evelyn & walter
HAAS JR. fund

CompassPoint
NONPROFIT SERVICES

Research to Explore the Development Director Role in Nonprofits:
Survey for Executive Director Respondents

Instructions for taking the survey:

This survey is for BOTH:

• **Executive directors/CEOs of organizations that have a senior level position with the primary role of fund development on staff.** Please note, do not take this survey if you are not currently an ED/CEO.

• **Senior level (highest ranking position) fund development staff.** Please note, do not take this survey if you are not the highest ranking fund development person in your nonprofit.

Please be candid in your responses; this survey is confidential and anonymous. Responses will be reported in the aggregate. Thank you for your contribution to this research.

*** Important Notes on Terminology***

Executive Director/CEO: The titles executive director and CEO are both used throughout the nonprofit sector. For the purposes of this survey, we use executive director or ED to mean both.

Fund Development Staff: In the nonprofit sector, there are various titles used for the highest ranking fund development staff position. For the purposes of this survey we use the terms development position and development role to mean the staff person in the highest ranking development position within the organization. This survey is not for development staff in entry level positions such as coordinator and assistants

Fund Development is the process of cultivating relationships with people who will support a nonprofit organization. Cultivation is defined as any activity that builds awareness and connection for donors/funders and prospective donors/funders with your organization, and increases your understanding of why someone might give to your organization. Fund development includes fundraising which is the specific methods used to secure charitable donations (e.g. annual fund, face-to-face asks, online, proposals, etc.).

1) What is your position in the nonprofit organization where you are currently employed?*

( ) I am the executive director or CEO

> <mark>DESIGN NOTE: If this response is selected, respondent is directed to the Executive Director Respondents survey (see the questions below).</mark>

( ) I am the senior level/highest ranking fund development staff person

> <mark>DESIGN NOTE: If this response is selected, respondent is directed to the Fund Development Respondents survey.</mark>

( ) Neither of the above

> <mark>DESIGN NOTE: If this response is selected, respondent is directed to the following message:</mark>

> **This survey is meant for:**

> 1. Executive directors/CEOs who have a senior-level fund development staff person

> AND

> 2. Senior-level fund development staff

> You replied that you are currently not in either of these roles. If you entered this in error, please return to the survey and continue. If your current position does not fit the survey criteria, please forward to the staff members in your organizations who do.

> *Thank you for your interest in this research.*

2) What is your title?*

_____

Executive Director Respondents

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1) How many years has your senior level fund development staff person been in her/his current position?

( ) Years: *(Round to the nearest year. Enter whole numbers only. Please do not include any letters, symbols, or punctuation.)* _____*

> <mark>DESIGN NOTE: If this response is selected, respondent continues with <u>question 2</u>.</mark>

( ) I don't know.

( ) The position is currently vacant and has been vacant for: *(Enter total number of months; whole numbers only. For example, 1.5 years would be entered as 18.)* _____ *

( ) We do not have a senior level development staff *position* at my organization.

This survey is meant for:

1. Executive directors/CEOs who have a senior-level fund development staff person

AND

2. Senior-level fund development staff

You replied that you are currently not in either of these roles. If you entered this in error, please return to the survey and continue. If your current position does not fit the survey criteria, please forward to the staff members in your organizations who do.

Thank you for your interest in this research.

Please tell us about your organization's senior level development position.

IMPORTANT NOTE: Answer in reference to the current *senior level/highest ranking staff person* in your organization. Please do not take this survey if you do not have a senior level development *position* in your organization (vacant or filled).

2) Which of the following describes how the <u>prior</u> fund development staff person left her/his position?

( ) Voluntarily

( ) Forced resignation/fired

( ) I don't know

( ) N/A, there was no predecessor in this position

2a) If the prior development staff person was fired, what was the primary reason for the termination?

( ) Poor performance specifically in the area of fund development.

( ) Poor performance generally (may include but not limited to performance in fund development)

( ) Not a good fit with our organizational culture. Organizational culture is defined as the group's collective behavior, values, beliefs, norms, working language, systems.

( ) Interpersonal conflict (with anyone on the staff or board).

( ) Unethical behavior.

( ) Other: _____*

3) If you were involved in the hiring process for your current senior level fund development staff person's position, to what extent do you agree with the following statements?

	Strongly disagree	Disagree	Agree	Strongly agree	N/A, I was not involved in hiring
We had a sufficient number of qualified applicants for the position.	( )	( )	( )	( )	( )
The salary that we were offering seemed to attract our desired caliber of applicants.	( )	( )	( )	( )	( )
We had a sufficient number of candidates with the right mix of	( )	( )	( )	( )	( )

skills and experience for us to interview.				

4) In the hiring process (phone and in person) for your current senior level fund development position, who was personally involved in the screening and selection?

Select all that apply.

[ ] Executive director (me)

[ ] The board chair

[ ] Other board members

[ ] Other senior level staff

[ ] Other staff within various levels and positions in the organization

[ ] Volunteers (non-board)

[ ] Clients/Constituents

[ ] I don't know

5) In your experience as an executive director, relevant to other senior level management positions how difficult was it to recruit and hire your current fund development staff person?

( ) Not as difficult as other positions.

( ) About the same level of difficulty.

( ) More difficult than other positions.

( ) I don't know; I wasn't involved in the process.

6) If your current senior level fund development staff person moved into this role from a prior position in your organization (whether lateral or a promotion), what part of the organization was s/he in?

Select the option that best fits.

( ) Fund development/fundraising

( ) Program

( ) Communications and/or marketing

( ) Finance

( ) Advocacy

( ) Administration/HR/IT

( ) Other: _____ *

( ) N/A S/he was not in a different position prior to her/his current position in the organization.

7) How many total years has your fund development staff person been employed in your organization (including all positions s/he has held)?

( ) I don't know.

( ) Years: *(Round to the nearest year. Enter whole numbers only.)* _____ *

8) Who does your current senior level fund development staff person directly report to?

( ) Me, the executive director.

( ) Another staff person who is in a development position.

( ) Another staff person not in development but in administration/finance/HR.

( ) The board of directors.

( ) Other: _____ *

9) Is this fund development staff person a member of the senior (or executive) level management team?

( ) Yes

( ) No

( ) We do not have a management team.

10) How many <u>paid staff positions</u> does this fund development staff person directly supervise?

Enter total FTE paid staff (e.g. one full time and one half time FTE = 1.5). Please do not include any letters or symbols.

_____

11) Which of the following fund development areas* are your <u>senior fund development staff person's primary responsibility</u>?

Select all that apply.

*Fundraising competencies as defined by CFRE.

[ ] **Current and prospective donor research** (develop a prospect list, prospect analysis, utilize data management system, prioritize and plan solicitations)

[ ] **Securing the gift** (development of the case, creation of solicitation program(s), asking for and securing gifts, development of solicitation materials, evaluation of solicitation program)

[ ] **Relationship building** (donor cultivation, acknowledgement and recognition, communications and information to donors)

[ ] **Volunteer involvement** (recruitment, oversight, support, evaluation, and engagement of volunteers; engagement and support of board members)

[ ] **Management** (involvement in setting organizational strategy and budgets, implementation of fund development plans, recruit, train support, and supervise (when appropriate) staff, and implementation of development policies)

[ ] **Accountability** (reporting, ensuring and monitoring donor intent, compliance)

[ ] N/A s/he does not have <u>primary</u> responsibility for any of the fund development components listed above.

12) How would you assess <u>the level of competence</u> (capability, skill, and knowledge) of your <u>current senior fund development staff person</u> within each of the following same areas?

	None at all	Novice	Knowledgeable	Expert	N/A not part of her/his job
Current and prospective donor research	( )	( )	( )	( )	( )
Securing the gift	( )	( )	( )	( )	( )
Relationship building	( )	( )	( )	( )	( )
Volunteer involvement	( )	( )	( )	( )	( )
Management	( )	( )	( )	( )	( )
Accountability	( )	( )	( )	( )	( )

13) For those areas that are part of the fund development staff person's responsibilities, how satisfied are you with her/his performance in each area?

	Very dissatisfied	Dissatisfied	Satisfied	Very satisfied	N/A not part of her/his job
Current and prospective donor research	( )	( )	( )	( )	( )
Securing the gift	( )	( )	( )	( )	( )
Relationship	( )	( )	( )	( )	( )

building					
Volunteer involvement	( )	( )	( )	( )	( )
Management	( )	( )	( )	( )	( )
Accountability	( )	( )	( )	( )	( )

14) To what extent do you agree with the following statements?

	Strongly disagree	Disagree	Agree	Strongly agree
My current development staff person is a good match for the organization's development needs in terms of her/his abilities and experience.	( )	( )	( )	( )
There is an adequate fund development infrastructure (facilities, technology, systems, etc.) in place for development staff to be successful.	( )	( )	( )	( )
My current development staff person is a good fit for the organization in terms of organizational culture (individuals' collective behavior, values, beliefs, norms, working language, systems).	( )	( )	( )	( )

15) To what extent does your senior level fund development staff person have influence over the following in her/his fund development role?

	No influence at all	Some influence	A lot of influence	I don't know
Setting organizational strategies for your organization.	( )	( )	( )	( )

Creating fund development plans for your organization.	( )	( )	( )	( )
Setting financial goals for your organization.	( )	( )	( )	( )
Developing the organization's annual budget.	( )	( )	( )	( )
The executive director's participation in fundraising.	( )	( )	( )	( )
Individual board member's participation in fundraising.	( )	( )	( )	( )
Other staff members' participation in fundraising.	( )	( )	( )	( )
Establishing the fund development department (systems, staffing etc.) in your organization.	( )	( )	( )	( )
Establishing fund development expectations of the board (as a whole).	( )	( )	( )	( )

16) Which of the following statements best describes how you feel about your <u>relationship</u> with your senior level fund development staff person?

Select one.

( ) Difficult; strained working relationship (may include: low trust, conflict, tension, poor communication, unsupportive)

( ) Functional; fair working relationship (may include: adequate trust, good communication)

( ) Exceptional; excellent working relationship (may include: deep trust, excellent communication)

17) Which of the following statements best describes how you and your senior fund development staff person partner in fund development work within the organization?

Select one.

( ) There is no partnership; we do not partner at all.

( ) It is a weak partnership; we do not partner effectively.

( ) It is a fair partnership; we partner effectively.

( ) It is a strong partnership; we partner very effectively.

18) Do you think your development staff person does a sufficient amount of solicitation/asking individual donors for contributions?

( ) Yes

( ) No

( ) N/A, soliciting/asking for gifts is not part of the development staff person's job responsibilities.

19) To what extent are you satisfied with the overall performance of your senior level fund development staff person?

Select one.

( ) Very satisfied

( ) Satisfied

( ) Neither satisfied or dissatisfied

( ) Dissatisfied

( ) Very dissatisfied

20) Has your fund development staff person given you her/his notice that s/he is leaving her/his current position?

( ) Yes, s/he has given notice.

( ) No s/he has not given notice.

( ) No, but I am actively considering terminating her/him.

DESIGN NOTE: Questions 20a and 20b are hidden unless respondent selects 'Yes, s/he has given notice' from the question above.

20a) If s/he has given notice, which of the following reasons did s/he say was a significant factor in her/his decision to leave?

Rank the top 3 choices given.

_____To find another position that will provide her/him with opportunities for professional growth.

_____To find a position that is a better match for her/him in terms of fund development skills and knowledge.

_____To work in another organization that is a better match for her/him in terms of its organizational culture.

_____To work in another organization that is a better match for her/him in terms of mission and field of work.

_____Inadequate fund development infrastructure (facilities, technology, staffing, systems, etc.) to be successful in her/his position.

_____The organization has disrespect/does not value her/his development expertise and experience.

_____Frustration that s/he is not included in organization-wide strategy, goal setting, and decision making.

_____To get out of development; desire for a different kind of work/field.

_____Lack of agreement between her/him and me, the executive director, about her/his performance expectations.

_____Lack of agreement between her/him and the board of directors about her/his performance expectations.

_____Desire for more flexibility and control over her/his schedule.

_____Interpersonal conflict with me, the executive director.

_____Interpersonal conflict with other(s) on staff.

_____Interpersonal conflict with members of the board of directors.

_____Overall burnout (e.g. feeling depleted, frustrated, frequent and prolonged exhaustion).

_____S/he is retiring.

_____Compensation/to make more money elsewhere.

_____I don't know.

20b) If there is another significant factor in her/his decision to leave, please enter it here:

_____

DESIGN NOTE: Questions 20c and 20d are hidden unless respondent selects 'No, but I am actively considering terminating her/him' from question 20.

20c) If you are actively considering terminating your current senior level fund development person, what is the primary reason?

( ) N/A I am not actively considering terminating her/him.

( ) Poor performance specifically in the area of fund development.

( ) Poor performance generally (may include but not limited to performance in fund development)

( ) Not a good fit with our organizational culture (collective behavior, values, beliefs, norms, working language, systems)

( ) Interpersonal conflict (with anyone on the staff or board).

( ) Unethical behavior.

( ) Other: _____ *

20d) If you are actively considering terminating your current senior level fund development person, is the board of directors (certain individuals or the whole board) instrumental in your decision to terminate?

( ) Not at all instrumental in my decision.

( ) A little instrumental in my decision.

( ) Moderately instrumental in my decision.

( ) Very instrumental in my decision.

DESIGN NOTE: Respondents who reported that their senior fund development position is currently <u>vacant</u>, skip the above questions and continue the survey from here:

Please tell us about <u>the last person</u> in your organization's senior level fund development position.

IMPORTANT NOTE: Answer in reference to the last person in your organization's *senior level/highest ranking fund development role*.

21) If you were involved in the hiring process for your <u>prior</u> senior level fund development staff person's position, to what extent do you agree with the following statements?

	Strongly disagree	Disagree	Agree	Strongly agree	N/A, I was not involved in hiring
We had a sufficient number of qualified	( )	( )	( )	( )	( )

applicants for the position.					
The salary that we were offering seemed to attract our desired caliber of applicants.	( )	( )	( )	( )	( )
We had a sufficient number of candidates with the right mix of skills and experience for us to interview.	( )	( )	( )	( )	( )

22) In the hiring process (phone and in person) for your <u>prior</u> senior level fund development position, who was personally involved in the screening and selection?

Select all that apply.

[ ] Executive director (me or my predecessor)

[ ] The board chair

[ ] Other board members

[ ] Other senior level staff

[ ] Other staff within various levels and positions in the organization

[ ] Volunteers (non-board)

[ ] Clients/Constituents

[ ] I don't know

23) In your experience as an executive director, relevant to other senior level management positions how difficult was it to recruit and hire your prior fund development staff person?

( ) Not as difficult as other positions.

( ) About the same level of difficulty.

( ) More difficult than other positions.

( ) I don't know; I wasn't involved in the process.

24) If your prior senior level fund development staff person moved into this role from a prior position in your organization (whether lateral or a promotion), what part of the organization was s/he in?

Select the option that best fits.

( ) Fund development/fundraising

( ) Program

( ) Communications and/or marketing

( ) Finance

( ) Advocacy

( ) Administration/HR/IT

( ) Other: _____*

( ) N/A S/he was not in a different position prior to her/his current position in the organization.

25) How many total years had your prior fund development staff person been employed in your organization (including all positions s/he had held) before her/his departure?

( ) I don't know.

( ) Years: *(Round to the nearest year. Enter whole numbers only.)*_____*

26) Who did your prior fund development staff person directly report to?

( ) Me, the executive director.

( ) Another staff person who is in a development position.

( ) Another staff person not in development but in administration/finance/HR.

( ) The board of directors.

( ) Other: _____*

27) Was the prior fund development staff person a member of the senior (or executive) level management team?

( ) Yes

( ) No

( ) We do not have a management team.

28) How many <u>paid staff positions</u> did the prior fund development staff person directly supervise?

Enter total FTE paid staff (e.g. one full time and one half time FTE = 1.5). Please do not include any letters or symbols.

_____

29) Which of the following fund development areas* were your <u>prior senior fund development staff person's primary responsibility</u>?

Select all that apply.

*Fundraising competencies as defined by CFRE.

[ ] **Current and prospective donor research** (develop a prospect list, prospect analysis, utilize data management system, prioritize and plan solicitations)

[ ] **Securing the gift** (development of the case, creation of solicitation program(s), asking for and securing gifts, development of solicitation materials, evaluation of solicitation program)

[ ] **Relationship building** (donor cultivation, acknowledgement and recognition, communications and information to donors)

[ ] **Volunteer involvement** (recruitment, oversight, support, evaluation, and engagement of volunteers; engagement and support of board members)

[ ] **Management** (involvement in setting organizational strategy and budgets, implementation of fund development plans, recruit, train support, and supervise (when appropriate) staff, and implementation of development policies)

[ ] **Accountability** (reporting, ensuring and monitoring donor intent, compliance)

[ ] N/A s/he does not have <u>primary</u> responsibility for any of the fund development components listed above.

30) How would you assess <u>the level of competence</u> (capability, skill, and knowledge) of your <u>prior senior fund development staff person</u> within each of the following same areas?

	None at all	Novice	Knowledgeable	Expert	N/A was not part of her/his job
Current and prospective donor research	( )	( )	( )	( )	( )
Securing the gift	( )	( )	( )	( )	( )
Relationship building	( )	( )	( )	( )	( )

	Very dissatisfied	Dissatisfied	Satisfied	Very satisfied	N/A was not part of her/his job
Volunteer involvement	( )	( )	( )	( )	( )
Management	( )	( )	( )	( )	( )
Accountability	( )	( )	( )	( )	( )

31) For those areas that were part of the prior fund development staff person's responsibilities, how <u>satisfied were you with her/his performance in each area</u>?

	Very dissatisfied	Dissatisfied	Satisfied	Very satisfied	N/A was not part of her/his job
Current and prospective donor research	( )	( )	( )	( )	( )
Securing the gift	( )	( )	( )	( )	( )
Relationship building	( )	( )	( )	( )	( )
Volunteer involvement	( )	( )	( )	( )	( )
Management	( )	( )	( )	( )	( )
Accountability	( )	( )	( )	( )	( )

32) To what extent do you agree with the following statements?

	Strongly disagree	Disagree	Agree	Strongly agree
My prior development staff person was a good match for the organization's development needs in terms of her/his abilities and experience.	( )	( )	( )	( )
My prior development staff person was a good fit for the organization in terms of organizational culture (individuals' collective behavior, values, beliefs, norms, working language, systems).	( )	( )	( )	( )
There is an adequate fund development infrastructure	( )	( )	( )	( )

(facilities, technology, systems, etc.) in place for development staff to be successful in the organization.				

33) To what extent did your prior senior level fund development staff person have influence over the following in her/his fund development role?

	No influence at all	Some influence	A lot of influence	I don't know
Setting organizational strategies for your organization.	( )	( )	( )	( )
Creating fund development plans for your organization.	( )	( )	( )	( )
Setting financial goals for your organization.	( )	( )	( )	( )
Developing the organization's annual budget.	( )	( )	( )	( )
The executive director's participation in fundraising.	( )	( )	( )	( )
Individual board member's participation in fundraising.	( )	( )	( )	( )
Other staff members' participation in fundraising.	( )	( )	( )	( )
Establishing the fund development department (systems, staffing etc.) in your organization.	( )	( )	( )	( )
Establishing fund development expectations of the board (as a whole).	( )	( )	( )	( )

34) Which of the following statements best describes how you felt about your <u>relationship</u> with your prior senior level fund development staff person?

Select one.

( ) Difficult; strained working relationship (may include: low trust, conflict, tension, poor communication, unsupportive)

( ) Functional; fair working relationship (may include: adequate trust, good communication)

( ) Exceptional; excellent working relationship (may include: deep trust, excellent communication)

35) Which of the following statements best describes how you and your prior senior fund development staff person partnered in fund development work within the organization?

Select one.

( ) There was no partnership; we did not partner at all.

( ) It was a weak partnership; we did not partner effectively.

( ) It was a fair partnership; we partnered effectively.

( ) It was a strong partnership; we partnered very effectively.

36) Do you think your prior development staff person did a sufficient amount of solicitation/asking individual donors for contributions?

( ) Yes

( ) No

( ) N/A, soliciting/asking for gifts was not part of the prior development staff person's job responsibilities.

37) To what extent were you satisfied with the overall performance of your prior senior level fund development staff person?

Select one.

( ) Very satisfied

( ) Satisfied

( ) Neither satisfied or dissatisfied

( ) Dissatisfied

( ) Very dissatisfied

38) Which of the following describes how your prior fund development staff person left her/his position?

( ) Voluntarily

( ) Forced resignation/fired

( ) I don't know

<mark>DESIGN NOTE: <u>Questions 38a</u> and <u>38b</u> are hidden unless respondent selects '<u>Forced resignation/fired</u>' from the question above.</mark>

38a) If the prior development staff person was fired, what was the <u>primary</u> reason for the termination?

( ) Poor performance specifically in the area of fund development.

( ) Poor performance generally (may include but not limited to performance in fund development)

( ) Not a good fit with our organizational culture. Organizational culture is defined as the group's collective behavior, values, beliefs, norms, working language, systems.

( ) Interpersonal conflict (with anyone on the staff or board).

( ) Unethical behavior.

( ) Other: _____ *

( ) I don't know.

38b) If the prior development staff person was fired, was the board of directors (certain individuals or the whole board) instrumental in the decision to terminate?

( ) Not at all instrumental in my decision.

( ) A little instrumental in my decision.

( ) Moderately instrumental in my decision.

( ) Very instrumental in my decision.

( ) I don't know.

<mark>DESIGN NOTE: <u>Questions 38c</u> and <u>38d</u> are hidden unless respondent selects '<u>Voluntarily</u>' from question 38.</mark>

38c) If s/he gave notice, which of the following reasons did s/he say was a significant factor in her/his decision to leave?

_____To find another position that would provide her/him with opportunities for professional growth.

_____To find a position that was a better match for her/him in terms of fund development skills and knowledge.

_____To work in another organization that was a better match for her/him in terms of its organizational culture.

_____To work in another organization that was a better match for her/him in terms of mission and field of work.

_____Inadequate fund development infrastructure (facilities, technology, staffing, systems, etc.) to be successful in her/his position.

_____The organization had disrespect/did not value her/his development expertise and experience.

_____Frustration that s/he was not included in organization-wide strategy, goal setting, and decision making.

_____To get out of development; desire for a different kind of work/field.

_____Lack of agreement between her/him and me, the executive director, about her/his performance expectations.

_____Lack of agreement between her/him and the board of directors about her/his performance expectations.

_____Desire for more flexibility and control over her/his schedule.

_____Interpersonal conflict with me, the executive director.

_____Interpersonal conflict with other(s) on staff.

_____Interpersonal conflict with members of the board of directors.

_____Overall burnout (e.g. feeling depleted, frustrated, frequent and prolonged exhaustion).

_____S/he was retiring.

_____Compensation/to make more money elsewhere.

_____I don't know.

38d) If there was another significant factor in her/his decision to leave, please enter it here:

_____

Please tell us about your nonprofit organization.

39) Does anyone on your board of directors solicit/ask individual donors for contributions?

( ) Yes

( ) No

DESIGN NOTE: Question 39a is hidden unless respondent selects 'Yes' from the question above.

39a) If yes, to what extent do you think there is a sufficient amount of solicitation/asking individual donors for contributions among members of the board?

( ) Very insufficient

( ) Insufficient

( ) Sufficient

( ) Very sufficient

40) Is there currently a fund development or fundraising committee of the board of directors?

( ) Yes, a committee is in place.

( ) No, we do not have a committee.

( ) We are in the process of establishing a committee.

41) What fundraising methods does your organization use?

Select all that apply.

[ ] Direct response (mail)

[ ] Online

[ ] Special events

[ ] Telephone

[ ] Major gifts

[ ] Foundation proposals

[ ] Contributions from federated campaigns

[ ] Contributions from congregations

[ ] Board giving

[ ] Planned/legacy giving (bequests)

[ ] N/A we do not solicit contributions

42) In your last fiscal year, what approximate percentage of your organization's total annual operating revenue came from the following sources?

Enter whole numbers only. Please do not include any letters, symbols, or punctuation. Sum should equal 100. Approximate percentages to the best of your ability. If you do not know, please skip this question.

_____Earned income (fees, sales, service/program contracts, investment interest etc.)

_____Membership specific earned income

_____Corporate donations or sponsorships

_____Government contracts

_____Foundation grants

_____Contributions from individuals

_____In-kind donations

43) In your last fiscal year, what was the <u>approximate total dollar amount</u> raised in contributions from individuals?

( ) $: *(Enter whole numbers only. Please so not include any letters, symbols, or punctuation.)* _____*

( ) I don't know.

( ) N/A We do not receive contributions from individuals.

44) In your last fiscal year, what was the <u>approximate total number of individuals</u> who contributed?

( ) Total number of individuals: *(Enter whole numbers only. Please do not include any letters, symbols, or punctuation.)* _____*

( ) I don't know.

( ) N/A We do not receive contributions from individuals.

45) What is your current <u>donor retention rate</u> (defined as the percentage of donors who repeated their contributions to your organization from one year to the next)?

( ) I don't know.

( ) % _____*

46) To what extent are your organization's fundraising activities (all combined)) effective at meeting your fundraising goals?

Select one.

( ) Not at all effective

( ) A little effective

( ) Somewhat effective

( ) Very effective

47) Do you agree with the following statements?

	Yes	No

My organization has realistic revenue goals for this fiscal year.	( )	( )
My organization has a fund development plan in place.	( )	( )
My organization uses a donor database in a software program specifically designed for fundraising (e.g. not Microsoft Excel).	( )	( )

48) To what extent do you agree with the following statements about your organization generally/as a whole?

	Strongly disagree	Disagree	Agree	Strongly agree
We have a culture of philanthropy in my organization. *Most people in the organization (across positions) act as ambassadors and engage in relationship building; everyone promotes philanthropy and can articulate a case for giving; fund development is viewed and valued as a mission aligned program of the organization; organizational systems are established to support donors; the executive director is committed and personally involved in fundraising.*	( )	( )	( )	( )
My organization practices good donor stewardship. *Prompt and personalized acknowledgment of gifts, ongoing communication with donors, information about results of gifts given, adherence to ethical standards and practices.*	( )	( )	( )	( )
My organization understands that fund development has a documented body of knowledge, code of ethics, certification, research, and continuing education.	( )	( )	( )	( )
My organization values our fund development staff person for her/his skills, knowledge and	( )	( )	( )	( )

expertise.				
My organization has sufficient capacity to carry out its fund development work.	( )	( )	( )	( )

49) Complete this sentence using a few words or a short sentence:

I think we would raise more money if: _____

50) What is the primary purpose of the nonprofit organization at which you are employed?

Select the option that is closest.

( ) Arts, Culture, and Humanities

( ) Educational Institutions

( ) Environmental Quality Protection, Beautification

( ) Animal related

( ) Health—General & Rehabilitative

( ) Mental Health, Crisis Intervention

( ) Disease, Disorders, Medical Disciplines

( ) Medical Research

( ) Crime, Legal Related

( ) Employment, Job Related

( ) Agriculture, Food, Nutrition

( ) Housing, Shelter

( ) Public Safety, Disaster Preparedness and Relief

( ) Recreation, Sports, Leisure, Athletics

( ) Youth Development

( ) Human Services

( ) International, Foreign Affairs, and National Security

( ) Civil Rights, Social Action, Advocacy

( ) Community Improvement, Capacity Building

( ) Philanthropy, Voluntarism, and Grantmaking

( ) Science and Technology Research Institutes

( ) Social Science Research Institutes

( ) Public, Society Benefit

( ) Religion, Spiritual Development

( ) Mutual/Membership Benefit Organizations

51) Are 51% or more of your organization's programs targeted to or on specific behalf of one of these populations?

Select all that apply.

[ ] People of Color

[ ] Lesbian, Gay, Bisexual, Transgender (LGBT)

[ ] Immigrants

52) In what year was your organization founded?

Please do not include any letters, symbols, or punctuation.

_____

53) Which of the following organizational life-cycle stages most closely describes your current organization at this time?

Select one.

( ) <u>Start-Up/New</u> - Simple programs are initiated or a mix of diverse and non-integrated activities.

( ) <u>Adolescent</u> - Programs begin to establish themselves in the market. Often demand is greater than capacity.

( ) <u>Growing Mature/Sustainable</u> - Core programs are established and recognized in the community. Programs functioning well.

( ) <u>Stagnation/Burn out</u> - No longer meeting market needs. Decline in product quality.

( ) <u>Renewal</u> - Long range program planning. New programs are added & deleted as market dictates.

( ) <u>Decline/Shut-Down</u> - Loss of credibility with funders and clients. Major reduction in referrals.

54) What is the annual operating budget of your organization this fiscal year?

( ) I don't know.

( ) $: *(Round to nearest 1000. Enter whole numbers only. Please do not include any letters, symbols, or punctuation.)* _____

55) How many paid staff does your organization employ?

Enter total FTE paid staff (e.g. one full time and one half time FTE = 1.5). Please do not enter any letters or symbols.

_____

56) How many paid staff work primarily in fund development (do not include your ED position)?

Enter total FTE paid staff (e.g. one full time and one half time FTE = 1.5). Please do not enter any letters or symbols.

_____

57) In what zip code is your headquarters office located?

_____

Please tell us about you.

58) How would you assess <u>YOUR current level of competence</u> (capability, skill, and knowledge) within each of the following aspects of fund development?

	None at all	Novice	Knowledgeable	Expert
Current and prospective donor research	( )	( )	( )	( )
Securing the gift	( )	( )	( )	( )
Relationship building	( )	( )	( )	( )
Volunteer involvement	( )	( )	( )	( )
Management	( )	( )	( )	( )
Accountability	( )	( )	( )	( )

59) To be successful in your ED position, how important do you think it is for you to have expertise within each of the following fund development areas?

	Not at all important	A little important	Moderately important	Very important
Current and prospective donor research (develop a prospect list, prospect analysis, utilize data	( )	( )	( )	( )

management system, prioritize and plan solicitations)				
Securing the gift (development of the case, creation of solicitation program(s), asking for and securing gifts, development of solicitation materials, evaluation of solicitation program)	( )	( )	( )	( )
Relationship building (donor cultivation, acknowledgment and recognition, communications and information to donors)	( )	( )	( )	( )
Volunteer involvement (recruitment, oversight, support, evaluation, and engagement of volunteers; engagement and support of board members)	( )	( )	( )	( )
Management (involvement in setting organizational strategy and budgets, implementation of fund development plans, recruit, train support, and supervise (when appropriate) staff, and implementation of development policies)	( )	( )	( )	( )
Accountability (reporting, ensuring and monitoring donor intent, compliance)	( )	( )	( )	( )

60) In your executive director position, is your primary responsibility solicitation/asking individual donors for contributions?

( ) Yes

( ) No

61) To what extent do you enjoy solicitation/asking individual donors for contributions?

( ) I strongly dislike asking for contributions.

( ) I dislike asking for contributions.

( ) I like asking for contributions.

( ) I love asking for contributions.

( ) I don't know, I have never made an ask.

62) What is your age?

Please do not enter any letters, symbols, or punctuation.

_____

63) What is your gender?

( ) Male

( ) Female

( ) Transgender

( ) Inter-sex

( ) Decline to state

64) What is your race/ethnicity?

Select one.
( ) African American

( ) Asian/Pacific Islander

( ) Latino/a

( ) Middle Eastern

( ) Native American

( ) White/Anglo

( ) Multi-Racial

( ) Other: _____

65) In your entire career, have you ever held a position where development was your primary role (not including executive director positions)?

( ) Yes

( ) No

66) What is your annual salary (not including benefits)?

Round to the nearest 1000. Enter whole numbers only. Please do not enter any letters, symbols, or punctuation.

_____

Thank You!

If you have either an interesting success story or lessons learned story in the area of fund development and/or development staffing that you would like to share with CompassPoint for the purposes of this research, please contact Erin Lingren at erinl@compasspoint.org or call 415-541-9000 ext 329.

Thank you for your contribution to this research!