

**ORGANIZATIONAL ASSESSMENT©**

**RESOURCE DEVELOPMENT QUESTIONNAIRE**

*To be completed separately by each of the following:*

- Executive
- Development or Fiscal Officer
- Board Treasurer or Fundraising Committee Chair

1. Does the organization have a fund development plan in place?

Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, who created the plan (board, executive, staff, consultant, other)? \_\_\_\_\_  
\_\_\_\_\_

Who is responsible for its implementation? \_\_\_\_\_

Has it been updated within the past year?

Yes \_\_\_\_\_ No \_\_\_\_\_

2. Does the organization have a diversified funding base so it is not overly dependent on one source or type of income?

Yes \_\_\_\_\_ No \_\_\_\_\_

Please list what percentage of the organization's income in the current fiscal year is derived from each of the following:

Individuals (special events, direct mail, membership, major donors, etc.)	_____ %
Foundations	_____ %
Government grants, contracts or fees	_____ %
Corporations or small businesses	_____ %
Fees for service	_____ %
Related earned income	_____ %
Unrelated earned income	_____ %

3. Does the organization have a contingency plan so that, if a particular source of funds is withdrawn or severely cut back, this would not imperil the organization's existence?

Yes \_\_\_\_\_ No \_\_\_\_\_

**RESOURCE DEVELOPMENT QUESTIONNAIRE (continued)**

Please explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4. Is fundraising for the organization a joint effort of board and staff?

Yes \_\_\_\_\_ No \_\_\_\_\_

How many paid staff work on fundraising full time? \_\_\_\_\_ Part time? \_\_\_\_\_

Does the board have an active fundraising committee?

Yes \_\_\_\_\_ No \_\_\_\_\_

5. Have staff and/or board members participated in training during the past year to increase their skills in fundraising?

Yes \_\_\_\_\_ No \_\_\_\_\_

6. Does the organization have sufficient income to meet expenses?

Yes \_\_\_\_\_ No \_\_\_\_\_

If the organization has experienced a deficit in any of the past five years, please describe. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

7. Does the organization have a balance between unrestricted and restricted income?

Yes \_\_\_\_\_ No \_\_\_\_\_

Please indicate the organization's projected income for the current fiscal year and the past three years:

	<u>Restricted Income</u>	<u>Unrestricted Income</u>	<u>Total Income</u>	<u>Expense</u>
Current Year:	_____	_____	_____	_____
Last Year:	_____	_____	_____	_____
2 Years Ago:	_____	_____	_____	_____
3 Years Ago:	_____	_____	_____	_____

**RESOURCE DEVELOPMENT QUESTIONNAIRE (continued)**

8. Has the organization been able to maintain its staff and programs?

Yes \_\_\_\_\_

No \_\_\_\_\_

If it has been necessary to decrease staff and/or programs any time during the past five years due to lack of funding, please describe. \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

9. Does the organization take advantage of any of the following types of resources:

In-kind donations                      Yes \_\_\_\_\_                      No \_\_\_\_\_

Interns                                      Yes \_\_\_\_\_                      No \_\_\_\_\_

Volunteers                                Yes \_\_\_\_\_                      No \_\_\_\_\_

Pro-bono services                        Yes \_\_\_\_\_                      No \_\_\_\_\_

Facilities or other resources shared with other organizations

Yes \_\_\_\_\_                      No \_\_\_\_\_

Group purchasing                        Yes \_\_\_\_\_                      No \_\_\_\_\_

Barter                                        Yes \_\_\_\_\_                      No \_\_\_\_\_

For each "yes," please describe. \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

10. Do board members play an active role in fundraising and in otherwise bringing material resources to the organization?

Yes \_\_\_\_\_

No \_\_\_\_\_

Please explain: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

*(A "no" answer to any of the above questions indicates the item should be given attention.)*