



Fundraising Checklist

XYZ ORGANIZATION

- Board members understand their fundraising responsibilities and are individually committed to giving to XYZ every year
- Board affirms basis for fundraising is written and followed by the development team
- Financial facts and descriptions about XYZ's financial condition are current, complete, and accurate
- Board understands XYZ's fundraising strategy and the use of restricted donations
- Statements regarding the use of gifts by XYZ in its charitable gift appeals are written and honored
- Board is aware of communication to givers regarding the potential of over-funding or under-funding projects for which funds are being raised
- For matching gifts, the board is confident initial pledges are legitimate and likely to be submitted
- Board ensures neither staff nor external fundraisers are compensated on the basis of funds raised
- Board affirms XYZ provides givers appropriate and timely charitable gift acknowledgments
- Board affirms XYZ provides a report, upon written request, that includes financial information on any project for which it is requested
- Board ensures the XYZ development team compiles, analyzes, and leverages giving data to serve and support the giving base
- Board affirms XYZ provides a copy of recent year-end financial statements upon request