

## Organizational Positioning for Fundraising Success *Self-Assessment*

PLANNING		LEADERSHIP		INVESTMENT		CASE		RELATIONSHIPS	
Milestone	Points	Milestone	Points	Milestone	Points	Milestone	Points	Milestone	Points
We have and use a Strategic Plan. (1 pt)		We have an active Development Committee. (1 pt)		We have created a detailed development budget. (1 pt)		We have created a compelling long-form case for support. (1 pt)		We have targeted appeals to segments of potential and current investors. (1 pt)	
We have and use a Fundraising Plan. (1 pt)		We have clearly defined fundraising roles for our Executive Director (1), Board Chair (1), Board (1) and Development Committee (1). (1-4 pts)		We have determined the incremental costs of carrying out our Strategic Plan. (1 pt)		We have derived from the long form case talking points / elevator pitch (1), web and social media content (1), collateral materials (1), and a grant narrative (1). (1-4 pts)		We are communicating with potential and current investors other than asking for money. (1 pt)	
We have a Logic Model for each program. (1 pt)		We have built fundraising expectations into onboarding and orientation for new Board members. (1 pt)		We have generated annual revenue goals by source (1) and are monitoring Return on Investment (1). (1-2 pts)		We have provided our "Ambassadors" our case for support. (1 pt)		We are making effective use of social media. (1 pt)	
We have researched potential investors (donors/funders) (1), segmented them (1) and devised Relationship Development Plans (1). (1-3 pts)		All Board members have signed off on annual fundraising expectations. (1 pt)		We have invested in training/mentoring for our ED (1), training for our Board (1), key development staff positions (1), a CRM (1) and collateral materials (1). (1-5 pts)		Our Ambassadors have memorized our elevator pitch. (1 pt)		We regularly thank and recognize current donors and funders. (1 pt)	
We have and use a Communication Plan/Calendar. (1 pt)		We are holding the Executive Director, Board and staff accountable for carrying out their fundraising responsibilities. (1 pt)		We have dedicated sufficient time for planning (1), training (1), developing our case (1), and codifying policies and procedures (1). (1-4 pts)				We are communicating to donors the impact of their donation. (1 pt)	
<b>Your Score (max 7):</b>		<b>Your Score (max 8):</b>		<b>Your Score (max 13):</b>		<b>Your Score (max 7):</b>		<b>Your Score (max 5):</b>	

### How did you do? Total Score (out of a maximum 40):

34-40: Well-positioned! Let's nail the last few strategies over the next 6 months.

27-33: You're in good shape but there's still work to do over the next 12 months.

20-26: You have a decent foundation. Let's plan on maximizing your score within an 18-month window.

13-19: You've got some positives. Let's plan on at least doubling your score over the next 24 months.

0-12: Don't fret! We'll take a long-view approach and you'll be in great shape in 30 months' time.

Contact us if you'd like help racking up the points to fundraising success!