Finding Your Inner Fundraiser: A SELF-ASSESSMENT TOOL

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One of the common reasons (or excuses?) given by board members and other volunteers as to why they can't participate in fundraising is that they don't know how. Explaining that fundraising is not so complicated, but based on basic common sense and a willingness to interact with people isn't always enough to encourage them to try it.

Here's a tool to help your potential fundraising team understand that they already have skills and experience that can be applied to fundraising. We created this assessment form to help board members, volunteers and other prospective fundraisers identify their areas of interest and talent for different types of fundraising strategies.

Generally, fundraising strategies encompass the following types of activities: asking someone directly for a gift, social gatherings, and selling something.

- Asking someone directly for a gift: Although these are the most challenging strategies to implement because they require you to feel comfortable asking for money for your cause, they also generate the most money for the time involved in carrying them out.
- Social gatherings: These are activities that bring people together at someone's home, in a larger public setting, or to carry out a pledge-raising event, better known as some kind of "-thon" (such as a walk-a-thon).

• **Selling:** With these strategies, the donor makes a purchase and receives — or has the chance to receive — something tangible for their gift. This could be a chance at a prize (as in a raffle), publicity for their business (such as in an ad book), or a clean car (in the case of a car wash).

The self-assessment tool presented here correlates certain skills and preferences to these three types of fundraising strategies. It helps identify activities many people have done that are not fundraising activities per se, but that require skills similar to those needed for fundraising.

When people using this tool tally their responses at the end, they can see the type of fundraising activity they seem most suited to based on their responses to the 10 questions. For example, are they most suited to a fundraising task that involves asking someone directly for money? Would they feel more comfortable selling something, such as a raffle ticket or an item at a garage sale? Or are their preferences and talents more along the lines of organizing an event that brings people together to celebrate and support the work of the organization?

Share this self-assessment tool with your fund-raising team — it may even generate some enthusiasm to join your fundraising efforts.

Fundraising Strategy Self-Assessment Tool

The following questions can help you identify the kinds of fundraising activities you would have the most fun with, as well as ones that require skills you already have. For each, put a check mark next to the appropriate answer, then follow the instructions for using the Tally Your Results section.

1. I've organized large (more than 30 people) birthday parties, weddings, or similar kinds of events.								
	IF YES: I	□ enjoyed	□ didn't mind	☐ didn't like the experience				
	IF NO: I □ would be willing to try it			□ would rather not try it				
	☐ Check here	if your response was one of	the italicized ones	— then go to "Tally Your Results" (below) and circle #1.				
2. I w	ork (or have v	vorked) in sales.						
	ork (or have v		□ didn't mind	☐ didn't like the experience				
	IF YES: I			☐ didn't like the experience ☐ would rather not try it				

3. I	_		• •		of cause (political, social, fundraising).
	IF YES:	l	□ enjoyed	□ didn't mind	☐ didn't like the experience
			\square would be willing to try it		
	☐ Checl	k here	if your response was one of	of the italicized on	es — then go to "Tally Your Results" and circle #3.
4. I	do or hav	e don	e public speaking.		
	IF YES:	l	□ enjoyed	□ didn't mind	☐ didn't like the experience
	IF NO:	l	□ would be willing to try it	t	□ would rather not try it
	☐ Checl	k here	if your response was one of	of the italicized on	es — then go to "Tally Your Results" and circle #4.
5. I	have or h	ave h	ad jobs (paid or volunteer)	that required clo	ose attention to detail.
	IF YES:	l	□ enjoyed	□ didn't mind	☐ didn't like the experience
	IF NO:	l	□ would be willing to try it	t	□ would rather not try it
	□ Checl	k here	if your response was one of	of the italicized on	es — then go to "Tally Your Results" and circle #5.
6. I	have or h	ave h	ad jobs (paid or volunteer)	that required org	ganizing or supervising a number of people.
	IF YES:	l	□ enjoyed	□ didn't mind	☐ didn't like the experience
	IF NO:	l	□ would be willing to try it	t	□ would rather not try it
	☐ Checl	k here	if your response was one of	of the italicized on	es — then go to "Tally Your Results" and circle #6.
7. I	have or h	ave h	ad jobs (paid or volunteer)	that required red	cruiting people to do something.
	IF YES:	l	□ enjoyed	□ didn't mind	☐ didn't like the experience
	IF NO:	l	□ would be willing to try it	t	□ would rather not try it
	Che	ck her	re if your response was one	of the italicized of	ones — then go to "Tally Your Results" and circle #7.
8. I a	am often	in sit	uations where I have to in	teract with people	e I don't know very well.
	IF YES:	l	□ enjoy	□ don't mind	☐ don't like the experience
	IF NO:	l	□ would be willing to try it	t	□ would rather not try it
	□ Checl	k here	if your response was one of	of the italicized on	es — then go to "Tally Your Results" and circle #8.
9. I	do talk o	r have	talked to my friends abou	it causes that I ca	are about and why I care about them, even when I know
m	-	-	not agree with me.		
	IF YES:	l	□ enjoyed	□ didn't mind	☐ didn't like the experience
	IF NO:	l	□ would be willing to try it	t	□ would rather not try it
	☐ Checl	k here	if your response was one of	of the italicized on	es — then go to "Tally Your Results" and circle #9.
10. I	My work (paid o	or volunteer) includes writing	g press releases, r	marketing and promotional materials, or advertising copy.
	IF YES:	l	□ enjoy	□ don't mind	☐ don't like the experience
	IF NO:	l	□ would be willing to try it	t	□ would rather not try it
	☐ Checl	k here	if your response was one of	of the italicized on	es — then go to "Tally Your Results" and circle #10.
ΤΔΙΙ	Y YOUR	RESU	IITS:		
IALL			O: Direct Asking		
		8 9	_		

The type of fundraising activity you are likely most suited for is the one that has the most numbers circled. You may well be a person who likes or is willing to try more than one of these types of strategies. Many people who are good at selling are good at direct asking; just as often, someone who likes social gatherings will be good at selling. Talk with the leader of your fundraising team about matching your skills and preferences with the group's fundraising plan.

Social Gatherings

1 4 5 6: