Local Partnership Resource Development Self-Assessment

Local Partnership: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date Completed: \_\_\_\_\_\_\_\_\_\_\_\_\_ Completed By: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| --- | --- | --- |
|  | **Yes** | **No** |
| 1. a) Does the board engage in resource development responsibilities that maximize the use of   in-kind (volunteers, goods, services, and facilities) and cash contributions to the partnership? |  |  |
| b) Does the board develop and submit an updated Resource Development Plan annually as part of the local  partnership’s Renewal Plan, which includes shared responsibility for resource development by board  members and staff? |  |  |
| c) Does the board make assurance of adequate resources to support the local partnership board’s  strategies/programs? |  |  |
| 1. a) Does the board conduct fundraising activities in an ethical and fiscally responsible manner? |  |  |
| b) Has a written process been developed to address the handling and acknowledgement of contributions and  respect for donor confidentiality requests? |  |  |
| 1. a) Does the board accurately describe the purpose for fundraising activities? |  |  |
| b) Does the board expend funds for the purpose they were solicited? |  |  |
| c) Does the board maintain accounting segregation for restricted funds? |  |  |
| d) Does the board raise funds in accordance with applicable local, state, and federal requirements? |  |  |
| 1. Does the board seek opportunities to collaborate with other partnerships and/or agencies/organizations to raise funds to meet the needs of at-risk children? |  |  |
| 1. a) Do the board and staff document in-kind contributions to the partnership in the format specified in the SC   First Steps Operations Manual, and provide timely submission of in-kind documentation to the Regional  Finance Manager? |  |  |
| b) Do all in-kind documentation and budget reallocations of in-kind funds comply with fiscal year-end  deadlines? |  |  |
| c) Does the partnership document a minimum 15% match (cash and/or in-kind) to state funds appropriated to  the partnership in the current fiscal year by SC First Steps? |  |  |
| The following question is not reflected directly in the Standards but is recommended as best practice: |  |  |
| Do all board members make a personal financial contribution each year? |  |  |