Looking Back to Leap Ahead - Evaluating Your Fundraising Results
RaiSing Change
July 25-26, 2008

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:
    o donation size
    o frequency of gift
    o solicitation activity
    o longevity of donor base
    o percentage of increased gifts,
    o donors’ organizational contact
    o how much staff time it took to get gifts
    o the Board’s role in getting gifts
    o Ratio of requests to gifts; and to deferrals
    o 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!*