

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 success, in outcome measures/metrics/impact.	
	7. I am able to “tell a story” about three different clients/situations/outcomes.	
	8. I personally know at least 10 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 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.	