

FUNDRAISING PARTNER EVALUATION CHECKLIST

Use this checklist when evaluating a potential fundraising partner, their products and programs, and their services. Simply go through the checklist and make a mark next to each statement that applies to a particular company or program.

COMPANY NAME: _____

COMPANY

- 1. Professional and knowledgeable representative
- 2. Local company representative
- 3. Company representative available throughout fundraising process
- 4. Positive references and reputation
- 5. Professional sales materials
- 6. Professional company website

PRODUCT/PROGRAM

- 7. High product quality and reputation
- 8. High per-item profit
- 9. Product is in high demand with your supporters
- 10. Short turnaround times offered
- 11. Product samples available
- 12. Customized programs available (*i.e. traditional, online, hybrid*)

SERVICES

- 13. No up-front contract
- 14. No up-front fees
- 15. No up-front purchases
- 16. Delivery of product by company representative
- 17. Communication templates provided (*i.e. parent letters, emails, etc.*)
- 18. Promotional tools provided (*i.e. social media images, order forms, posters, etc.*)

WHAT'S THE VERDICT?

- 17-18 marks - Ready to sign up!
- 15-16 marks - It's a possibility.
- 14 or fewer - Keep looking.

