



## FUNDRAISING CAPACITY

### Self-Assessment Worksheet

Each section represents one of our four predictive indicators for success to guide you through a self-assessment of your readiness to raise more funds for your nonprofit. Evaluate your organization across each area and use our rubric criteria to determine where you fit on the scale from lacking to thriving. Total your score for each section and then aggregate them on the final page.

CASE FOR SUPPORT	Lacking (0 points)	Surviving (1 point)	Striving (2 points)	Thriving (3 points)	Score
<b>Clear Vision and Strategic Plan:</b> Does the organization know where it is going, can you tell your story?	No strategic plan, no clear vision	Vision and strategic plan initiated	Clear vision, developing strategic plan	Current strategic plan and clear vision	
<b>Target Goal and Fundraising Priorities:</b> Do you know how much the project and its components will cost?	No fundraising priorities or specified goals	Do not have well defined fundraising priorities (no financial goals)	Know fundraising priorities, may not know the financial goal for each priority	Defined fundraising goals and clear priorities—you know what you are raising money for and how much you need	
<b>Marketing Relationship with Development:</b> Can you get your story out and known to your market? And can you communicate and educate audiences about your story?	Lacking a communications platform and limited/no engagement	Building development communications platform and limited/no engagement program	Established development communications platform, limited implementation of cultivation events for engagement	Strong development communications platform; effectively implements cultivation calendar for engagement	
<b>Ability to Amplify the Vision:</b> Do you know your story, and can you tell it broadly with volunteers? Is it emotional, compelling, urgent? Can you demonstrate impact?	No compelling story at this time	In process of developing compelling story, need to evolve your story	Have a compelling story but need to share story more often and more effectively	Urgent and compelling case that dedicated leaders can effectively communicate	
<b>Case for Support TOTAL</b>					



PHILANTHROPIC POTENTIAL	Lacking (0 points)	Surviving (1 point)	Striving (2 points)	Thriving (3 points)	Score
<b>Major Gifts:</b> Is there an existing major gifts program?	No Major Gifts program	Major gifts program is in development	Major Gifts program is established, but not yet meeting goal	Major Gifts Program is established and meeting goal	
<b>Annual Giving:</b> Is there an existing annual giving program?	No Annual Gift program	Annual Gift program is in development	Annual Gift program is established but not yet meeting goal	Annual Giving program is established and meeting goal	
<b>Prospects &amp; Donors:</b> Do you have an established pipeline of suspects, prospects, and donors?	No pipeline	Reactive pipeline, no proactive development of pipeline	Building pipeline of suspects and prospects at all giving levels	Robust, active pipeline of suspects and prospects at all giving levels	
<b>Strategies &amp; Organization:</b> Do you emphasize strategies, cultivation schedules, engagement plans to organize your work?	No fundraising strategies, implementation, or documentation	Limited fundraising strategies and implementation and no documentation	Inconsistent fundraising strategies, implementation and/or documentation	Intentional fundraising strategies are created, documented, and implemented for the organization's top prospects and donors	
<b>Philanthropic Potential TOTAL</b>					



DEDICATED LEADERS	Lacking (0 points)	Surviving (1 point)	Striving (2 points)	Thriving (3 points)	Score
<b>Executive Leadership Team:</b> Does the Executive Leadership Team operate cohesively with the development team and with a shared vision and collective goals?	Executive Leadership believes that responsibility for fundraising lies solely with the fundraising staff	Executive Leadership does not see the need to partner with development to meet fundraising goals, but will participate when asked	Executive Leadership inconsistently partners with development in meeting fundraising goals	Executive Leadership has a shared responsibility in achieving fundraising goals	
<b>Board:</b> Does the organization have strong governance that yields a balanced and diverse skillset within the Board? Does the Board understand their role in fundraising?	The Board has little to no engagement with the organization	The Board has limited activity and engagement and lacks effectiveness	The Board has solid governance, is active and engaged but needs to diversify skillsets for optimal effectiveness	The Board has strong governance that is yielding a balanced and diverse skillset within the board	
<b>Volunteer Leaders:</b> Do you have a separate group of volunteer leaders dedicated to development work (i.e., development or advancement committee)?	The Board/ volunteer leaders believe that responsibility for fundraising lies solely with the fundraising staff	The Board/ volunteer leaders do not recognize the need to partner with development to meet fundraising goals, but will participate when asked	The Board/ volunteer leaders inconsistently partner with development in meeting fundraising goals	The Board/ volunteer leaders have a shared responsibility in achieving fundraising goals	
<b>Development Team:</b> Do you have a dedicated and effective fundraising staff?	Development does not create and execute strategies or effectively engage and steward prospects and does not achieve fundraising goals	Development creates and executes few strategies and engages and stewards few prospects, which results in achieving minimal fundraising goals	Development creates and executes some strategies and engages and stewards some prospects yet achieves fundraising goals	Development creates and executes strategies and effectively engages and stewards prospects to achieve fundraising goals	
<b>Dedicated Leaders TOTAL</b>					

STRATEGIC RESOURCE INVESTMENT	Lacking (0 points)	Surviving (1 point)	Striving (2 points)	Thriving (3 points)	Score
<b>Staff:</b> Do you have dedicated development staff appropriate and capable of meeting fundraising goals now and in the future?	Organization does not have dedicated development staff	Organization has inadequate staff to meet current fundraising goals	Organization has dedicated staff appropriate and capable of meeting current fundraising goals	Organization has dedicated staff appropriate and capable of meeting fundraising goals now and in the future	
<b>Systems:</b> Do you have a full suite of integrated functional fundraising systems (i.e., prospect management, stewardship, annual advancement planning, communications, gift receipting/tracking/acknowledging, wealth screening, database, etc.)? Can your staff efficiently implement these systems?	No fundraising systems in place and/or staff does not utilize	Have minimal or primitive fundraising systems and/or staff is limited to implement	Have most functional fundraising systems and staff to efficiently implement to achieve fundraising opportunities	Have full suite of integrated functional fundraising systems and staff efficiently implements to maximize fundraising opportunities	
<b>Appropriate Funding:</b> Is there an established budget that is managed and adequate for the fundraising program now and in the future?	No established budget for fundraising program	Have established budget that is inadequate for current fundraising program	Have established budget that is managed and adequate for current fundraising program	Have established budget that is managed and adequate for fundraising program now and in the future	
<b>Business Practices:</b> Do you have fundraising policies and procedures in place (i.e., gift acceptance policies, endowment spend, gift counting) that are practiced?	No fundraising policies and procedures in place	Fundraising policies and procedures are inconsistently practiced and need review	Have fundraising policies and procedures in place and practiced that are due for review/update	Have up-to-date fundraising policies and procedures in place that are practiced	
<b>Strategic Resource Investment TOTAL</b>					



## SUMMARY OF FUNDRAISING CAPACITY

Take your score from each of the four predictive indicator sections and record it on the chart below. Add your four scores to get a total number and use this assessment as a benchmark as you continue to build capacity. This is an ideal opportunity to discuss priorities with your development team, volunteers, and Board and identify areas of focus for the future.

Predictive Indicator	Subtotal Score (from each section above)	Notes and Key Areas of Opportunity
 <b>CASE FOR SUPPORT</b>		
 <b>PHILANTHROPIC POTENTIAL</b>		
 <b>DEDICATED LEADERS</b>		
 <b>STRATEGIC RESOURCE INVESTMENT</b>		
<b>TOTAL</b>		

HOW CAN WE HELP? If you have questions about how to build your capacity to fundraise or would like to learn more about The Compass Group's consulting services to nonprofits, you can contact us at: [info@compassgroup.com](mailto:info@compassgroup.com) or call 800.809.3170.