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STRATEGIC DIRECTIONS FOR ADVANCEMENT SERVICES

An Assessment of Stewardship Activities Based on the Donor Bill of Rights

MISSION, PROGRAM, RECIPIENTS

Assessment

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 served its constituency.

BOARD MEMBERS

Assessment

1. Board members are willing to underwrite the mission, including with their own philanthropy.
2. Board members know the mission, function, constituency and structure of the organization.
3. Board members can answer questions about the mission, function, constituency and structure of the organization.
4. Board members regularly evaluate how my organization provides information and responds to the philanthropy of donors.

FINANCES

Assessment

1. My organization publishes an annual financial report.
2. The annual report is made available to all donors and prospects.
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 uses gifts accountably.

GIFT USE

Assessment

1. My organization has clearly stated gift-acceptance policies and procedures.
2. My organization has a procedure for declining gifts that are inappropriate or unusable.
3. My organization has an internal system to review periodically the policies and procedures for accepting and declining gifts.
4. The fund-raising officers have been trained in applying gift-acceptance policies and procedures.

ACKNOWLEDGMENT and RECOGNITION

Assessment

1. The gift-receipting staff is knowledgeable about the mission, purpose and priorities of my organization.
2. Gift acknowledgments are timely, accurate and appreciative.
3. Recognition opportunities are supported by policies and 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

1. My organization has written and enforced policies and procedures for respecting and maintaining the privacy of donors and prospects.
2. All employees are evaluated on their adherence to the privacy policy and this is part of their job descriptions.
3. My organization carefully considers any plans to publish the names of donors and prospects.
4. Those who speak with donors on behalf of my organization are carefully scripted, trained or coached.