

# fundraising ASSESSMENT 2017

As you prepare for 2017 we offer you our Prerequisites for Fundraising Success assessment tool. We created this to help you assess the extent to which the prerequisites for fundraising success are present within your nonprofit. Whether yours is a grassroots advocacy organization, or a large college or university, the principles are the same. At its core fundraising is 90% planning and 10% solicitation.

Our assessment tool is all about assessing the extent to which your nonprofit is prepared to fundraise. Have you built a consensus amongst your leadership? Do you know what – exactly – you are raising money for, how the funds will be used and what the projected impact will be? Our fundraising assessment tool will help you thoughtfully consider the extent to which your nonprofit is ready to fundraise. We hope it will be used by individuals, boards, and executive leadership teams. We encourage you to begin the deep conversations, investigations, preparation, and allocations of time and resources that precede fundraising.

## More Than Good Intentions... About the Prerequisites

Sustained, successful fundraising requires consistent attention, action, funding, and leadership. It is proactive and volunteer-driven. The success of an organization's or institution's fundraising depends upon the involvement of board members — specifically, their ability and willingness to cultivate and solicit major donors. This is where it all begins. If the leadership of an organization is not behind a fundraising initiative, it will be very difficult for volunteers or staff to experience success.

Our assessment tool shares the 18 prerequisites for fundraising success we have identified through our extensive experience working with non-profit organizations and institutions. We have found that good intentions, desire, and commitment abound amongst board members, staff, and volunteers. While these traits are a mandatory prerequisite for fundraising success, they are not enough.

You will also need board members, volunteer leadership, and staff who have access to individuals and institutions that can provide the financial and other resources you seek to secure. You will need strong project management skills and the ability to ensure your fundraising goals remain a priority in spite of other emerging and/or unpredicted priorities. Volunteer recruitment and management will be key to your success. So will creativity, strategic thinking, and the ability to take advantage of opportunities as they arise.

Always keep in mind that successful fundraising is donor focused. While it may sound counterintuitive, fundraising is not necessarily about you and your organization or institution. Success comes when you understand why your current and potential donors want to support your organization and when you value those motivations. When donor motivations are valued, the nature of the relationship between a donor and an institution can transform from one where donors are viewed primarily as a revenue source to one where donors and institutions partner to achieve a common goal.



# Assess Your Fundraising Readiness

Take a moment to indicate your assessment of which prerequisites are currently “present,” and which are “to be developed” at your nonprofit. Don’t worry if you are “not sure” – simply indicate that as your assessment.

Present	To be Developed	No Sure	Prerequisites
			1. Attain full understanding and agreement regarding the organization’s mission, vision, goals, strategic direction, and financial position amongst the organization’s leadership.
			2. Achieve full commitment from the board of directors, CEO, executive director, or president, and top fundraising staff.
			3. Develop an active fundraising leadership team that meets regularly.
			4. Allocate funds and resources required for implementation of the fundraising plan.
			5. Create a clear, concise, and compelling case for financial support that ties back to the organization’s strategic plan.
			6. Complete a fundraising assessment and feasibility study or survey.
			7. Develop a time-phased fundraising plan.
			8. Define roles and responsibilities for staff, board members, volunteers, and consultants.
			9. Hire professional staff whose primary role is fundraising management, volunteer training and management, and administrative support.
			10. Identify top-caliber volunteer leadership.
			11. Craft fundraising guidelines, policies, and procedures.
			12. Recruit a team of properly trained and informed volunteers.
			13. Use a donor database system to facilitate fundraising management and decision making.
			14. Coordinate solicitation strategies.
			15. Create a strong awareness and education program to complement and support fundraising activities.
			16. Thank and recognize donors and volunteers.
			17. Offer meaningful donor benefit packages and naming opportunities.
			18. Encourage open lines of communication amongst all parties, combined with a sense of urgency.

***Start Small... Plan Big.***



## After Your Assessment

We hope the questions included in our assessment tool have triggered questions and ideas for you. We encourage you to continue to contemplate the prerequisites for fundraising success and to share with others involved in growing your nonprofit. If you want to take your assessment to the next level, take the time to purchase and read our book *Prerequisites for Fundraising Success*. The book has a chapter dedicated to each of the prerequisites along with checklists for you and your team to use as you build and grow your fundraising program. Implementing the prerequisites will help ensure a strong foundation for your fundraising efforts.

You will find that as you put the prerequisites in place you will be changing the culture of your organization. You will be growing your fundraising infrastructure and capacity. You will be moving toward volunteer-driven fundraising. You will be increasing the level of accountability and transparency within your organization. You will be providing volunteers with an opportunity to give of their strengths in ways that are meaningful for them. Regardless of your size, you will find that you are becoming more community-based and more inclusive.

The lessons we share are based on years of experience. They have been tried and tested and are presented to help you avoid mistakes that can be damaging in both the short term and long term. They will help you raise money and transform your organization. Truly, they are prerequisites for fundraising success, and so much more.

### Other fundraising tools from Saad&Shaw

1. *The Fundraiser's Guide to Soliciting Gifts: Turning Prospects into Donors* (<http://bit.ly/HowToSolicit>)
2. *Prerequisites for Fundraising Success: 18 Things Every Fundraising Professional, Board Member, or Volunteer Needs to Know* (<http://bit.ly/FundraisingPrereqs>)
3. *FUNdraising Good Times* – weekly blog and column ([www.FUNdraisingGoodTimes.com](http://www.FUNdraisingGoodTimes.com))



For more details read our book *Prerequisites for Fundraising Success: 18 Things Every Fundraising Professional, Board Member, or Volunteer Needs to Know* available through [Amazon.com](http://Amazon.com).

