

## Philanthropic Culture Checklist for Board Members

Answer each question with a “yes” or a “no” and discuss what is needed to turn a “no” into a “yes.”

Yes/No	Checklist	Action Needed
	1. I can articulate “why” I was initially recruited to serve on the board.	
	2. I know that fundraising is one of my roles, and I am willing to be an advocate/champion in the community.	
	3. I list this organization as one of my top charitable priorities.	
	4. I make a gift annually in an amount I consider “generous.”	
	5. I talk about our organization’s greatest needs for funding in priority order.	
	6. I am able to quote/cite our successes as an organization including outcome measures/metrics/impact.	
	7. I am able to “tell a story” about three different clients/situations/outcomes.	
	8. I personally know at least 8 individual donors because I solicited them or thanked them.	
	9. I regularly “open doors” and personally invite people to meet the staff or tour the program/facility.	
	10. I talk about this organization with my friends and colleagues- at work, at parties, and even in the grocery line.	
	11. I have hosted a table at the annual fundraiser and followed up with my guests to thank them.	
	12. I am considering a legacy gift to this organization in the future.	

## Philanthropic Culture Checklist for Staff Members

Answer each question with a “yes” or a “no” and discuss what is needed to turn a “no” into a “yes.”

Yes/No	Checklist	Action Needed
	1. I believe that philanthropy is essential to the fulfillment of our organization’s mission.	
	2. I can describe the programs/projects that philanthropy helps to underwrite, and I know what it does not fund.	
	3. If a donor asked me, I could give at least two or three examples of how philanthropy has an impact.	
	4. I could give several examples of where philanthropy is needed right now.	
	5. I have personally met and know at least five donors by their first names because I solicited them or thanked them.	
	6. I have written thank-you letters to donors who have supported a program/project.	
	7. We treat each and every donor as a partner, regardless of how much time, talent, or treasure he or she gives.	
	8. Every year, I make my own gift to the organization because I want to be counted as a donor, too!	
	9. When I am with friends and family, I brag about the way donors make our organization “great.”	
	10. The role of fundraising belongs to all of us and I will do whatever I can to develop strong relationships with donors.	
	11. I not only feel honored to work here but I also consider our organization as one of the leading nonprofits in our community.	