



# **Welcome to IAAIS Fundraising 101**

## **Part 2 of 3**

### **“Taking Your Fundraising Program to the Gym”**

## **IAAIS - Fundraising 101 pt 2**

### **I. Part 2 – To the gym...**

#### **A. Organizational Readiness**

- 1. Do you have a mission statement? Is it clear to an outsider?**
- 2. What is your tax status with the IRS? 501c3 or other charitable status**
- 3. In your state, do you need to register or get a license in order to solicit gifts from the public?**
- 4. Financial controls – are they in place?**
  - a) Do you have a budget (publicly available)**
  - b) Financial transparency/audits or reviews by an independent firm**
  - c) Do you have ready access to balance sheets and most recent tax return?**
  - d) List of Board members and affiliations – no conflict of interest**

## **Homework:**

- 1.) Write an action plan of at least 250 words that has at least 3 steps towards the change you seek to make and includes deadlines along with names the persons responsible for executing the 3 steps.**
- 2.) Take survey #3 before the next session.**