FundEd STRATEGIES

Development Self-Assessment Worksheet

Instructions: Set aside a 1-2 hour period of time to review these questions with your team. Ensure that any individuals who play a significant role in development, communication, and general leadership are invited to participate. Discuss each question thoroughly before giving yourselves a score. If you and your team feel that on a regular basis your development work fully completes/accomplishes the task, mark "Yes." If you and your team feel that you complete the task occasionally or partially, mark "NI" for Needs Improvement. If you and your team rarely or never complete the task, mark "No."

Section 1) Institutional Readiness

Case for Support Discussion Questions	Yes	NI	No
Can all fundraising-related team members clearly, consistently, and confidently articulate the mission of your school and how funding is and will be used?			
Can all board members/other staff clearly, consistently, and confidently articulate what funding is and will be used for this year?			
Does your organization have any written donor-facing collateral materials? (e.g. fundraising pamphlets, case for support documents, etc.)			
Do these materials clearly explain the mission of your school and what makes you unique?			
Do these materials clearly explain your program model and impact?			
Do these materials provide a persuasive call to action?			
Do these materials provide a vision of the future and/or clear explanation of how funding will be used?			

Marketing and Communications	Yes	NI	No
Does your organization have a clear, visually-appealing, and user-friendly web presence?			
Does your web presence contain compelling storytelling about your mission and goals?			

Does your website have a clear way to donate and/or sign up to volunteer?			
Is your branding/messaging standardized across platforms?			
Does your organization regularly communicate with your community through social media and email?			
Do these communications discuss a variety of different topics/invites/financial asks/etc.?			
Does your organization have a communications calendar or systematic way to plan out content in advance?			
Do you measure the efficacy of your communications and adapt using this data?			
Do you segment/individualize your communications? E.g. Craft certain emails for a specific subsets of supporters.			

Strategic Plan	Yes	NI	No
Does your organization have a clear and realistic strategic plan with explicit reference to how development is involved?			
Does the organization have a clear idea about what tangible steps they must take to achieve the goals laid out in their plan?			
Is the strategic plan clearly communicated to staff, donors, and community members?			

Data Management	Yes	NI	No
Does your organization have a system that allows you to track communication, interactions, and important information about donors and community partners?			
Does your organization have systems of auditing, data management, and analysis?			

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S T R A T E G I E S

Section 2) Human Resources

Staff	Yes	NI	No
Does your organization have a clear division of job responsibilities for development-related work?			
Is the Head of School/Executive Director involved in development to some extent, especially in regards to major donors and sponsors?			
Is there adequate capacity so development individuals have the time and support they need?			

Board of Directors	Yes	NI	No
Does the organization have between 8-14 board members?			
Is the board made up of individuals from diverse backgrounds? (In terms of race, ethnicity, gender, age and other identities as well as professions, skills, and talents)			
Does the board have clear instructions on how to support development?			
Does the board regularly engage with fundraising, community mapping, and connection building efforts?			

Committees/Advisory Board/PTSA	Yes	NI	No
Does the organization have any internal or external committees that support development and communications?			
Do these committees have clear roles and expectations?			
Are they regularly accomplishing the tasks they set out to do and supporting the development and communications team?			

Volunteers	Yes	NI	No
Do volunteers have a clear sense of their responsibilities?			
Do volunteers have a designated point of contact at the organization?			

Are systems for regular volunteer appreciation and acknowledgement in place?			
Do they receive regular communication from the organization with news and updates?			
Do volunteers have opportunities to become more or less involved as they desire?			
Are avenues of giving made available to them?			

Section 3) Revenue Pipeline

Individual Donors	Yes	NI	No
Does your organization have a clear understanding about the current state of their individual donors?			
Do they have an effective data system to track donors, donations, and trends?			
Do staff have a clear sense of what individual supporters care about?			
Do their donors come from a variety of different entry points/connections?			
Is their donor retention rate around or above 40% per year?			
Is there a team member who's job description includes donor cultivation and stewardship?			
Is there regular and individualized communication with individual donors?			
Is their revenue from individual donors in line with their needs and expectations?			
Are frequent efforts being made to forge new connections and appeal to new donors?			

Corporations and Businesses	Yes	NI	No
Does your organization have a clear understanding about the current state of their corporate donors?			

Do corporate donors have a variety of avenues of engagement (event/program sponsorship, volunteering, board member opportunities, etc.)?			
Is there regular communication and updates provided to corporate sponsors?			
Is there a team member who's job description includes corporate donor cultivation and stewardship?			
Is their revenue from corporate donors in line with their needs and expectations?			
Are frequent efforts being made to forge new connections and appeal to new corporate donors?			

Foundations	Yes	NI	No
Does your organization have all materials required to solicit grant funding? (E.g. Tax Exempt Status Letter, two recent 990s, Financial Statements, Detailed Organizational Budget, etc.)			
Does your organization have a clear understanding about the current state of their foundation grants?			
Do they have an effective data system to track grants, deadlines, and necessary data?			
Is there a team member who's job description includes grant writing and foundation cultivation and stewardship?			
Is there regular communication and updates provided to foundations who've awarded grants (especially smaller family foundations)?			
Is their revenue from foundation grants in line with their needs and expectations?			
Are frequent efforts being made to forge new connections and apply to new foundations?			

Government	Yes	NI	No
Does your organization have a clear understanding about the current state of their government funding?			
Do they have an effective data system to track applications, deadlines, and necessary data?			

Is there a team member who's job description includes applications, billing, and managing government funding?			
Is their revenue from government sources in line with their needs and expectations?			
Are frequent efforts being made to find and apply for new government funding opportunities?			

Section 4) Vehicles for Philanthropy

Annual Fund/General Yearly Fundraising	Yes	NI	No
Does your organization have clear plans, goals, and systems in regards to their annual fund?			
Does your organization make multiple appeals throughout the year?			
Is their annual fund in line with their needs and expectations?			

Major Gifts	Yes	NI	No
Does your organization have a clear definition for major donors and a good understanding of the current state of their major donors?			
Is there a team member (ideally the Executive Director will play a role) who's job description includes major donor cultivation and stewardship?			
Is there regular and individualized engagement with major donors?			
Are frequent efforts being made to forge new connections and appeal to new donors?			

Planned Giving	Yes	NI	No
Does your organization have a planned giving program?			
Is enrollment (and finding information) user-friendly and clear?			
Is there a designated individual on the team who can answer questions, support enrollment, and show appreciation for people who enroll?			

Events	Yes	NI	No
Does your organization conduct events which have impactful ROIs?			
Are sponsorship opportunities created and presented in clear and persuasive ways?			
Is revenue from events in line with needs and expectations of the organization?			
Is increased workload pre-event distributed in sustainable ways?			

Section 5) Relationship Building

Stewardship and Acknowledgement	Yes	NI	No
Does your organization have a clear system of how donors are acknowledged?			
Do they reliably track outreach and acknowledgements?			
Are TRL/acknowledgement emails or letters typically sent within 2 business days?			
Are acknowledgement letters informative and appreciative?			
Are acknowledgements personalized/individualized to the donors?			

Methods of Communication	Yes	NI	No
Does your organization use direct mail (if they have determined it to be effective)?			
Does your organization use phone calls to update and thank supporters and partners?			
Does your organization use in-person/zoom meetings to update and thank supporters and partners?			

Section 6) Policies and Procedures

Do you have the following procedures informally or formally documented?	Yes	NI	No

Grant Management/Tracking			
Donor Data Tracking/Analysis			
Donor Recognition, Stewardship and Privacy			
Gift Acceptance and Processing			
How to Handle Restricted Funding			

Next Steps)

List 3-5 strategies you will implement to address some of the areas of improvement that you and your team have identified	What tangible steps will you take in order to implement these strategies?	Who will be responsible for ensuring this happens?

When will you and your team check-in on the progress of these strategies and tasks?
We recommend sending a calendar invite to all team members to check-in at least quarterly and for larger tasks with multiple steps, set up monthly or biweekly meetings to plan, implement, and check-in on progress.