

Fundraising Go Bag Checklist

Fundraising Language / Programmatic Info:

- Case for support
- Key messages
- Project plan
- Description of services
- Prioritized wish list of organizational needs
- Testimonials / letters of support
- High resolution images
- Evaluation plans (how will you evaluate success?)

Organizational Documents / Financial Information:

- Mission statement & vision
- Organizational history / timeline
- Tax exempt document: 501(c)(3)
- Board list w/ affiliations & work contact info
- Staff list / organizational chart
- Bios for key staff members & board chair
- Anti-discrimination policy
- Document retention policy
- Whistle blower policy
- Annual budget
- Sources of funding (% public/corporate/individual & list of top 20 donors)
- Audited financial statements

Printed Items:

- Letterhead
- #10 envelopes
- #9 reply envelopes
- Pledge cards / reply device
- Thank you notes (pre-stuffed, pre-stamped & in your briefcase)