



RESOURCE DEVELOPMENT ASSESSMENT

Please rank with an 'X' where you believe your Club to be in each area 1 – 5

1 = Does not achieve (poor); 2 = Partially achieves (fair); 4 = Usually/mostly achieves (good); 5 = Always/fully achieves (great)

Please note: if you do not plan to conduct a capital campaign, leave that section blank and refer to the "Summary - No CC" for your score.

ASSESSMENT CATEGORIES		RANKING			
Section A: RD Planning		1	2	4	5
1	Your organization has a written strategic plan and annual goals to support it.				X
2	Your organization has a written resource development plan with defined strategic and financial goals that support the Strategic Plan.				X
3	Your organization has a written case for support that was developed by board and staff.				X
4	Your resource development plan was created through collaboration between professional staff and members of the board.				X
5	The resource development plan includes strategies for an annual campaign, major gifts, planned giving and stewardship.				X
6	Current leadership and volunteers are identified in the resource development plan and given assignments.		X		
7	Your organization has a master calendar or timeline for all fundraising strategies throughout the year.			X	
COUNT		0	1	1	5
Section B: Infrastructure/Operations		1	2	4	5
1	Your organization has designated office space and equipment to support fundraising activities.				X
2	Your organization has a donor management system to track donor solicitations, gifts, pledges, contacts, committees, birthdays etc. NAME OF SOFTWARE: <u>Donor Perfect</u>				X
3	Your donor management system is managed by a designated staff member and is used to provide the board/staff with donor history and gift analysis reports.				X
4	Your organization has access to donor prospect research tools and a process in place to identify/evaluate individuals, foundations & corps.				X
5	A board approved gift acceptance policy is in place.				X
6	Donors receive prompt gift tax receipts (in addition to other stewardship contacts).				X
7	A grant management system is in place to ensure compliance is in place, program deliverance is met, and reports are generated on time.				X
8	Your organization conducts a donor centered development cycle (e.g. donor identification, cultivation, solicitation, stewardship).				X
9	Your organization/board has an overall ability to attract gifts from individuals.				X
10	Your organization/board has an overall ability to attract corporate gifts.				X

11	Your organization/board has an overall ability to attract gifts in-kind.				X
12	Your organization/board has an overall ability to attract gifts from private foundations.				X
13	Your organization raises funds through face-to-face solicitations.				X
14	Your organization raises funds through a direct or targeted mail program.				X
15	Your organization has a major gifts campaign in the planning stages or in process.				X
16	Your organization has a planned giving program in the planning stages or in process.		X		
17	Your organization evaluates the effectiveness of special events and works to limit the number annually.			X	
18	Your organization has a written special event policy.			X	
19	Your organization regularly seeks grants and develops proposals in compliance with strategic objectives.				X
20	Your organization has collateral materials to support the fundraising process (i.e., annual campaign brochures, letters, logos, press kit, ads).				X
21	Your organization has access to training materials to assist board/volunteers participating in fundraising.			X	
22	Your organization has an annual campaign in place for individual solicitations with volunteers and board.				X
23	Your web site meets the needs of donors seeking program information, opportunities to give on line and special event information.				X
24	Your organization utilizes external resources (including those from BGCA) to assist in the fundraising process.				X
COUNT		0	1	3	20

Section C: Staffing		1	2	4	5
1	Your organization has a dedicated RD professional who is experienced at conducting a comprehensive fundraising program.				X
2	A written up-to-date job description is in place for RD staff outlining assignments and expectations.				X
3	A written annual performance plan is developed and evaluated for development staff.		X		
4	The organization is adequately staffed to implement the RD goals both short and long-term.			X	
5	The CPO works closely with development staff in supporting the RD Plan and the RD Committee.				X
6	Your RD professional has access to the board of directors and the resource development committee.			X	
7	Both the CPO and the RD staff attend regular professional training either through BGCA or other professional sources.				X
8	RD professional is active in AFP or other professional fundraising groups.				X
9	A system is in place to enlist and train volunteers.			X	
COUNT		0	1	3	5

Section D: Funding Streams/Endowment		1	2	4	5
1	Your Club has diverse revenue streams.				X
2	If the top two funding sources fell away (excluding gifts from individuals), your organization would still be able to operate.			X	
3	Your organization has a board designated reserve fund.				X
4	Your organization actively raises revenue for your endowment.	X			
5	Please list each source of funding below (enter percentage in each corresponding box):				
	a. Individual	17.0%			
	b. Corporate	4.6%			
	c. Foundations	16.0%			
	d. Special Events	22.0%			
	e. Government	30.0%			
	f. Program Fees	6.2%			
	g. United Way				
	h. Other	4.2%			
	COUNT	1	0	1	2

Section E: Capital Campaign (leave blank if N/A)		1	2	4	5
1	A capital campaign is planned and integrated with the strategic plan.				
2	A capital campaign is in process and integrated with the overall RD plan.				
3	A capital campaign has been successfully executed and has transitioned to an ongoing major & planned gift strategy.				
		0	0	0	0

Section F: Board Engagement		1	2	4	5
1	All board members can articulate your mission as well as the impact (i.e. Case for Support) the Club has on members and the community.			X	
2	Your board understands the basic programs conducted in your Club.			X	
3	Your board has visited all facilities and is familiar with the neighborhood(s) served.		X		
4	Most of your Board members visit the Club on a regular basis.		X		
5	Your board works with the professional staff and has periodic strategy meetings.			X	
6	You have written and relevant performance expectations in order to evaluate your board members regularly.				X
7	The board nominating committee periodically reviews board composition for mix of skill levels, commitment and support.				X

8	New board members have adequate orientation to the Club and their roles and responsibilities.		X		
9	The board receives ongoing training and/or information needed from BGCA or other sources to fulfill its roles and responsibilities.				X
10	Board members provide an annual commitment form.				X
11	Your board carefully reviews financial information and is diligent in fiscal matters.				X
12	Your board has a clear understanding of the resource development process in your organization.			X	
13	The board operates under a detailed, written annual Resource Development Plan that encompasses all types of fundraising activities.				X
14	The board regularly evaluates the cost effectiveness of your organization's fundraising activities.				X
15	Your board understands that fundraising is part of their governance responsibilities and actively participates in the process.				X
16	Your board annually reviews the resource needs of the organization and approves a written comprehensive funding strategy.			X	
17	Each board member makes a personal, priority gift to support the organization in addition to supporting special events.				X
18	Individual board members influence their company/profession to make financial and/or in-kind contributions.				X
19	Your board members actively steward new and existing donors.				X
20	Individual board members and volunteers conduct face-to-face solicitations.				X
21	Individual board members open public relations doors for the organization.				X
22	Individual board members have connections to the wealthiest people living in your community as well as key business and civic leaders.				X
23	Individual board members solicit major gifts from individuals, companies and foundations.				X
24	Your organization conducts effective and engaging board meetings.				X
25	Board members are given adequate recognition for their service.				X
26	Resource Development has a role in your annual board retreat.			X	
27	Your organization has a Resource Development Committee that reports to the full board.			X	
28	Your RD Committee has written job descriptions with clearly defined responsibilities.			X	
29	Your RD Committee actively engages and supports key leadership of your organization (e.g. CPO, development staff, board and volunteers).			X	
30	Your CPO works closely with development staff to brief and involve RD Committee in all aspects of fundraising at the organization.			X	
31	Members of the RD Committee and board of directors actively participate in the planning and implementation of the RD plan.				X
32	Your RD Committee reviews your organization's RD program, strategy and results (i.e. events, campaigns, grants) annually.		X		
33	Your RD Committee informs new board members of fundraising obligations.		X		
COUNT		0	5	10	18