

ASSESSMENT OF DEVELOPMENT PROGRAM AND BOARD FUNDRAISING

Use the scale below to assess the effectiveness of your development program as it relates to board fundraising. Check the appropriate box for each statement.

Below Standard: We don't operate in this way.
 Standard: We usually operate in this way but not always.
 Above Standard: We regularly operate in this way with very rare exceptions.

	Below	Standard	Above
Each board member, the CEO/ED, and the chief development officer give a gift every year.			
The board understands its role in fundraising.			
Each board member does some fundraising tasks each year.			
There are members on the board who effectively solicit gifts face-to-face.			
There are members on the board who effectively plan and execute fundraising and cultivation events.			
Board members attend special events and schmooze with guests.			
There are board committees or task forces that assist staff with planning and coordinating fundraising activities.			
The development director has direct access to the board to discuss fundraising issues.			
The board regularly discusses the big picture development strategies and fundraising culture of the organization.			
Board members identify potential supporters.			
The board and senior staff understand and support a culture of philanthropy.			
Fundraising ethnics and standards have been adopted by the board and are followed by the organization.			
Fundraising activities involve volunteers who are not on the board.			
Fundraising volunteers give to the organization.			
A written fund development plan is created with the participation of the CEO/ED and the board.			
Board and volunteers are empowered to play a true leadership role steering the work of the organization.			
Board cultivates relationships with donors outside of their giving.			

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	Below	Standard	Above
Contacts of board members are cultivated as prospects and connected to the organization itself before asked to give.			
Board and volunteers are regularly thanked in meaningful ways.			
The work taken on by board members is well-suited to their individual talents and skills.			
Board receives regular training on trends, new developments, and best practices in fundraising field.			
Time is taken at board meetings to connect with why we're inspired by the work of organization.			
Board members personally thank donors.			
An assessment of strengths and weaknesses of the board is done annually.			
Board members have many ways to be involved in fundraising.			
Board members receive and read regular financial reports on income and expenses.			
Board members cultivate relationships with current donors and prospects before asking them for money.			
Board members have job descriptions that detail their fundraising responsibilities.			
Board members make individual fundraising plans for themselves each year.			
Total number of responses in each category:			

Discussion Questions:

- How many responses do you have in each category? Which got the most and the least?
- What are you doing well and what can be improved?
- In the areas where you are currently “below standard,” which most urgently need to be addressed and which are secondary?
- What steps can be taken now to start improving in each of the most critical areas?