Board Engagement in Fundraising Survey – Example

***Disclaimer**: This document is not intended as legal advice. Your organizational goals, purpose, bylaws, and values should drive the creation of this document.*

The board and staff often don't know where to start to engage the board in fund development work. A survey can help align interests, manage time, eliminate assumptions, and acknowledge the gaps in effort. A tool like this can also indicate where training and support are needed to help the whole team succeed. The options in the survey are based on each organization's fundraising plan, organizational culture, and values. The goal is not to get everyone to do the same thing but to help each person find the way they can contribute to the overall success together. A survey like this is best completed annually to allow for new options for engagement and new people taking on new roles.

***Your Name*_____**

	Like/Will Do	Hate, But…	Don't Know, Try Me!	I'll recruit others to help
Develop Friends and Donors				
Make a personal financial investment	_____	_____	_____	_____
Serve on the board fundraising committee	_____	_____	_____	_____
Help engage the board in fundraising	_____	_____	_____	_____
Attend a fundraising training	_____	_____	_____	_____
List personal contacts	_____	_____	_____	_____
Brainstorm ways to involve my contacts	_____	_____	_____	_____
Call or write letters to my personal contacts	_____	_____	_____	_____
Do research on potential donors	_____	_____	_____	_____
Call or write donors to say thank you	_____	_____	_____	_____
Take a donor or prospect to a mission-based event	_____	_____	_____	_____
Personal Solicitations				
Meet one-on-one with donors	_____	_____	_____	_____
Do team solicitation	_____	_____	_____	_____
Go to groups and make presentations	_____	_____	_____	_____

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Special Fundraising Event				
Serve on the special events committee	_____	_____	_____	_____
Help do promotions and marketing event	_____	_____	_____	_____
Sell tickets to the event and invite friends	_____	_____	_____	_____
Work at the event	_____	_____	_____	_____
Writing Materials/Office Help				
Input/update donor information in the database	_____	_____	_____	_____
Draft solicitation letter and thank you letter	_____	_____	_____	_____
Address envelopes and do mailings	_____	_____	_____	_____
Process pledges	_____	_____	_____	_____
Perform general office tasks	_____	_____	_____	_____
Advocacy				
Recruit key community/institutional contacts	_____	_____	_____	_____
Meet officials to advocate for -- develop key messages	_____	_____	_____	_____
Other—Please specify your interest				
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

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