

Development Materials & Fundraising Assessment – Helpful Information

If the item requested does not exist, please do not create it, simply share that it is not available. Please note we suggest three years of data, but if your organization is younger and does not have 3 years of data, simply use what you have available.

Fundraising By the Numbers:

Total revenue and expenses by fundraising initiative

Number of individual gifts major gifts or more (this is however you define a major gift at your organization)

Total number of gifts and individual donors per year

Donor Retention Rate

Percent Upgrades

Grant Funding Overview

Grant activity including:

- Number of grants submitted and awarded
- Total grant revenue and expenses
- Grantor names and funding amounts
- Summary details for each grant (purpose, restrictions, reporting requirements)
- Indicate which grants you have relationship with a decision maker

Appeals & Donor Response

“Green mail” totals – “Green mail” is money that arrives via the mail/online portal that is a FIRST time gift that you cannot directly attribute to any current solicitation or relationship.

Direct mail appeal details for each mailing including:

- Number of pieces mailed
- Response rates and number of gifts
- Total expenses and total revenue
- Cost per dollar raised (CDR), if available