



Looking Back to Leap Ahead - Evaluating Your Fundraising Results

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I) WHY

How can you use evaluation process to:

- measure what you did
- help you set improve your fundraising program moving forward
- help you set better goals for the future
- help you involve others in your development strategy (and, thereby, implementation)?

II) WHO

Pros and Cons of involving:

- Staff – Fundraising and Program
- Board members
- Volunteers
- Donors
- Other?

III) WHAT

Evaluation of results and process:

- Identification
 - Who's helping you find people?
 - How many new prospects are brought in – at what level (high-middle-low)?
 - Are you reaching new markets?
 - How successful was your ability to reach people you'd targeted?
 - Are you pressing on long-term as well as medium-term and immediately-reachable prospects?
- Cultivation
 - How many mid- and major donors at the beginning of this process? How many at the end?
 - Necessity of cultivation for upgrades – what happened here and how successful was it?
- Solicitation
 - How much raised – and also looking at total giving broken down in various ways including:
 - donation size
 - frequency of gift
 - solicitation activity
 - longevity of donor base
 - percentage of increased gifts,
 - donors' organizational contact
 - how much staff time it took to get gifts
 - the Board's role in getting gifts
 - Ratio of requests to gifts; and to deferrals
 - and any other way that seems relevant, so you have an idea of what has worked for you in the past and why

- Recognition (donor stewardship)
 - Are your donors being brought closer to the agency?
 - Look at additional opportunities
- Capacity-building/Indirect goals
 - Look at your development plan's range
 - Do you have high, mid, low level donors?
 - Are you reaching all the sectors?
 - Do you have donors, and donor markets, at all phases of the development cycle?
 - Are there particular training/expertise needs to build up your solicitor base?
 - Are you ready to approach your targeted donors? Do they need to know more about you? Do you need to build up that part of the development cycle?
 - Are your Board and other volunteers participating sufficiently in fundraising? Can improving their participation increase your results?
 - Are you sufficiently staffed in the development function?
 - Are you being strategic enough in your thinking and planning?
- Activity-based implementation / logistics
 - How did your logistical decisions support your goals – timing, workload distribution, communality?
- Costs to raise a dollar
 - A check to make sure that you're not way out of line
 - Have to balance long-term and short-term goals

IV) HOW

Tools to help you analyze your fundraising performance:

- Surveys
- Spreadsheets
- Analyze trends

V) WHEN

How often should you re-evaluate your development plan?

- Every day – implementing / monitoring / evaluating
- Once a year – written goals against actuals
- Periodic reassessments (quarterly?)

VI) KEY POINTS

- Evaluate and monitor against original AND revised goals
- Involve planners and implementers
- Identify mistaken assumptions
- Meet w/ donors, participants, staff members
- Write down your findings and thoughts so that you can refer to them the next time

Take two ideas from your TBAU worksheet to prioritize implementing. Those are your immediate evaluation goals. The rest is your plan!