



## 2017 Benchmarking Survey

### BASELINE

1. Please provide survey contact information:
  - Year Association Established: \_\_\_\_\_
  - Year Development Program/Foundation-established: \_\_\_\_\_
  - Number of Association professional members: \_\_\_\_\_
  - Number of Student members: \_\_\_\_\_
  - What best describes your organization?
    - Association Foundation (includes a supporting foundation to an organization)
    - Association/Parent Organization (includes fundraising department/development office within an organization)
    - For Profit (includes consultants, vendors, etc.)
2. Select the answer below that best describes your Association/Foundation:
  - Professional
  - Trade
  - Engineering / Scientific
  - Medical Society
3. Which of the following programs does your foundation currently fund?
  - Research
  - Education and Advocacy
  - Scholarships
  - Other (please explain): \_\_\_\_\_

### STAFF STRUCTURE

4. Please use the spaces below to identify the number of fundraising staff specifically dedicated to the development program at your Association/Foundation. Please use numerical format.
  - Support Staff (includes Assistants, Database entry, etc.) \_\_\_\_\_
  - Professional Support Staff (includes Prospect Research, Development, Communications, Web Design, etc.) \_\_\_\_\_
  - Fundraising Staff (includes Chief Development Officer, Major Gifts Officer, etc.) \_\_\_\_\_
  - Program staff (includes scholarship/grants managers) \_\_\_\_\_
5. Do you anticipate increasing your Association/Foundation staff positions during the next 12 months? YES/NO
6. Do you anticipate reducing your Association/Foundation staff positions during the next 12 months? YES/NO
7. Select the answer below that best reflects the development budget for your operations during the most recently completed fiscal year. This number should include development team salaries and overhead, but not marketing, etc.

- <\$500,000
- \$501,000 - \$999,999
- \$1,000,000 - \$2,499,999
- \$2,500,000 - \$4,999,999+

8. During the most recently completed fiscal year, your development budget was:

- Unchanged
- Increased
- Reduced
- Please specify the percentage of change:\_\_\_\_\_

#### **FUNDS RAISED**

9. During the last fiscal year, your Association/Foundation's annual fundraising goal was:

- Unchanged
- Increased by less than 5%
- Increased by more than 5%
- Increased by more than 10%
- Reduced by less than 5%
- Reduced by more than 5%
- Please specify the percentage of change:\_\_\_\_\_

10. Select the answer below that best reflects membership giving to the foundation.

- Below 2%
- 2%-5%
- 5%-7%
- 7%-10%
- 10%-15%
- If greater than 15%, please share percentage:\_\_\_\_\_

11. Please indicate (in dollars) the total gifts and pledges raised by your Association/Foundation during the last fiscal year, including signed pledges. This does not include payments on pledges signed in prior years, or gifts in kind. Please use numerical format.

12. Please indicate your approximate amount of donor restricted and unrestricted gifts in the last fiscal year. The total should equal your response to Question #11. Please use numerical format.

- Restricted:\_\_\_\_\_
- Unrestricted:\_\_\_\_\_

13. For each source listed below, please indicate (in dollars) the approximate amount raised from that source during the last fiscal year, including signed pledges and cash. This does not include payments on prior pledges. The total should equal your response to Question #11. Please use numerical format. \*Please note, family foundations should be counted as individual gifts.

- Individual:\_\_\_\_\_
- Foundation:\_\_\_\_\_
- Corporation:\_\_\_\_\_
- Trusts & Estates:\_\_\_\_\_
- Total:\_\_\_\_\_

14. For each source listed below, please indicate the approximate \*NUMBER of donors from that source during the last fiscal year, including pledges. This does not include payments on prior pledges. Please use numerical format, e.g., 10. Include all donors who receive a tax receipt from your organization. \*Please note, family foundations should be counted as individual gifts.

- Individual: \_\_\_\_\_
- Foundation: \_\_\_\_\_
- Corporation: \_\_\_\_\_
- Trusts & Estates: \_\_\_\_\_
- Total: \_\_\_\_\_

15. For each fundraising category listed below, please indicate (in dollars) the approximate amount raised during the last fiscal year, including gifts, signed pledges, and cash. This does not include payments on prior pledges. The total should equal your response to Question #11. Please use numerical format.

- Major Gifts (\$5,000+ from all sources): \_\_\_\_\_
- Bequest and Planned Gifts: \_\_\_\_\_
- Direct Mail: \_\_\_\_\_
- Dues Check-Off: \_\_\_\_\_
- Special Events: \_\_\_\_\_
- Online Giving: \_\_\_\_\_

16. Do you use a dues check-off for your annual fundraising?

- Yes, that's all we use
- Yes, that is one part
- No

17. Do you ask for a specific dollar amount for your dues check-off?

- Yes
- No
- If yes, please provide the specific dollar amount: \$ \_\_\_\_\_

18. How many times a year does your foundation solicit for annual support? \_\_\_\_\_

19. Does the association/parent organization make a financial contribution to the foundation (this could include cost of staff, or other operational costs)?

- Yes
- No
- Does not apply

20. Does the association/parent organization make an in-kind contribution (this could include the cost of office space, shared administrative services (HR, Finance, IT))?

- Yes
- No
- Does not apply

21. How is the Foundation/Development Office present at your Association's Annual Conference? (check all that apply)

- Donor ribbons on name badges
- Booth or table where attendees can make a gift
- Sponsors one or more sessions at the conference

- Sponsors a special speaker at the meeting
- Is recognized along with foundation donors at the opening conference session from the podium
- Hosts fundraising events/activities
- Foundation materials available at the meeting
- Provides a donor lounge
- Not present at Annual Conference

**BOARD RELATIONSHIP:** For questions 22-27, please use Foundation and Development Advisory Board interchangeably.

22. Does your Foundation share a Board with the Association/Parent Organization?

- Yes, it is overlapping
- No, it is separate
- Does not apply

23. Please indicated the number of:

- Foundation Board members: \_\_\_\_\_
- Overlapping board members \_\_\_\_\_

24. Is your Association/Parent Organization's Board active in Foundation fundraising?

- Yes
- No
- Does not apply

25. What is your Foundation Board personal giving policy?

- Required but no minimum
- Minimum gift required to maintain position on the Board
- "Give or get" minimum required to maintain position on the Board
- No gift required
- Strongly encourage but not required

26. What percentage of your Foundation Board made a contribution to the Foundation in the last fiscal year?

- <50%
- 50%-74%
- 75%-99%
- 100%
- N/A

27. Please provide the average Foundation Board member personal contribution: \$\_\_\_\_\_