

Mini-Assessment

For Fund Development

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How much money do you need to raise?
For what purposes?
What are the best ways to raise these funds?

These are questions we all grapple with.
This mini-assessment will help provide you
with the information you need to make
wise choices.

Questions? Feel free to email me at:
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Organizational Overview:

Name of Organization:

Year Founded:

Mission	
Who do you serve:	
Current Programs	
Programs to be added in next 2-5 years	
Future initiatives planned for next 2-5 years, such as capital campaign, capacity building, equipment overhauls, etc.	

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Financial Overview: *This overview is focused on the big picture (current assets and current operating budget) and on revenue brought in via all aspects of fundraising: individual donors, corporate gifts, grants and events. It is not meant to be a complete financial picture, though as a fundraiser, you want to be familiar with your organization's financial health in all areas.*

	Unrestricted	Temp. Restricted	Permanently Restricted
Current Assets			
Gift Income *			
Grants (Private)			
Grants (Public)			
Event Income** (Net)			
Current Operating Budget			XXXXXXXXXXXX

*Charitable gifts from individuals and corporations. Does not include grants.

**Income from drawings, auctions, ads, etc. Tax-deductible portions of event revenue should be accounted for in Charitable Income (for example, ticket sales to your dinner cost \$250; \$65 is the fair market value of the dinner—the tax-deductible portion of \$185 is considered a charitable gift).

Human Resources Overview:

1. **Staff:** *The focus here is on Fundraising and Marketing staff. Also note that some staff may have multiple roles. For example, your Executive Director may spend 50% of her time on administration, which doesn't appear here, and 50% on fundraising. In this instance show her as .50 FTE Development staff. If you also have a full-time Development Director, your total development staff will be 1.5FTE.*

Development	
Marketing	
Support	
TOTAL STAFF MEMBERS	

2. **Board Members:** *If you work at an organization where there is a Governing Board and a Fundraising Board, use the latter for this exercise.*

Total number of Board Members	
Is there a "give or get?" (Yes or No)	
Number of members who make annual gifts	
Number who participate in solicitations	
Number who provide prospect introductions	
Board gifts are what % of annual fundraising goal?	
Number of Board members who won't or can't fundraise	

3. **Other Volunteers:** *Do you have a cadre of non-board volunteers who could be called on to help you fundraise?*

Number of active, non-Board volunteers	
Do you have a fundraising appeal targeted to volunteers? y/n	
Number of volunteers who are current, regular donors	
Number who have made a major gift in last 3 years	
Do you have a mechanism by which you can contact/involve these volunteers directly for fundraising purposes? y/n	

FUNDRAISING GOALS: *This is the amount(s) you must raise this coming year in order to meet the various operational needs of your organization. The goal is to support both the vision and the mission of the organization. You may have more or less categories of existing streams of revenue than are shown here. Add or delete lines as necessary. The FR Goal (E) is the result of subtracting Amount (D) of revenue from the Cost (B). Fundraising, therefore, should not be one of the existing revenue streams.*

Needs & Priorities This Year (A)	Cost (B)	Source of Existing Revenue Streams (C)*	Amt of Existing Revenue (D)	FR Goal (E)
General Operating Funds				
Program (1)				
Program (2)				
Program (3)				

* Individual donors, grants, direct mail, special events, etc.

FUNDRAISING GOAL: How much do you need to raise this year?

Unrestricted: \$ _____ Change from last year (\$)(%) _____

Restricted: \$ _____ Change from last year (\$)(%) _____

FUNDRAISING PROGRAM

Historical Snapshot—*How have you raised funds in the past?*

Fundraising Techniques	\$ Raised last year	\$ Raised previous year

Resources for Fundraising—*what tools do you have at hand?*

Available Resources	Yes/No
Donor Lists (Database)	
Prospect Lists	
Research Ability	
Collateral Materials (brochures/newsletters/website)	
Paid Fundraising Staff	
Strong Fundraising Skill of CEO	
Fundraising Volunteers	
Public Relations (Awareness)	
Fundraising Budget	

Quality and Quantity of Prospect Pool

Prospect Pool	# of Records
Names of current (gifts in last 3 years) donors	
<ul style="list-style-type: none"> • Number with good addresses • # with good phone numbers • # with email addresses 	
# of viable major donor prospects	
<ul style="list-style-type: none"> • # for whom you have real access (i.e.-board member will introduce) 	

EXTERNAL FACTORS THAT COULD AFFECT FUNDRAISING:

This could be anything from a bad economy to a similar organization in your area that is having a very visible capital campaign or a scandal that rocked your organization recently.

ANALYSIS—*What does this mini assessment tell you? This is where you have to put on your creative thinking cap. Some things are obvious: If your priority this year is to raise enough money to keep your doors open, you will not want to focus on building a planned giving program. Likewise, if you don't have a donor list, or if your database only has 50 records in it, a direct mail campaign is not the most effective way to go.*

In this space, aggregate your information into two columns: Strengths and Weaknesses as they relate to raising funds.

STRENGTHS	WEAKNESSES