

Within this section, we address the following areas:

- A) Comprehensive Development Program Evaluation
- B) Specific Fundraising Vehicle Evaluation
- C) Purpose of Gifts Evaluation
- D) Sources of Contributions Evaluation
- E) Fundraising Staff Performance Evaluation
- F) Internal Evaluation

A) Comprehensive Development Program Evaluation

Comprehensive Development Program Evaluation							
Indicator	Formula	Two Years Ago	Previous Year	Annual Rate of Growth (%)	Current Year	Annual Rate of Growth (%)	Cumulative Growth Rate (%)
Number of Development Areas	# of Fundraising Vehicles/Strategies						
Average Gift Size	Total Gift Income/ Total Responses						
Average Gift Size of New Donors	Total Gift Income from New Donors / Total Responses of New Donors						
Number of Upgraded Gifts	Total Number of Upgraded Gifts						
Income Received	Gross Contributions						
Total Response for Development Program	Total Number of Responses						
Percent Response	Respondents/ Solicitations						
Total Development Expense	Direct Costs + Indirect Costs						
Pure Donations (Net)	Income Received- Expenses						
Number of Donor Visits Made	# of Donor Visits						
Number of Donors							
Yearly Donor Attrition	Percentage of Donors Lost From Beginning of Year						
Number of New Volunteers	# of New Volunteers						
Number of Total Volunteers	# of Total Volunteers						

Average Cost Per Gift	Expenses/Donors						
Rate of Return/ Marginal Donative Product	Contributions/ Fundraising Expense						
Cost Per Dollar Raised	Fundraising Expenses/ Contributions						
Board Involvement							
Board Giving Percentage							
Value of In-kind Gifts							
Board Speaking Engagements							
Percentage of Employee Giving							
Donor Satisfaction							
Growth of Philanthropic Culture							

B) Specific Fundraising Vehicle Evaluation

Specific Fundraising Vehicle Evaluation						
Indicator	Formula	Major Gifts	Grants	Direct Mail	Special Events (Evaluate Each)	Annual Solicitations
Total Number of Gifts Given	Total # of Gifts Given					
Income Received	Gross Donations of Vehicle					
Net Income Received	Income - Expenses of Vehicle					
Expenses	Direct Costs + Indirect Costs					
Responses from Solicitation	$\frac{\# \text{ of Gifts Given}}{\# \text{ of Solicitations}} \times 100$					
Average Cost Per Gift	Fundraising Expense / # of Gifts					
Average Gift Size	$\frac{\text{Income Received}}{\# \text{ of Gifts}}$					
Cost Per Dollar Raised	$\frac{\text{Fundraising Expense}}{\text{Contributions}} \times 100$					
Return on Vehicle	$\frac{\text{Contributions}}{\text{Fundraising Expense}}$					
New Relationships Developed/Volunteers	Number of new relationships or new volunteers developed					
Capacity to Identify Major Gifts	# of Upgraded Gifts Occurring					
Ability to Expand Donor Base	New Donors Giving to Vehicle					
Percent of Contributions of Whole Program	$\frac{\text{Contributions of Vehicle}}{\text{Total Development Contributions}} \times 100$					
Ability to Convey Mission	Educational Value, Awareness Value, Understanding					

Source of Contributions Evaluation

Source	Number of Gifts	Income From Source	Average Gift Size	% of Total Revenue
Board of Directors				
Staff				
New Donors				
Repeat/Renewed Donors				
Corporations				
Foundations				
Individuals				
Organizations				
Other				
TOTAL:				

D) Purpose of Gifts Evaluation

Purpose of Gift Evaluation				
Source	Number of Gifts	Income	Average Gift Size	% of Total Revenue
All Fundraising Revenue				
Unrestricted				
Endowment				
Restricted				
TOTAL				

F) Internal Evaluation

Staff Development Evaluation				
		Rate 1 - 10 (10 being the highest)		
Personal Fit		Rating	Weight	Total
	Ability to lead		1	
	Ability to manage		1	
	Ability to work with volunteers		1	
	Ability to motivate behind the case		1	
	Ability to work with board		1	
	Ability to work with key donors		1	
	Confidence		1	
	Ability to discover and realize strengths of their team		1	
	Ability to plan		1	
	Ability to present a credible image		1	
	Ability to build relationships		1	
	Ability to deal with conflict		1	
	Transparency and willingness to grow		1	
	Passion for mission and core values		1	
	Morale		1	
Component Score				
		Rate 1 - 10 (10 being the highest)		
Strategic Direction		Rating	Weight	Total
	Ability to implement		1	
	Understanding of resources needed		1	
	Bigger picture of FR program		1	
	Ability to discern and learn from environment		1	
	Visioning strategy		1	
	Planning for program		1	
	Alignment of FR program and strategic direction		1	
Component Score				
		Rate 1 - 10 (10 being the highest)		
Program Results		Rating	Weight	Total
	Volunteer program objectives		1	
	FR program objectives		1	
	Integration of philanthropy into organization		1	
	Case translation and transmittance		1	
	Marketing program objectives		1	
	Integration of philanthropy with the board		1	
	Integration of philanthropy with staff		1	
	FR Program planning		1	
	Development Committee objectives		1	
	Overall effectiveness		1	
Component Score				

Internal Evaluation		
Characteristic to Evaluate	Rating (1-10 = 1 low, 10 high)	Comment
Clarity of our vision, the 1%		
Discipline to drive organizational alignment (the 99%) behind our vision		
Committed and engaged board or advisory team		
Philanthropic Sustainability and Fundraising are Tier 1 priorities		
We view the donor/volunteer as a long term relationship (20 years +)		
We understand our value proposition and case as a ministry		
We understand why our donors care		
We have a presence of constituencies who care		
We understand why our constituencies care		
We understand how to engage our constituencies		
We understand where our fundraising profile is		
We focus on face to face donor development		
We prioritize personalizing the donor relationship		
We prioritize creating meaningful donor experiences		
Our fundraising program has ability to regularly meet FR goals		
We have an effective fundraising plan that will drive long term sustainability		
We have the needed training and education to be effective in fundraising		
We have the needed systems and structure to engage our donors and volunteers		
Our efforts in Cultivation of relationships		
Our efforts in Stewardship of relationships		
Our efforts in meaningful solicitation		
TOTAL SCORE		