

**DSA Best Practices
Board Member fundraising checklist**

Board Member Name: _____

Expectations on me as a board member of _____ during the year 20__.

- I will fully understand the plans and program for fundraising.
- I will understand and endorse the case why someone should contribute.
- I will add _____ people to the mailing list this year and I anticipate _____ (how many) will donate to (the organization).
- I will attend at least ____% of board meetings this year and serve on a standing committee or special project
- I will participate in or attend special events, when my presence is requested by the Executive Director.
- I will arrange for and/or make an organization presentation to a civic club, church group, business associate, house party or group of friends.
- I will make at least _____ person-to-person visits to individuals, foundations, businesses, or civic groups to request financial contribution for the organization.
- I will invite and accompany a friend or associate to visit the organization.
- I will recommend at least _____ potential candidates for Board membership to the Board Development Committee.
- I will secure at least _____ in volunteer, in-kind service or material goods for the organization.
- I will secure at least new donors for the organization.
- I will write personal notes on appeals for the organization.
- I will assist staff in identifying and evaluating prospects-individuals, corporations and foundations?

Evaluating Board Members: An Annual Checklist

Yes___No___ Attends Board meetings regularly.

Yes___No___ Prepares adequately for board meetings.

Yes___No___ Participates constructively in meetings.

Yes___No___ Is accessible to the the Executive Director, management staff and works cooperatively with them.

Yes___No___ Supports majority decisions.

Yes___No___ Listens well; respects those whose opinions differ.

Yes___No___ Offers constructive criticism: responds well to it.

Yes___No___ Appropriately asks questions and expresses opinions to fellow board members, to the Executive Director and staff.

Yes___No___ Actively promotes our organization in his/her sphere of influence.

Yes___No___ Makes a personally significant financial contribution to the organization, at least once annually.

Yes___No___ Tries to know fellow board members on a personal/social basis.

Yes___No___ Explains positions on issues clearly to fellow team members.

During Board Meetings:

Yes___No___ Listens to fellow board members; demonstrates respect for them.

Yes___No___ Explains positions on issues clearly to fellow board members, executive staff.

Yes___No___ Keeps disagreements from carrying over to other items on the agenda.

Yes___No___ Works for a genuine consensus instead of forming “voting blocs” with other board members.

Yes___No___ Gracefully accepts the need to, from time to time, go along with a majority decision he/she opposed.

Yes___No___ Leaves disagreements at the table when the meeting is over.

© MAZON: A Jewish Response to Hunger 1993