



BONUS RESOURCE — Money Follows Leadership

Leadership–Fundraising Alignment Assessment

A self-assessment for small nonprofit leaders

This assessment is designed for Executive Directors and development staff at small nonprofits, organizations where one or two people carry most of the fundraising responsibility. It takes about 20 minutes. There are no wrong answers. The goal is honest clarity, not a score.

HOW TO USE THIS

Answer each question as honestly as you can, not as you wish things were, but as they actually are today. If you have a development staff member, consider completing it separately and then comparing answers. The gaps between your two responses are often the most useful data.

SECTION 1 — Goal Setting

How revenue goals are created determines almost everything that follows.

<input type="checkbox"/>	Question	Notes / Observations
<input type="checkbox"/>	Revenue goals are based on actual capacity — staffing, time, and infrastructure. <i>Not just last year's number plus 10%</i>	Notes:
<input type="checkbox"/>	Development staff participated in setting this year's revenue goals. <i>Not just informed after the fact</i>	Notes:
<input type="checkbox"/>	Goals distinguish between restricted and unrestricted revenue. <i>Unrestricted is what pays the bills</i>	Notes:
<input type="checkbox"/>	When goals feel unrealistic, there is a safe way to say so. <i>Silence is a warning sign</i>	Notes:

<input type="checkbox"/>	Question	Notes / Observations
<input type="checkbox"/>	Goals are reviewed mid-year and adjusted if circumstances change. <i>Flexibility signals maturity</i>	Notes:

Reflection:

What is one goal currently on the books that was set without full input from the person responsible for achieving it?

SECTION 2 — Leadership Engagement in Fundraising

The ED’s role in fundraising determines how much is possible — not just the development staff’s effort.

<input type="checkbox"/>	Question	Notes / Observations
<input type="checkbox"/>	The ED regularly attends major donor meetings or events. <i>Not just for the ask — for the relationship</i>	Notes:
<input type="checkbox"/>	The ED can speak fluently about the organization’s fundraising strategy. <i>Without needing to defer to staff</i>	Notes:
<input type="checkbox"/>	The ED treats fundraising as a shared organizational responsibility. <i>Not a delegated task</i>	Notes:
<input type="checkbox"/>	The ED is accessible to donors in a way that feels genuine, not performative. <i>Donors can tell the difference</i>	Notes:
<input type="checkbox"/>	When a major donor calls, the ED knows who they are and what matters to them. <i>Relational capital lives here</i>	Notes:

Reflection:

On the spectrum below, circle or mark where your ED currently sits in their relationship to fundraising:

Avoidant <i>Avoids donor conversations</i>	Reluctant <i>Participation when asked</i>	Engaged <i>Initiates and supports actively</i>	Leading <i>Leads, models, and champions</i>
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SECTION 3 — Role Clarity and Infrastructure

Small nonprofits often under-resource fundraising and then wonder why results are inconsistent.

☐	Question	Notes / Observations
☐	<p>There is a written job description for the development role that reflects actual responsibilities. <i>Not hiring documents, working document</i></p>	Notes:
☐	<p>The development role does not routinely absorb marketing, events, and communications without additional support. <i>Scope creep kills capacity</i></p>	Notes:
☐	<p>There is a working CRM or donor database that is current and maintained. <i>Even a simple spreadsheet counts if it's used</i></p>	Notes:
☐	<p>Development staff have dedicated time for major donor relationship work. <i>Not just appeals and thank-you letters</i></p>	Notes:
☐	<p>There is a budget for professional development for fundraising staff. <i>Retention begins with investment</i></p>	Notes:

SECTION 4 — Culture and Sustainability

Culture is what happens when no one is watching. These questions get at whether fundraising is set up to last.

☐	Question	Notes / Observations
☐	<p>Fundraising staff can take time off without the work falling apart. <i>A sign of healthy infrastructure</i></p>	Notes:
☐	<p>When something goes wrong, the response is problem-solving, not blame. <i>Leadership tone shapes this</i></p>	Notes:
☐	<p>The organization talks honestly about revenue challenges without shame or panic. <i>Transparency builds trust internally too</i></p>	Notes:
☐	<p>Burnout or exhaustion in the development role has been named and addressed. <i>Silence normalizes unsustainable pace</i></p>	Notes:

<input type="checkbox"/>	Question	Notes / Observations
<input type="checkbox"/>	The board understands revenue concentration risk and takes it seriously. <i>Not just celebrating good numbers</i>	Notes:

WHAT TO DO WITH YOUR ANSWERS

If you checked fewer than half of the items in any section, that section is where the most important conversation needs to happen — not about effort, but about design.

Bring this assessment to your next one-on-one with your ED or development staff. Don't use it to assign blame. Use it as a shared map of where the gaps are and what would need to change to close them.

The most important thing you can do with honest data is act on it — one conversation, one adjusted expectation, one clarified role at a time.

NOTES: