

---

# *Finding Your Inner Fundraiser:*

## A SELF-ASSESSMENT TOOL

STEPHANIE ROTH & KIM KLEIN

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 fundraising team — it may even generate some enthusiasm to join your fundraising efforts. You can download and print a version of this form that is more user-friendly at:

[www.grassrootsfundraising.org/assesstool](http://www.grassrootsfundraising.org/assesstool) 

---

STEPHANIE ROTH IS THE EDITOR OF THE *GRASSROOTS FUNDRAISING JOURNAL* AND CO-DIRECTOR OF GIFT. KIM KLEIN IS THE PUBLISHER EMERITUS OF THE *GRASSROOTS FUNDRAISING JOURNAL*.

# 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. Download and print a more user-friendly version at [www.grassrootsfundraising.org/assesstool](http://www.grassrootsfundraising.org/assesstool)

## 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 work (or have worked) in sales.

- 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” and circle #2.

## 3. I have gone door-to-door in my neighborhood for some kind of cause (political, social, fundraising).

- 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” and circle #3.

## 4. I do or have done public speaking.

- 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” and circle #4.

## 5. I have or have had jobs (paid or volunteer) that required close attention to detail.

- 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” and circle #5.

## 6. I have or have had jobs (paid or volunteer) that required organizing or supervising a number of people.

- 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” and circle #6.

## 7. I have or have had jobs (paid or volunteer) that required recruiting people to do something.

- 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” and circle #7.

## 8. I am often in situations where I have to interact with people I don't know very well.

- IF YES: I...  *enjoy*  *don't mind*  don'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” and circle #8.

## 9. I do talk or have talked to my friends about causes that I care about and why I care about them, even when I know my friends may not agree with me.

- 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” and circle #9.

## 10. My work (paid or volunteer) includes writing press releases, marketing and promotional materials, or advertising copy.

- IF YES: I...  *enjoy*  *don't mind*  don'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” and circle #10.

### TALLY YOUR RESULTS:

3 7 9 10: **Direct Asking** • 2 4 8 9: **Selling** • 1 4 5 6: **Social Gatherings**

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.