

Development Audit: Initial Findings and Recommendations
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High-Level Observations and Implications
Further Details Contained in Report

Observation #1: The mission's strongest appeal is to individuals, particularly those passionate about public space, health, and XXX. Corporations are also a viable funding source, especially for naming rights and sponsorships due to the XXX high visibility and media exposure.

Implication: Redirect fundraising resources (including staff and board time) toward growing the individual donor base. Begin engaging high-capacity prospects now to lay the groundwork for face-to-face solicitations in late 2025 and early 2026.

Observation #2: The organization cannot rely solely on the board for fundraising growth. Three of 10 board members met the \$25K give/get requirement before the close of 2024, three maintain open invoices to meet the requirement, and four were not able to meet the requirement in the most recent fiscal year. Board sector diversity limits access to new funding circles. A larger network of engaged fundraisers and ambassadors is needed.

Implication: Create two volunteer committees focused on fundraising, donor cultivation, and networking. Engage well-connected supporters to introduce the organization to new high-net-worth individuals and corporate partners. Step up board expansion efforts to recruit individuals with fundraising expertise and broader philanthropic networks.

Observation #3: Foundation funding for XXX programming is not a viable short-term strategy. The nonprofit landscape is saturated with workforce development programs, and XXX is not widely viewed as a funding priority by institutional donors.

Implication: Shift primary fundraising efforts to family foundations, high-net-worth individuals, and corporate sponsorships. Foundations should be approached strategically for long-term relationship building rather than immediate funding expectations.

Observation #4: The organization is leaving significant major donor potential untapped by not offering compelling giving opportunities tied to impact. Donor offers are needed to encourage larger gifts

Implication: Develop a menu of high-impact funding opportunities ("donor offers") backed by real program costs and "units of impact."

Observation #5: Donor response rates to appeals are very low, with Giving Tuesday raising only XXX and the year-end appeal engaging just 0.08% of the email list. This may be a sign of donor disengagement, ineffective messaging, or concern over the pace of the XXX progress.

Implication: Conduct targeted donor surveys and personal outreach to identify key concerns and messaging gaps. Directly ask lapsed and low-engagement donors:

What excites you most about XXX mission?

What would make you more likely to give?

Do you feel informed about XXX progress?

SWOT

Strengths

- Groundbreaking and unique mission centered on XXX
- One of a small number of New York City's XXX programs.
- Credibility stemming from large NYS and City investments in development of XXX
- Strong XXX constituency for XXXI, needed to maintain NYS and City support for XXX
- Nimble organization with an ability to respond swiftly to new opportunities, such as designing and launching XXX program when XXX expressed interest in funding one.

Weaknesses

- Lack of philanthropic alignment with major philanthropic categories
- Per cost of participant in program is high because of high cost of XXX
- Modest number of beneficiaries in XXX programs
- Board's lack of sector diversity as most work in the XXX sectors
- Vision of XXX still years away from coming to fruition.
- The cost of XXX will be enormous

Opportunities

- 2026 launch of XXX gives urgency to fundraising solicitations.
- Workforce development is an established philanthropic interest among foundations with the caveat that these jobs are seasonal and not a career pathway.
- Close and growing partnerships with local leadership and local community organizations in XXX, an important factor for local foundations interested in community-based efforts
- Promoting wide array of XXX benefits of XXX, particularly as XXX
- Visibility for corporate sponsors as XXX will impact XXX people and provide strong opportunities for media exposure
- XXX establishing itself as the preeminent nonprofit advocate for XXX given central role in NYS \$100 M investment in XXX and NYC's \$1 Billion capital investment in XXX

Threats

- Low awareness among foundations about XXX resources in New York City.
- Donor impatience as previous public announcements of XXX did not come to fruition.
- Possibility that the public XXX in 2026. If XXX has limited public access, there could be negative media coverage or frustration from community members.
- Short timeline for doubling budget for 2026 launch of XXX
- The shortfall in XXX budget, with cost-cutting measures potentially undermining XXX
- A focus on XXX may overshadow other programmatic pillars.
- The next mayor and governor may not be as supportive.

Board

Findings:

2024 Figures

- XXX of XXX board members met the XXX give/get goal, with three members maintaining open invoices to meet their goal.
- Board contributed a total of \$XXX
- Board raised a total of about \$XXX, including XXX
- The organization made a strategic decision to not host a Gala in 2024

- One board member said the board is as excited and invested in the mission as they've ever been.

Recommendations:

1. Prioritize recruitment of new board members with connections to key sectors/constituencies (finance, for example, as suggested by board chair.) and higher capacity to give
2. Use tool for each board member to choose among a list of ways they can support fundraising in the coming year (e.g. Sell tickets to gala, host reception, thank donors, etc). This is a way to add transparency and accountability to the board's role in development and encourages board members to set goals for themselves.
3. As you build a development committee make sure other board members understand that this committee's role is to coordinate and monitor fundraising as opposed to relieving the rest of their board from their fundraising responsibilities.
4. Create a system for sharing names of corporate prospects and other types of prospects with the board to uncover contacts and relationships. For example, the deputy director could send a list of 10-20 prospects each month.
5. Make sure all board members know exactly what will happen with any contacts they share with staff. Board members should understand that they will be in complete control of what happens to these names: how and if they are solicited, to what events they'll be invited to, etc. I created a draft document that can be adapted and shared with the board.

Major Donors

Findings & background:

- XXX has about XXX major donors, if defined as gifts \$1K+ and received in 2024.

Gift Range	Gifts
\$1-100	X
101-250	X
\$251-500	X
\$501- \$1000	X
\$1,001- \$2,500	X

\$2,501 - \$5,000	X
\$5,001 - \$10,000	X
\$10,000 & above	X

To raise \$250,000 from individual donors:

Amount	Gifts	Required	Total	Total	Percentage(%)
50000	1	5	50000	50000	20
30000	1	5	30000	80000	32
25000	2	10	50000	130000	52
15000	2	10	30000	160000	64
10000	4	20	40000	200000	80
5000	4	20	20000	220000	88
2500	5	25	12500	232500	93
2000	5	25	10000	242500	97
1000	5	25	5000	247500	99
250	10	50	2500	250000	100
	39	195		250000	

1. Prioritize individual donor engagement during first half of 2025 to lay the groundwork for face-to-face asks in late 2025. Set a fundraising goal for each prospect after qualifying each. See #6.
2. Consider doing a major donor mail appeal targeted at past donors who give above a certain amount. These would be more personalized and the ask amounts would be higher. Letter would seek funding for program areas of particular interest to the donor.
3. Consider creating a leadership council of 3 or more well connected and prominent people who can open doors, make introductions, and possibly host events. This committee would not meet but members would commit to a small number of phone calls with the managing director to share advice and contacts.
4. Prioritize and hold events where new people can be introduced to the mission. Board should be actively involved in inviting friends and colleagues to these events. If most

board members are unable to host these receptions at their homes, recruit supporters with homes that would lend themselves to these events.

5. Donors need a reason to give more and to make large gifts. Create “donor offers” or “gift opportunities so that you can quantify and convey the impact of various gift sizes. For example, these opportunities should cover the total of direct and indirect costs of serving:

- One child XXX
- One adult XXX
- One public school student XXX.
- One XXX in XXX or one hour (assuming swimming is possible in late summer or early fall).
- Operating XXX in 2026 for the period when XXX(cost for one day, week, and month).

Consider creating gift opportunities that capture the costs of ongoing communications and discussions with state and city agencies, and public officials since the managing director spends a lot of her time on this vital function.

To this end, document the costs of all programs and projects. This data would be the basis for the donor offers.

- List all program categories and subcategories.
- Budget Allocation: Assign the entire budget, including overhead, to each category and subcategory.
- Address unassigned overhead by distributing it proportionally based on program costs.
- Include committed revenue to show the remaining amount needed for each program.

On a Spreadsheet:

Column 1: Program categories and subcategories.

Column 2: Total program costs (including overhead).

Column 3: Committed revenue.

Column 4: Remaining amount needed.

6. Qualify / prioritize prospects using the system below.

Prospect	Capacity (1-5)	Philanthropic (1-5)	Interest (1-5)	Total Score

1. Rate each donor in the areas of Capacity, Philanthropic Nature, and Interest on a scale of 1 (lowest) to 5 (highest).
2. Prioritize those with a total score of 12 or higher to make a gift.

5. Consider using this system (or a variation of it) for communications with top 5%-10% of donors / prospects:

Month 1: Email or written communications

Share an impact story, program update, or success related to the donor's support.

Tailor the content to donor's interests and past giving.

General impact story with program updates.

Handwritten note

Month 2: Phone Call

Options:

Say thank you and share story.

Ask what motivates their giving

Month 3: In person interaction or invitation

Options:

Coffee or lunch meeting

Invite the donor to a site visit or behind-the-scenes experience.

Exclusive gathering, small group event, or strategic planning conversation.

Month 4: No Direct Outreach (Skip Month)

Send general organization updates via newsletters or social media but no personal communications.

Then you begin cycle again.

6. Assign every donor over a certain amount (\$500?) to a relationship manager. Managing Director and Deputy Director should have a “portfolio” of donors and prospects.

Foundations and Corporate Giving Programs

Background and Findings:

- XXX submitted XXX grant applications or LOIs to foundations or corporate giving programs in 2024.

Clif family foundation

Con Edison

Lily Auchincloss Foundation

Achelis & Bodman Foundation

NBC Community impact Grant

Verizon Foundation

XXX

Intuit QuickBooks Grant Program

XXX

Bank of America Chicago Marathon

Pinkerton Foundation

JP Morgan Chase - Valentine Perry Snyder Fund

The Robert and Tina Sohn Foundation

The Dick's Sporting Good Foundation/LISC

Ford Foundation Good Neighbor Grant

Foundation Princess Charlene of Monaco

TD Charitable Foundation Capacity Building

Impact 100 Fund

Robinhood

Saucon

- I reviewed the funders of XXX organizations in New York City and other cities XXX and found little or no support among foundations. See Addendum for a list of these funders and donors.
- The competition for private funding for workforce development and youth programming in NYC is stiff since many of the 35,000 nonprofits in the city serve children and youth. Similarly, there are more than 600 workforce development nonprofits in addition to the 3,300 union and employment programs in the city, according. Many foundations that focus on workforce development have high

expectations for metrics and outcomes to be tracked.

- I could only find four national foundations with a history of funding efforts to XXX: Kresge Foundation, Knight Foundation, William Penn Foundation, and Freedom Together (formerly JPB Foundation; inactive initiative). All are funding local efforts outside of NYC.
- Free NYC XXX programs: _____

- Nonprofits and public agencies offering _____ programs: _____

- [Foundations that have fundewd XXX in NYC](#)
- [Foundations have funded XXX in NYC](#)
- [Foundations that funded XXX in NYC](#)
- [Foundations have funded XXX in NYC](#)

For further exploration

- There may be very limited interest among NYC foundations for XXX programs given the many challenges faced by low income New Yorkers (housing, healthcare, childcare, etc). XXX may be seen as a “nice to have” program but not a critical one.
- Foundation support for recreational and sports programs may give preference to those with an academic enrichment or educational program. This is the case for the Foundation for Global Sport Development and the Heisman Trophy Fund for Youth Development at the New York Community Trust.
- Nonprofits that offer services without a facility or office may find it more difficult to secure funding from foundations because they are seen as less grounded in the communities they serve. While this is a perception issue, I’ve seen this dynamic play out with other organizations.

Recommendations:

- XXX is the most promising strategy to raise substantial money from corporations.
- For corporations, focus more on those that have natural affinity for mission as opposed to those where thousands of nonprofits will be competing for limited funding (TDBank, Verizon, AmEx, etc).
- I see limited new opportunities for foundation funding XXX. For this program I recommend focusing staff time on individuals and corporations.
- Use New York Public Library to access the Candid Foundation Directory available at these locations
<https://libguides.nypl.org/az/foundation-directory-online-professional>

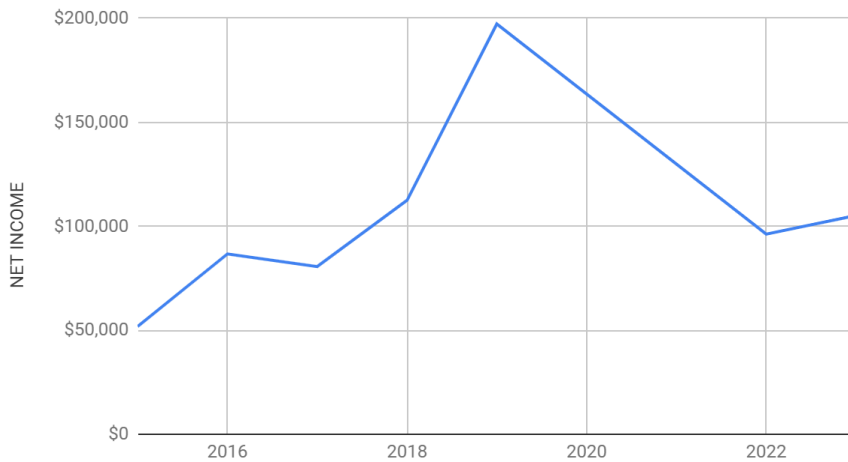
Relying on Guidestar's 990s makes prospect research very time consuming and not very effective

- Swimming program case for support: (1) Bolster need for support by adding more data on the dearth of XXX opportunities for low and moderate income children and youth in New York City; (2) Focus more on NYCHA residents as the population served as this will differentiate XXX from other organizations.
- Job-placement data is essential for sustaining funding for any workforce development program. Similarly, including job-placement data in any proposal will make it much stronger.
- Consider collaborations with national and/or local organizations to approach the Robert Wood Johnson Foundation on XXX project. RWJF is unlikely to fund a local organization unless the project has national implications.

Gala

Background and findings:

NET INCOME



- Three board members are the most active in inviting contacts to events
- Event net income has not kept up with inflation. (The 2016 income of \$86,000 would have needed to have been about \$109,000 in 2023 to match inflation, but the actual 2023 income is \$105,000.)
- Excluding 2019, there have not been large fluctuations in net income with an average fluctuation of 18%
- After-party Income has dropped significantly with \$2,650 raised in 2022 and only \$500 in 2023
- Donations have dropped from about \$25K in 2020 and 2019 to \$8,250 in 2023.
- Gala: In 2023, Board contributions accounted for 53% of total revenue (\$81,580), including \$62,830 in direct giving and \$18,750 in board “get.”
- Relying on board contributions for a significant portion of event revenue hinders the growth of the event and signals that event is not being maximized to attract new supporters. Benefits are among the most expensive ways to raise money; this expense is worth it if “the right people” are attending the benefit and if new people are being introduced to the organization.
- Gala expenses are high, particularly since they don’t account for staff time.

Gala: Expense Ratio & Cost to Raise a Dollar:

Year	Total Expenses*	Gross Income	Net Income	% of Gross Income	% of Net Income	Cost to Raise \$1*
2022	\$42,640	\$143,000	\$100,000	29.82%	42.64%	\$0.43

2023 \$50,925 \$156,320 \$105,395 32.58% 48.32% \$0.48

** Not including staff time*

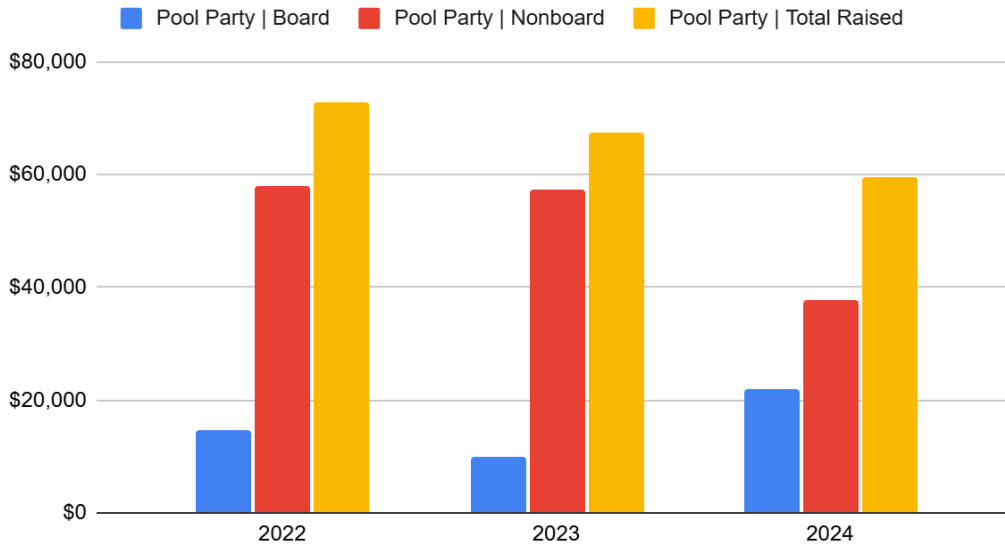
Recommendations

- The only way to significantly increase revenue is to expand the number of people who are helping with fundraising. Consider creating a Host Committee whose members would be charged with selling tickets and securing sponsorships. Committee members can introduce new contacts to the organization and attract new donors. The two board members of the development committee could be part of this along with other donors and supporters. The Host Committee would have a kick off virtual meeting to build excitement for the event but otherwise would not meet as a group. I created a draft Host Committee job description and shared it on 3/5/2025 via email.
- Consider dropping or revamping the after party. Could it be a VIP party of some sort? .
- Strengthen the ask to raise more on the evening of the event. Is there a need for more storytelling or more compelling donor offers for paddleraising?
- Have you fully analyzed what worked so well in 2019?
- Consider sending a survey to gala attendees to gauge interest in further involvement and with a menu of opportunities to get more involved. Questions could include: What areas of XXX work resonates with you most? Can we add you to our email list for periodic updates? What did you like most about the event?
- Consider using a volunteer auctioneer (after seeing them in action) from one of the large auction houses (Christie's or Sotheby's, for example) to lead the paddle raising fundraiser. I've seen some do amazing things at galas.

Small Fundraising Event

	Board	Nonboard	Total Raised
2022	\$14,750	\$58,108	\$72,858
2023	\$10,000	\$57,462	\$67,462
2024	\$21,850	\$37,791	\$59,641

Pool Party



Recommendations:

- I recommend evaluating the success of the event based on:
 - Dollars raised from non-board members.
 - New donors being introduced to the organization.
 - It's value in cultivating people who are important to the organization: Are "the right" people attending?

Donor Acknowledgment & Cultivation

Background & Findings:

				Monthly Lappers	Title Donors	\$100-\$999	\$1,000-\$2,499	\$2,500-\$4,999	\$5,000 & above	Gala	Bluefish	Five & 10 Year consecutive
<i>Bold Italics: Proposed/For Discussion</i>												
Stewardship Category	Stewardship Activity	Timing	Person/Team Responsible	Donor Type								
Gift acknowledgment	Email, automated	Following online gift	Deputy Director Update 1x year									
	Personal email	Receipt of gift	Deputy Director									
	Letter	Weekly	Deputy Director									
	<i>Phone Call</i>		Deputy Director & Managing Director		X	X	X	X			X	
	Handwritten note		Managing Director			MD	MD	MD				
	Week of Gratitude on Thanksgiving/Social Media		Deputy Director									
	<i>Call or email from Board Member</i>						X					
Donor Recognition	<i>Call or email from Board Chair</i>		Board Chair				X					
	Website Backers		Deputy Director	X								
	Backer stories			X								
	Social media		Creative Director	X								
	Gala Physical program & slideshow											
Impact Reporting	Website Dedicated Page											
	<i>Newsletter</i>		Creative Director									
	Environmental Edu Report		Program Director									
	Swim Report for crowdfunding, paddle		Program Director									

Recommendations

1. Hold at least 2 receptions throughout the year to introduce new people to the organization. These would be hosted by the board or other supporters. Gradually increase these by one per year. I think these are a must.
2. Prioritize sending thank you letters the same week the gift is received. The best practice is within 48 hours but at a minimum thank you letters should be mailed the same week. Friday could be designated as the day these letters go out.
3. Prioritize calling and calling everyone who makes a gift of \$100 or more. In most cases you'll be leaving a voicemail but people appreciate this because so few nonprofits do this.
4. Consider creating a monthly newsletter to add more structure to donor and prospect communications. Perhaps a pro bono designer can create a template for Mailchimp.
5. Create a simple and streamlined impact or annual report to showcase accomplishments and impact. It would feature lots of photos and short stories on each of the program area.

Monthly Giving

Background and findings:

As of March 2025, there are about XX recurring donors. In 2024, these donors contributed about XXX.

About 9 events for XXX draw between 5 to 30 people.

Recommendations

1. Use donation thank-you page to encourage people to sign up as a monthly donor
2. Make the "monthly" option the default choice on your donation forms to encourage recurring gifts.
3. Send one email per year thanking and listing all the recurring donors
4. Create a dedicated page for your monthly giving program that explains its benefits, shares testimonials from current donors, and provides clear instructions on how to join
5. Consider highlighting a monthly donor in your newsletter or email alert.
6. Review your donor list for anyone who has given 3 or more times during the past year. They're already in the habit of giving often and might easily upgrade to monthly if asked.
7. Send an appeal in January of every year to ask all donors under a certain amount to become a Monthly Lapper. Support appeal with social media posts
8. Do a cost/benefit analysis of the monthly donor events. Considering paring it down to 1-2 special events for these special donors. The staff time involved in organizing those events may be better spent focusing greater attention and on one-on-one relationship building with those sustaining donors who have greater giving capacity.

Grassroots Fundraising

Findings and background:

- The email distribution list is XX.
- The 2024 year end appeal raised XXX from XXX donations. Three of these donations accounted for XXX in gifts. Eight donations from 15K emails sent is a very low response rate.
- Crowdfunding campaign raises about XXX year through approximately XXX gifts. About 15 to 20 people raise money from their networks.
- The XXX raises about XXX through approximately XXX participants. Participants are invited to XXX events throughout the year and about XXX attend.
- The crowdfunding and XXX fundraisers are tremendous successes. But staff is not able to further engage the marathon donors because they're identity is not shared with XXX. It's been difficult to engage the crowdfunding donors. For example, they are invited to events but few attend. (confirm).
- In 2024, XXX gifts from new donors were received.
- About 3-4 other email appeals are sent annually
- The 2024 Giving Tuesday appeal raised XXX from XXX donors.

Recommendations

1. Consider doing a donor survey to determine what may be behind the low responses to appeals and Giving Tuesday. Are people discouraged about the delays in rollout of XXX or the false starts from recent years? Survey could also yield important insights on what is most important to people and how they would like to be kept informed.
2. Conduct two mail and email fundraising appeals each year: one in the spring and one year end. A consistent schedule is important as donors will come to expect a solicitation at both times during the year. Fold Giving Tuesday into the year-end campaign. Each campaign should consist of 3-4 emails and one letter
3. Call any donor who has given two or more times to assess interest and begin assessing capacity to give. Invite the most promising ones to coffee to get to know them better.

4. Consider making these changes to the appeal letters and emails

- Focus letter on the impact you will achieve in the coming year as opposed to what you have accomplished in the past.
- Consider highlighting the story of one child XXX to bring the XXX program to life, humanizing need and impact.
- Thank the donor when you update them throughout the year. Starting the letter with the thank you and an overemphasis on thanking the donor sends mixed signals about the purpose of the letter.
- Use more concrete language that stirs emotions: _____ and less abstract words “inequities” and “healthy relationships with XXX.”
- Focus on impact on children and youth (kids benefiting from _____ as opposed to “programs” and “initiatives.”
- Move away from asking for support for the organization. Reframe in terms of impact on kids, adults, and _____
- Consider asking for a specific amount: “We’re grateful for your previous gift of XX. This year we would be thrilled if you’d consider XXX

5. Consider making these changes to the reply form

- Use “affirmation sentence” See below for options:

YES! I want to be part of the movement to XXX. My gift of the following amount is enclosed:

YES! I want to help transform XXX Enclosed is my gift of

YES! I'm making XXX opportunities in NYC. Enclosed is my gift of:

YES! I want to help transform _____make sure all New Yorkers can discover XXX . Enclosed is my gift of:

YES! I'm XXX so more New Yorkers can experience XXX. Enclosed is my gift of:

YES! I believe everyone deserves to experience the life-changing XXX. My gift of the following amount is enclosed:

- Create two reply forms: one for donors under \$500 and one for donors above \$500. This way you can encourage donors of all levels to increase their giving by providing a reasonable ladder for upgrading their gift. If reply form can be personalized:

Ask 1: Last gift

Ask 2: Last gift x 1.25

Ask 3: Last gift x 1.5

Ask 4: Last gift x 2

- Add contact: For further information, to give a gift by phone, or to make a gift of stock, contact Raphael
- Invite people to join monthly giving program:

JOIN XXX PROGRAM

To provide dependable ongoing support for XXX, I'd like to become a Monthly XXX. Please charge my credit card the following amount

☐ every month: ☐ every quarter:

10 25 50 100 Other_____

Note: You can change your plan or opt out at any time.

Corporate Sponsorships

Recommendations:

Explore potential partnerships with corporations in these five industries: (list provided)

Target executives with these 15 titles (list provided)

Target these 25 corporations (list provided)

Asset Inventory

I. Financial

(e.g., Cash reserves and savings; real estate or property holdings; endowments or restricted funds; stocks or investment portfolios; revenue-generating programs or partnerships, etc.)

XXX

XXX

XXX

XXX

XXX

II. Intellectual

(e.g., Proprietary research or reports; specialized expertise within the organization; training programs or workshops; thought leadership through articles, speaking engagements, or panel participation, etc.)

XXX

XXX

XXX

XXX

XXX

This asset is most valuable for: Corporations and foundations

III. Reputational

(e.g., Awards and recognitions; long-standing relationships with community leaders or influencers; media coverage and PR exposure; testimonials from beneficiaries, donors, or partners, etc.)

XXX

XXX

XXX

XXX

XXX

IV. Human Capital

(e.g., Staff with fundraising or donor relations experience; board members with strong donor networks; dedicated and skilled volunteers; access to high-profile ambassadors or advocates, etc.)

XXX

XXX

XXX

XXX

XXX

V. Marketing

(e.g., Large and engaged social media following; well-maintained email marketing list; corporate cause marketing partnerships; high-traffic website with strong donation functionality, etc.)

XXX

XXX

XXX

XXX

XXX

VI. Programmatic

(e.g., Unique and engaging volunteer opportunities; individual sponsorship opportunities; signature programs with strong donor appeal; compelling success stories about beneficiaries, etc.)

XXX

XXX

XXX

XXX

XXX

VII. Programmatic

(e.g., Strong impact metrics and outcome data; comprehensive annual reports or case studies; donor reports and giving history trends; insights on donor retention, acquisition, and engagement, etc.)

XXX

XXX

XXX

XXX

XXX

XXX

XXX

XXX

XXX

XXX

VIII. Leadership

(e.g., Staff members with special expertise or knowledge; high-profile board members or volunteers with strong connections; advisory committee members with special knowledge or access to particular networks; individuals available for donor stewardship and outreach, etc.)

XXX

XXX

XXX

XXX

XXX

The Board's Role

1. Willingness and ability to fundraise is a factor in the selection of potential board members, and it is discussed with the potential member during the recruitment process.

- 1 Not at All
- 2 Somewhat
- 3 Mostly
- 4 Fully

Comments:

2. All board members make a yearly gift that is personally significant.

- 1 Not at All
- 2 Somewhat

- 3 Mostly
- 4 Fully

Comments:

- 3. Every board member meets their “give/get” fundraising goals.

- 1 Not at All
- 2 Somewhat
- 3 Mostly
- 4 Fully

d

- 4. All board members are actively involved in fundraising activities, such as making introductions to prospects, selling gala tickets, or thanking donors.

- 1 Not at All
- 2 Somewhat
- 3 Mostly
- 4 Fully

Comments:

- 5. The Board monitors the performance of our fund development program so that timely interventions/adjustments are possible.

- 1 Not at All
- 2 Somewhat
- 3 Mostly
- 4 Fully

Comments:

- 6. Board members are recognized and thanked before their peers for their fundraising contributions.

- 1 Not at All
- 2 Somewhat
- 3 Mostly

4 Fully

Comments:

7. The board chair personally solicits board members annually to ensure appropriate board giving.

1 Not at All
2 Somewhat
3 Mostly
4 Fully

Comments:

8. The Development committee organizes the board's fundraising rather than actually doing the fundraising itself.

1 Not at All
2 Somewhat
3 Mostly
4 Fully

Comments: Too soon to assess. The Fundraising Committee was formed in 2024.

9. Board members actively introduce their personal and professional networks to the organization to expand the number of prospects.

1 Not at All
2 Somewhat
3 Mostly
4 Fully

Comments:

10. Board members commit to specific fundraising activities or goals at the beginning of each fiscal year, and there is a process for reviewing the degree to which goals were met.

1 Not at All
2 Somewhat

3 Mostly

4 Fully

Comments:

Sustainer Program

1. Our program is uniquely named and branded to resonate with our mission and appeal to potential donors.

1 Not at All

2 Somewhat

3 Mostly ✓

4 Fully

Comments: XXX

1 Not at All

2 Somewhat

3 Mostly

4 Fully ✓

Comments: XXX

3. Our process for becoming a recurring donor is straightforward and accessible across various platforms.

1 Not at All

2 Somewhat

3 Mostly ✓

4 Fully

Comments:

4. We use various channels—such as email, social media, and events—to promote our monthly giving program.

1 Not at All

2 Somewhat

3 Mostly ✓

4 Fully

Comments

5. We send a thank-you letter or email in January of every year with a breakdown of gifts made and the total given for the previous calendar year.

- 1 Not at All**
- 2 Somewhat**
- 3 Mostly**
- 4 Fully ✓**

Comments: XXX

6. We build a sense of community among recurring donors to strengthen ties to XXX and foster connections between and among sustaining donors.

- 1 Not at All**
- 2 Somewhat**
- 3 Mostly**
- 4 Fully ✓**

Comments: XXX

7. We carry out a dedicated monthly giving campaign to target donors who may be more likely to give on a monthly basis, highlighting the benefits of recurring gifts for the donor and for XX.

- 1 Not at All**
- 2 Somewhat ✓**
- 3 Mostly**
- 4 Fully**

Comments: XXX

Gift Increase Appeals

8. We periodically ask sustainers to increase their monthly contributions, especially after demonstrating the impact of their support.

- 1 Not at All ✓**
- 2 Somewhat**
- 3 Mostly**
- 4 Fully**

Comments: We provide multiple ways to give including discounts for lapper at special events

9. We express gratitude regularly and communicate the impact of recurring gifts to sustaining donors through email updates.

- 1 Not at All
- 2 Somewhat ✓
- 3 Mostly
- 4 Fully

Comments: XXX

10. We assess the costs associated with acquiring and retaining monthly donors to ensure the program is financially sustainable.

- 1 Not at All
- 2 Somewhat ✓
- 3 Mostly
- 4 Fully

Comments:

Gala

Rank the purpose of the gala by numbering the goals below in order of importance (**1 = Most Important**, **2 = Second Most Important**, and so on). If a goal is **not applicable**, write **N/A**.

- **Builds Awareness:** _____
- **Raise Money:** _____
- **Generates New Supporters:** _____
- **Recruit Business Sponsors:** _____
- **Bring in New Demographic or Constituency:** _____
- **Cultivate Major Donor Prospects:** _____
- **Steward and Renew Current Supporters:** _____

1. All stakeholders understand the primary goal of the event, and we set specific, measurable goals related to attendance, tickets sold, and funds raised. The goal informs planning and execution of the event.

- 1 Not at All**
- 2 Somewhat**
- 3 Mostly**
- 4 Fully ✓**

Comments:

2. The gala is successful in building relationships with high capacity donors and draws potential major donors

- 1 Not at All**
- 2 Somewhat ✓**
- 3 Mostly**
- 4 Fully**

Comments: Do VIPs attend? XXX

3. Our board members play an active role in inviting professional and personal contacts to the event.

- 1 Not at All**
- 2 Somewhat ✓**
- 3 Mostly**
- 4 Fully**

Comments: XXX.

4. We personally follow up with top prospects about their specific interests.

- 1 Not at All**
- 2 Somewhat**
- 3 Mostly ✓**
- 4 Fully**

Comments: XXX

5. We have a plan to convert event supporters into engaged annual fund donors.

- 1 Not at All **
- 2 Somewhat ✓**
- 3 Mostly**
- 4 Fully**

Comments: XXX.

6. Our board members are active ambassadors at the event and are assigned particular guests to engage and get to know better.

- 1 Not at All**
- 2 Somewhat ✓**
- 3 Mostly**
- 4 Fully**

Comments: XXX

7. Event donors are informed throughout the year about the impact of their gift in advancing XXXs mission.

- 1 Not at All**
- 2 Somewhat ✓**
- 3 Mostly**
- 4 Fully**

Comments: XXX

8. Expenses are kept at 20–30% of the total amount raised (net).

- 1 Not at All ✓**
- 2 Somewhat**
- 3 Mostly**
- 4 Fully**

Comments: XXX

9. We thank attendees and donors as soon as possible after the event, including calls and handwritten notes.

- 1 Not at All**
- 2 Somewhat**
- 3 Mostly**
- 4 Fully ✓**

10. The event fosters a powerful connection to the mission and the needs addressed by XXX through testimonials, videos, photos, demonstrations, exhibits, or other meaningful experiences.

- 1 Not at All
- 2 Somewhat
- 3 Mostly ✓
- 4 Fully

Comments: