



General Strategy and Philosophy Questions

1. Do you have a current Development Plan or Strategy? Y ___ or N ___
2. Do you have a current Case Statement? Y ___ or N ___
3. Do you know the terms such as missionary vs missional fundraising? Y ___ or N ___
 If Yes, please explain where your team is positioned on that continuum. _____

4. Do you use any of the following terms (or at least know their meaning in a team Development setting)?

Huddle:	Y ___ or N ___
Faithful Activities (FA):	Y ___ or N ___
Circle of Influence (COI):	Y ___ or N ___
5. My Board has discussed and approved our policy and practice as it relates to Missionary vs Missional Development Strategy Y ___ or N ___
6. Have you ever done a Capitol Campaign exceeding \$1M? Y ___ or N ___
7. Do you have a Legacy Gift plan/strategy? Y ___ or N ___
8. List out the development strategies you are actively using and if possible, the % of Total Dollar Income (TDI) they raised last fiscal year and the cost per dollar raised (CPD): Some possibilities are: Events, Staff Development, Major Gifts, Direct Mail, Monthly Giving Club/Membership/Strategy, Electronic Appeal, etc.

Example: Events	% 32	CPD \$.45
A. _____	% _____	CPD \$ _____
B. _____	% _____	CPD \$ _____
C. _____	% _____	CPD \$ _____
D. _____	% _____	CPD \$ _____
E. _____	% _____	CPD \$ _____
F. _____	% _____	CPD \$ _____
G. _____	% _____	CPD \$ _____
9. How well do you understand the concept and implications of a Donor Advised Fund (DAF)?
 A. Very well ___ B. Basics only ___ C. What is a DAF? ___
10. If applicable, many DAF gifts did you receive between July 1, 2019, and June 30, 2020, and what was the total \$'s received from those gifts? # ___ \$ ___
11. How might you use the word engagement as it relates to your development philosophy? _____

12. Are you using an acquisition strategy? Y ___ or N ___
13. Have you used or are you using the STS/BTS/Champions strategy? Y ___ or N ___
14. If Y above, are you using it currently? Y ___ or N ___

Financial and Donated Income Questions

Please do not skip this section

15. What was your Total Donated Income (TDI) and Total Expense in 17-18, 18-19, 19-20? What was your budget? (please fill in the table below)

	Actual	Budget
17-18 Income		
17-18 Expense		
17-18 Net		
18-19 Income		
18-19 Expense		
18-19 Net		
19-20 Income		
19-20 Expense		
19-20 Net		

16. What is the total # of names on your CRM who receive communication from you? _____
17. How many giving partners did you have in 18-19_____, 19-20 _____, 20-21_____
18. How many monthly, or reoccurring partners to you have? _____
19. How many total dollars do your monthly partners give each month? _____
20. How many Major Partners (over \$2500 per year) do you have? _____
21. How many \$'s do they give on average each year? _____
22. What is your current retention rate? _____ (*Mark XX if you don't know*)
23. If you are implementing a strategy to address or improve your retention rate, can you briefly describe it?

Investing in your Development process

24. As a function of FTE (Full Time Equivalent = 40 hours in a work week), what percentage of your time as XD or DD do you spend in development? _____%
25. What is the name of your CRM? _____
26. On a scale of 1 Dismal to 10 Outstanding, how well do you use your CRM? _____
27. Do you understand the concept(s) of Segmentation? Y___ N___
28. Do you use segmentation? If yes, how? _____
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29. Do you use any type of wealth screening tool or software? Y___ N___
30. Do you use any other software or platform companies for development strategies, other than your CRM? (Classy, etc.) Y___ N___
31. If yes to 29, please list them:

- A. _____
- B. _____
- C. _____
- D. _____

You Can't Do It All Alone

32. Not including your time spent (XD or DD) in development what is the sum of all the rest of time _ spent in development by other paid staff? _____ Board? _____ Volunteers? _____
33. My Staff are responsible for _____ (#) Faithful Activities each week.
34. In the past 6 months, my staff have accomplished _____% of the above number.
35. In addition to just the # of FA's (a measurement of work effort), my staff also have specific goals for type (i.e. email, phone, appt.) and pipeline stage (fine, cultivate, wine, keep, lift)? Y _____ N _____
36. What are the financial or resource development REQUIREMENTS for your Board of Directors?
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37. Are they all complying with those requirements? Y _____ N _____
38. What was the date and type of the last training (for development) you provided your staff?
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39. What was the date and type of the last training (for development) you provided for your board?
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Bonus Questions

40. Are you familiar with the concept of A/B testing as it relates to marketing and communication? Y _____ N _____

41. If yes, please briefly share the last A/B test you ran.
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42. Are you familiar with these terms:
Open Rate Y _____ N _____
Conversion Y _____ N _____

43. Who designed your giving page(s)? _____
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44. How well do they understand the science / psychology of effective giving pages?
Good _____ OK _____ Poor _____ Not at all _____

45. What software do you use to design your giving page? _____
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- and/or if different, what processor are you using for your gifts? _____
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