



Board of Trustees

Fundraising Responsibilities Policy

The California Preservation Foundation (CPF) recognizes that Board members contribute in many valuable ways — not only funds, but information, professional guidance, and in-kind resources. Therefore, each Board member is asked to review the following Board and Board member duties, and to complete the following Fundraising Commitment Form, which will facilitate CPF’s fiscal planning and eliminate repetitive requests.

Board Duties

- The Board —
 - Is responsible for attracting and supervising all the resources of the organization to carry out its programs and services.
 - Must develop a strategic plan to deliver benefits to the community it serves and to attract public support.
 - Must deliberate on and develop fundraising plans that address staff, systems, space, and budget.
 - Is part of an essential team, with the obligation to lead, support, and work together with staff and volunteers in the design, supervision, and conduct of fundraising activities.
 - Must select and evaluate the Executive Director, rating performance as a key team member of the fundraising team.
 - Must take responsibility for guidance and direction on ethical and professional practices — including use of the budget allocated for fundraising activities.
 - Must ensure that budget appropriations for fundraising are evaluated as an investment strategy designed for reliable long-term results from faithful donors, committed volunteers, and reliable sources of net revenue that meet organizational priorities.
 - Must review the results and evaluate the performance of fundraising activities at all levels to the Board’s satisfaction, in accordance with established goals and objectives.

Board Member Duties

- Each Board member —
 - Is required to be a member of CPF in good standing at the Patron level (\$500 minimum annual contribution) or the Benefactor level (\$1,000 minimum annual contribution).
 - Is expected to make such monetary contributions as the member is able in response to CPF’s fundraising appeals, whether for annual support or for specific purpose funds. Such contributions may be made by the member as an individual or by a business, government agency, or nonprofit organization with which the member is affiliated.
 - Must identify and evaluate prospective donors, cultivate and solicit gifts, actively support fundraising events by being personally present, and offer personal acknowledgments to donors and volunteers.
 - Is obliged to provide leadership and actively advocate for the organization’s priorities and its fundraising efforts.



Board of Trustees Fundraising Commitment Form*

Name: _____

My personal monetary contribution goals are one or more of the following:

1. I will be a member of CPF in good standing at the:
 - ___ Patron level (\$500 minimum annual contribution)
 - ___ Benefactor level (\$1,000 minimum annual contribution)
2. I will make such monetary contributions as I am able in response to CPF's fundraising appeals. It is my specific intention to make gifts in the following amounts to the following funds over the next twelve (12) months:
 - ___ Annual Fund: \$ _____
 - ___ Advocacy Fund: \$ _____
 - ___ Underrecognized California Fund: \$ _____
 - ___ Scholarship Fund: \$ _____
3. I will be ___ an Annual Sponsor and/or ___ an Education Sponsor.
4. I will sponsor ___ the California Preservation Conference and/or ___ the Preservation Design Awards and/or ___ Doors Open California.
5. I will contribute such other resources as may be agreed upon in advance.

As a Board member of the California Preservation Foundation:

1. I will participate in at least one the following fundraising activities:
 - ___ Leadership and major gift fundraising
 - ___ Event sponsorship solicitation and ticket sales
 - ___ Donor cultivation and recognition activities such as "thank you" calls
 - ___ Year-end fundraising
 - ___ Special and other fundraising activities (e.g., third-party hosted benefit event)
2. I will supplement these organizational fundraising activities through an individual activity or event:
 - ___ Host a company reception, a CPF program, or another event
 - ___ Other: _____

I make this commitment as a central element of my role and responsibilities as a member of the California Preservation Foundation Board of Trustees.

Signature

Date:

**To be completed after conferring with the Executive Director, Board President, or Vice-President of Development. Board members will be asked to update this form periodically to facilitate CPF's fiscal planning.*

