



Development Assessment

Organization: _____

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If your organization were fully funded, what top 3 missional objectives would be accomplished?

What are the top 3 characteristics of a successful development program at your organization?

What is preventing a successful fundraising program from being fully implemented?

What are the unmet opportunities for funding your organization is currently facing?

What external (out of your control) threats are facing your organization's funding?

Anything else you would like to share:

Development Program Leadership:

What are the top 3 strengths your “Development Director” (DD) brings to the development program at your organization?

What are the top 3 weaknesses your DD is working to overcome?

How many years has your DD been involved in fundraising (at any level)? _____

With what aspects of fundraising (Major gifts, Direct Mail, etc.) does your DD have experience?

Does your DD receive any ongoing training/education/etc. currently? If so, please explain.

Describe the scope of your development program (i.e. inclusion of a planned giving department, direct mail, etc.) and staffing structure.

Anything else you would like to share:

Board of Directors:

How many members are on the Board of Directors (BOD)? _____

If you feel the BOD needs more members, please describe the type of additional members you would like (i.e. “business owner”, “pastor”, etc.)

What requirements are in place with regard to your BOD’s personal giving to your organization?

What requirements are in place with regard to your BOD’s involvement in the ongoing development efforts of your organization?

Do you have a committee of the BOD focused specifically on development (i.e. “advancement committee”, etc.)?

What actions have individual BOD members taken in the past 12 months to assist in the development program?

Ideally, what would your BOD’s engagement with your development efforts look like?

Finances:

What is your organization's revenue target this fiscal year and describe your progress to date towards reaching that number?

Have you been experiencing a trend of declining, increasing, or stagnant revenue over the past 2-3 years?

In your opinion, what factors are affecting the above trend?

Describe your different sources of revenue (i.e. major gifts, planned gifts, events, direct mail, etc.) and the percentage of revenue you get from each.

What is your revenue goal 3 years from now? \$_____

What factors make up the difference (i.e. addition of a particular program, staff person/team, etc.)?

What is necessary to position your organization to get from where you are today, to the destination you describe 3 years out?

Development Coaching Partnership:

Have you personally, or your organization, ever worked with outside consultation/coaching? If yes, what areas of organizational/personal development were addressed?

What expectations were met, unmet, or exceeded?

What did you find to be most helpful?

Looking forward – what top 3 areas/issues would you like to address through our partnership?

What most interests you in regard to working with a development coach?

What concerns, if any, do you have in working with a development coach?

What additional information would you like to share?
