



This checklist is intended to help organizations determine their readiness to participate in The Richard West Freeman Endowment and Board-restricted Reserve Challenges. It is recommended that this checklist be completed by more than one person in your organization including the CEO, senior management, finance staff, development director, and/or board members. The checklist includes criterion that demonstrates readiness for engaging in a fundraising campaign for either an endowment or board-restricted reserve. The results of the checklist will not only help organizations determine if they are ready to participate in one of the Challenges, the responses will also assist organizations identify their capacity building needs and priorities for building readiness for a fundraising campaign. A completed checklist is a required attachment with the grant application for both Challenges.

Organization Name _____

Person Completing the Checklist _____

Capacities that should be in place before engaging in a reserve or endowment campaign.	Not in Place	In Place, But Not in Practice	In Place and In Practice, But Needs Work	In Place, In Practice, and Working	Notes
A clear vision for the future.					
A track record for providing quality programs and services that meet a community need.					
The organization is fiscally healthy and stable.					
Successful track record raising money from individuals.					
Board engagement in fund development.					

Capacities that will help you get ready for a reserve or endowment campaign.	Not in Place	In Progress	In Place and Needs Work	In Place, In Practice, and Working	Notes
Board members are clear on the purpose of an endowment and committed to oversee and govern the endowment/reserve.					
An endowment/reserve goal established and approved by the board.					
An endowment/reserve fundraising campaign plan.					
Staff assigned and trained to coordinate and implement an endowment/reserve campaign.					
Communications strategy and materials for the campaign.					
Systems and infrastructure for donor management and stewardship.					

Compile all of the responses to the checklist and develop your priorities for building readiness to participate in one of the Challenges. Develop an action plan with key capacity building activities, resources needed, assignments, and timelines.

Activities	Resources Needed	Who is responsible	Timeline	Notes