

MISSION, PROGRAM, RECIPIENTS

Assessment	Comments
<ol style="list-style-type: none"> 1. My organization has a published mission statement; a published vision statement. 2. My organization has a strategic plan and planning process. 3. Fundraising priorities are derived from the strategic plan. 4. Priorities are spelled out in fundraising goals and objectives that are measurable. 5. My organization produces an annual report that demonstrates how it has advanced the mission and priorities and how gifts are used. 	

BOARD MEMBERS

Assessment	Comments
<ol style="list-style-type: none"> 1. Board members are willing to underwrite the mission, especially with their own philanthropy. 2. Board members know the mission, function, and structure. 3. Board members can answer questions about the mission, function and structure. 4. Board members of my organization regularly evaluate how we provide information and respond to the philanthropy of donors. 	

FINANCES

Assessment	Comments
<ol style="list-style-type: none"> 1. My organization publishes an annual financial report. 2. The annual report is mailed to all donors. 3. Donors are encouraged to respond to the information contained in the annual report. 4. The annual report includes a narrative about how the organization is meeting its programmatic obligations and its mission. 	

GIFT USE

Assessment	Comments
<ol style="list-style-type: none"> 1. My organization has clearly stated gift acceptance policies and procedures. 2. My organization has a procedure for declining gifts that are inappropriate. 3. My organization has an internal system to periodically review the policies and procedures for accepting gifts. 4. The fund-raising officers have been trained in the gift acceptance policies & procedures. 	

ACKNOWLEDGMENT and RECOGNITION

Assessment	Comments
<ol style="list-style-type: none"> 1. The gift-receipting staff is knowledgeable about the mission, purpose and priorities of the organization. 2. Gift acknowledgments are timely, accurate and appreciative. 3. Recognition opportunities are supported by policies & procedures. 4. My organization has a clear and enforced one-time naming policy and procedure. 5. Gift clubs are periodically reviewed and revised—based on donor behavior. 	

PRIVACY, COURTESY and RELIABILITY

Assessment	Comments
<ol style="list-style-type: none"> 1. My organization has written and enforced policy and procedure for respecting and maintaining a donor's privacy. 2. All employees are evaluated on their adherence to the privacy policy and this is part of the job description. 3. My organization carefully considers any plans to publish donors' names. 4. Those who speak with donors on behalf of my organization are carefully scripted, trained or coached. 	