



# THINKING LONG-TERM...

1. Can you estimate how much funding it would take for your organization to fulfill its mission and mandate?
2. Does your organization intend to "go out of business" once its goals are met?
3. Does your Board understand its role in the governance of your organization?
4. Can you list the ten top resources your organization currently needs?
5. Can you list the five priorities your organization will need in 2010?
6. What programs or services do you provide to meet the need or solve the problem that allowed the organization to have charitable status?
7. Can you state two reasons why prospective donors should provide gifts to your organization?
8. Can you give one example of an impact that donations will have on beneficiaries of programs or services that your organization provides?
9. Do you stay in touch with people who donate to your organization?
10. Does your organization have both short-term and long-term goals?
11. Does your organization have an endowment or restricted fund for long-term stability?
12. Does your organization have a database of at least 100 past or prospective donors?
13. Do you have a brochure or booklet describing the needs of your organization for this year? Next year? 10 years from now?
14. Do you know of at least 3 people you could approach for a pledge to contribute to your operations because they believe in what your organization is doing?
15. Can you state the return on investment for any donated dollars?
16. Are there several ways that people can donate to your organization?
17. Has your organization handled a bequest?
18. If someone wanted to make a gift of shares or securities, would you refer them to an outside advisor?
19. Does your organization have an investment policy? Committee?
20. Does your organization look at alternate sources for grants from year to year?
21. Do you feel you have sufficient training to handle bequests or "planned gifts"?
22. Are you ready to learn?

#'Yes' answers\_\_\_\_\_

#'No' Answers\_\_\_\_\_