

## **Board Readiness Assessment**

Board members play a variety of roles for nonprofit organizations. We are concerned primarily with their roles in fundraising.

Using the following questionnaire and keeping the *entire board* in mind, work with each other to determine the best answers to each question. At the end of the survey, write a brief paragraph describing areas of improvement needed (if any) to enhance the board's role in fundraising.

*Note: This questionnaire appears in Principles & Techniques of fundraising (2010) published by The Fundraising School at the Center on Philanthropy at Indiana University.*

***ASSESSMENT BEGINS ON NEXT PAGE***

**NAME OF THE ORGANIZATION:** \_\_\_\_\_

**NAME OF PERSON COMPLETING THE FORM:** \_\_\_\_\_

**EVALUATION FORM—YOUR BOARD AND FUNDRAISING\***

Rate your board on a 1-to-5 scale when it comes to fundraising. A “5” indicates your board is well-prepared; a “1” means your board and you need to take appropriate steps in order to engage board members in fundraising. Adapted from work by Wilcox, Ault, and Agee (1989).

- |      |  |              |
|------|--|--------------|
| I.   | Awareness. Your board...   | Rating (1-5) |
|      | a. Understands the organization’s mission.   | _____        |
|      | b. Is committed to the mission.  | _____        |
|      | c. Believes your organization’s cause is worthy.   | _____        |
|      | d. Has ownership, pride, and enthusiasm for the cause.   | _____        |
|      | e. Realizes the importance of fundraising in supporting the cause.   | _____        |
|      | f. Has received adequate reports on fundraising activities.  | _____        |
|      |  |              |
| II.  | Interest. Your board...  | Rating (1-5) |
|      | a. Asks questions about fundraising.   | _____        |
|      | b. Seeks more information on fundraising activities.   | _____        |
|      | c. Serves as spokespersons on behalf of the cause.   | _____        |
|      | d. Understands that fundraising is 90% preparation and 10% asking.   | _____        |
|      | e. Realizes that many roles are valuable in fundraising (not just asking.)   | _____        |
|      | f. Participates in activities such as identifying and qualifying prospects, participating in direct mail, and representing the organization. | _____        |
|      |  |              |
| III. | Evaluation. Your board...  | Rating (1-5) |
|      | a. Interacts positively with peers and staff in fundraising activities.  | _____        |
|      | b. Is willing to take specific assignments.  | _____        |
|      | c. Receives fundraising reports regularly and reads them.  | _____        |
|      | d. Receives recognition for fundraising efforts.   | _____        |
|      | e. Participates in planning for fundraising.   | _____        |
|      |  |              |
| IV.  | Trial. Your board...   | Rating (1-5) |
|      | a. Is willing to make personal calls if appropriately paired with another volunteer or staff.  | _____        |

- b. Discusses fundraising with peers. \_\_\_\_\_
- c. Recruits other volunteers for fundraising. \_\_\_\_\_
- d. Shares enthusiasm and success stories with the board. \_\_\_\_\_
- e. Serves as ambassadors to constituent groups. \_\_\_\_\_
  
- V. Adoption. Your board... Rating (1-5)
- a. Believes in fundraising and participates actively in fundraising. \_\_\_\_\_
- b. Has an active fundraising committee. \_\_\_\_\_
- c. Assumes responsibility for specific fundraising tasks. \_\_\_\_\_
- d. Ensures the financial stability of the organization. \_\_\_\_\_
  
- VI. Briefly describe two areas of improvement needed to enhance the board's role in fundraising.