

Fundraising Internal Readiness Checklist

Item	Yes	No	Action/Comments
HUMAN RESOURCES			
Job Descriptions			
Fund Development Committee – Terms of Reference			
Accountabilities			
Role of Board			
Role of Senior and Other Staff			
Organizational Chart			
Privacy Officer			
PLANS/POLICIES			
Organizational Strategic Plan			
Annual Plan			
Fund Development Manual			
Sponsorship Plan			
Gift Processing Policies			
Gift Acceptance Policy			
Recognition Plan			
Stewardship Plan			
Privacy Policy			
Database			
Fundraising data base			
Diligence in record keeping			
Appropriate training			
FUNDRAISING PROGRAMS			
Case for Support			
Balanced Program (ie not all special events)			
Program/Sector goals			
Annual Program Evaluations			
Understand Cost/Dollar/Program			
Online Giving Tools			
COMMUNICATIONS			
Media Plan			
Branding Standards			
Website Content			
Newsletters			
Annual Report			
Ongoing / Integrated Communications			