3. I have sent a solicitation email to my contacts. | Yes | No |
| 4. I have directly solicited a donor for a financial contribution. | Yes | No |

MY COMMITMENT

Please complete all the sections you feel comfortable with.

I pledge to make a personal gift in this fiscal/calendar year in the amount of \$_____.

OR, I will make a recurring gift in the amount of \$_____, per _____.

I will support the success of our event(s) by.

1. _____
2. _____
3. _____

These are the names of three (3) people I will introduce to our organization.

1. _____
2. _____
3. _____

I would like to participate in thanking or cultivating donors by:

1. _____
2. _____
3. _____

To engage new donors, I will:

1. _____
2. _____
3. _____

I will support donor solicitation by:

1. _____
2. _____
3. _____

These are the names of three (3) people I will ask to make a financial contribution to our organization.

1. _____
2. _____
3. _____

COMMENTS / NOTES

Name _____

Date _____

