



The Leaky Bucket Assessment of Fundraising Productivity

Find the "Leaks" in Your Fund Development Effort

The following questions will help you to assess the current level of productivity in your nonprofit's fundraising efforts. Answer all the questions in this assessment and return it to us by fax or email. You will receive a report showing your Leaky Bucket Score and improvement suggestions within 24 hours. Your confidentiality will be respected.

Fax: 1-603-963-5665 Electronic mail: info@bristolstrategygroup.com

Contact Information:

Your Name (required) _____

Your Email Address (required) _____

Your Nonprofit Organization _____

About You and Your Nonprofit Organization:

What is your role or title in your nonprofit?

- Executive Director/CEO
- Senior Development Officer or Other Senior Management Title
- Member of Development or Fundraising Team
- Grants Manager
- Board Chair or Board Member
- Other (please specify) _____

Your Nonprofit Sector: -- Select One --

- | | |
|---|--|
| <input type="checkbox"/> Arts | <input type="checkbox"/> Health Care and Health Research |
| <input type="checkbox"/> Community Development | <input type="checkbox"/> Government Sector |
| <input type="checkbox"/> Children's Services | <input type="checkbox"/> Social Services |
| <input type="checkbox"/> Economic Development | <input type="checkbox"/> Trade or Civic Associations |
| <input type="checkbox"/> Education | |
| <input type="checkbox"/> Other (please specify) _____ | |

How many people participate in your fundraising or development organization? -- Select One --

- | | |
|--|-------------------------------------|
| <input type="checkbox"/> No dedicated staff | <input type="checkbox"/> 6 - 10 |
| <input type="checkbox"/> 1 or 2, plus some board members | <input type="checkbox"/> Don't know |
| <input type="checkbox"/> 3 - 5, plus board | |

Select Your Nonprofit's Annual Revenue: -- Select One --

- | | |
|---|--|
| <input type="checkbox"/> Less than \$1MM | <input type="checkbox"/> \$10MM - \$20MM |
| <input type="checkbox"/> \$1MM - \$4.9 MM | <input type="checkbox"/> Greater than \$20MM |
| <input type="checkbox"/> \$5MM - \$9.9MM | <input type="checkbox"/> Don't know / Prefer not to answer |

Please answer the assessment questions starting on the next page.

Five Questions to Assess Your Nonprofit's Current Fundraising Practices

1. Choose the statement that *best* describes your nonprofit's standard practices for acquiring new funding sources, including grants, philanthropic donors, corporate sponsors, etc.:

- a) Our nonprofit has no standard practices or targets for acquiring new donors.
- b) Our nonprofit encourages acquiring new donors and grants but does not assign specific targets for doing so.
- c) Our nonprofit sets specific performance targets for acquiring new donors.
- d) Our nonprofit sets specific performance targets that include total number of dollars raised from new donors, as well as numbers of new donors in each category (grants, individual donations, major gifts, etc.).

Comments: _____

2. Choose the statement that *best* describes your nonprofit's standard practices for retaining current donors:

- a) Our nonprofit has no standard practices or targets for retaining donors or renewing grants.
- b) Our nonprofit encourages donor/grantor retention but does not assign specific targets for doing so.
- c) Our nonprofit sets specific performance targets for retaining donors and grantors.
- d) Our nonprofit has standard, documented practices for retaining current donors that include total dollars raised from current donors, and number of donors retained from the prior year.

Comments: _____

3. Choose the statement that *best* describes your nonprofit's standard practices for qualifying donor prospects.

- a) Our nonprofit does not have a target donor or grantor prospect profiles.
- b) Our nonprofit has target donor/grantor prospect profiles but they are not documented.
- c) Our nonprofit has a documented donor/grantor prospect profile that includes prospect factual, demographic, wealth or grantor-guideline information only.
- d) Our nonprofit has documented donor and grantor prospect profiles including factual criteria as well as information about donor motivation or preferences for charitable giving.

Comments: _____

4. Choose the statement that *best* describes your nonprofit's standard practices regarding support for fundraising staff.

- a) Our nonprofit has no staff members dedicated to fundraising; all fundraising is done on a part-time basis by executives or board members. They do all the work of prospect identification, database research, proposal preparation and so forth.
- b) Our nonprofit has a small fundraising staff (one or two people). They handle most or all of their own support activities, including donor and grantor research and identification, lead generation, database research/cleanup, preparation of proposals and applications, negotiations, and collections. We also rely on a lot of help from our board.
- c) Our nonprofit provides support staff to help the fundraising handle donor/grantor management and collections, but fundraisers must conduct their own prospect research, lead generation campaigns, database management and proposal preparation. Board members are expected to participate in lead generation and making referrals.
- d) Our nonprofit provides the fundraising team with comprehensive internal and external support for database research, lead generation, and preparing proposals or applications. Board members are trained to participate as peer solicitors and provided with appropriate scripts, collateral materials and the like.

Comments: _____

5. Choose the statement that *best* describes your nonprofit's standard practices regarding downtime (vacation, weekends, accrued time-off, family leave, etc.)

- o Our nonprofit expects the fundraising staff to work as many hours as possible, including nights and weekends, to reach fundraising financial goals, even if they have other duties.
- o Our nonprofit encourages the fundraising staff to work "smart, not hard," but it's up to the individual to manage their downtime.
- o Our nonprofit encourages the fundraising staff to take time accrued but has no documented practices regarding downtime, e.g., no rollover of annual vacation time.
- o Our nonprofit has documented practices requiring the staff, including the Executive Director, to take appropriate amounts of downtime and vacations.

Comments: _____

Three Questions on How Your Nonprofit Measures Fundraising Performance

6. Check the following basic metrics that your nonprofit uses to measure fundraising performance today:

- Performance against a single income target that includes all sources of income.
- Separate income targets for each source of income (grants, philanthropy, corporate sponsorship, earned income, etc.).
- Number of donor visits
- Number of proposals or applications produced
- Size of donor database
- None of the above

Comments: _____

7. Check the following more advanced metrics that your nonprofit uses to measure fundraising performance.

- Number of times current donors produce referrals to new donor prospects
- Number of donor prospects that match the Ideal Donor Profile
- Number of donors in the Individual Donation program
- Number of donors in the Annual Giving campaign
- Number of donors in the Planned Giving campaign
- Growth in average size of donation
- Number of multi-year grants
- None of the above

Comments: _____

How Your Nonprofit Reacts to Poor Fundraising Performance

8. Check the following techniques that your nonprofit uses to manage non-productive members of the fundraising staff

- Fire them (-1)
- Give them more qualified leads
- Give them more training in our agency's mission and programs
- Train staff to "make the ask"
- Improve leadership skills for senior management and fund-development management
- Improve board fundraising skills
- Provide better technology to support fundraising activities
- None of the above

Please share any additional comments about your organization's fundraising practices:
