



Where the **Power of Business**
Meets the **Passion of Giving**



Best Practices Check List: Fund Development

1.	Is fund development guided by a written Fund Development Plan which is in alignment with the organization's Strategic Outcome Plan and Marketing Plan? Was the plan developed by staff and key stakeholders, such as board members, key volunteers, and partners?	Yes	No
2.	Is achievement of the Fund Development Plan reviewed quarterly by the board? Are year to year comparisons reviewed? Is donor retention and acquisition reviewed, including trends in amounts given? Are costs and effectiveness/results of ongoing fund development efforts and one-time events analyzed by staff and the board?	Yes	No
3.	Does the Fund Development Plan (or Marketing Communications Plan) segment funders into defined target markets, such as individuals, major donors, corporate gifts, private foundations, and contracting agencies? Are unique communications strategies used for each, if appropriate?	Yes	No
4.	Is the unique value of the organization and the elevator pitch written, well-known, and effective? Can the organization compete and succeed against similar organizations?	Yes	No
5.	Are fund development strategies proactive and fully accounted for in annual budgets?	Yes	No
6.	Are revenues acquired from diverse sources, such as government, individuals, corporations, foundations, events, and social enterprise? Is the organization highly dependent upon a few donors, major funders, or target market?	Yes	No
7.	Is the revenue base protected from market instabilities through a fully developed endowment or through sustainable revenue generating activities?	Yes	No
8.	Are revenue generating activities supported and evaluated by individuals highly skilled in retailing or for-profit sales and marketing? Do revenue generating activities distract from focus on creating social impact?	Yes	No
9.	Are internal fundraising skills highly developed? Does the executive director devote regular and adequate time to strategic fund development? Is external expertise accessible?	Yes	No
10.	Does the Fund Development Committee meet regularly? Is it highly effective and lead by an individual with sales and marketing expertise? Does it include top development staff? Are a large number of board members actively involved?	Yes	No
11.	Are all board members generating funds annually, either by personal donations or referrals/solicitation of other donors?	Yes	No
12.	Are board members and volunteers trained in fund development on an ongoing, regular basis? Does orientation for new board members and new volunteers include fund development techniques?	Yes	No
13.	Are board members focused on fund raising tactics which best suit their personality, contacts, and other resources?	Yes	No
14.	Is a large and active individual donor base maintained and growing?	Yes	No
15.	Is research on all available grants and potential major donors conducted regularly? Is all contact information within the donor or contact management system? Is the potential grant or donation for each estimated?	Yes	No

16. Is the donor management system secure? Are donors accurately tracked? Does the system integrate well with accounting and marketing systems? Is it easy to use and does it provide customizable reports for analysis on a regular or per appeal basis?	Yes	No
17. Are donors thanked quickly and appropriately? Are those who procure such donors thanked quickly and appropriately?	Yes	No
18. Are fundraising goals established for every event or campaign and subsequent results monitored? Are milestones included and monitored in every campaign?	Yes	No
19. Do all fund raising events align with, are related to, or promote understanding of the mission and brand? Are events evaluated based on indirect costs (staff and volunteer time, opportunities foregone due to time invested) and benefits (brand awareness) before they are enacted?	Yes	No
20. Is fund development seamlessly integrated with marketing and PR efforts?	Yes	No
Current Best Practice (Capacity) Level:	High (15 - 20) Medium (7 - 14) Low (1 - 6)	

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