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 Does the organization have a contingency plan so that, if a particular source of funds is withdrawn or severely cut back, this would not imperil the organization’s existence?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

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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:

<table>
<thead>
<tr>
<th></th>
<th>Restricted Income</th>
<th>Unrestricted Income</th>
<th>Total Income</th>
<th>Expense</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Year:</td>
<td>___________</td>
<td>___________</td>
<td>___________</td>
<td>_______</td>
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<tr>
<td>Last Year:</td>
<td>___________</td>
<td>___________</td>
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<tr>
<td>2 Years Ago:</td>
<td>___________</td>
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<td>3 Years Ago:</td>
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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.)