

## Organization Self Questionnaire



Organization Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Contact Email: \_\_\_\_\_ Contact Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Organization Address: \_\_\_\_\_

\_\_\_\_\_

Organization website address: \_\_\_\_\_

- 1) Purpose of your Organization:
  
- 2) # of current constituents/clients/patrons (activity in the past 2 years):
- 3) # of current donors/contributors/members (activity in the past 3 years):
- 4) Do you have complete contact information and history records for the above constituents and donors?
- 5) Total Annual Budget:
- 6) Total Annual Income projections - Earned: \_\_\_\_\_ Contributed: \_\_\_\_\_
- 7) Average Ratio of Earned income to Contributed income:
- 8) Marketing/Communications Budget per year:
- 9) Number of Board Members:
- 10) Average contribution per board member:
- 11) What, if any, are your contribution requirements for your board members:
  
- 12) Average total of individual giving per fiscal year:
- 13) Average total of corporate/business giving/sponsorship per fiscal year:
- 14) Primary fundraising methods:
  
- 15) What special fundraising events have you tried?

16) Which of these were the most directly related to the primary purpose of your organization (question #1)?

17) Where these events financially successful? Did they also forward your mission and/or further develop valuable relationships? Please explain:

18) Does your organization "sell a product"? If so, what?

19) Sale prices per unit (top, bottom, average)?

20) Primary Marketing methods:

21) Estimate of marketing cost per dollar of earned income brought in:

22) Please list your staff positions:

23) What software do you use to track your members, contributions, sales, etc?:

24) What do you feel your organization does very well?

25) What do you feel your organizations weaknesses are at this time?

26) What do you feel your staff struggles with the most?

27) What are your goals for the next year?

28) What are your goals for the next 5 years?

Thank you for completing this questionnaire. All responses shared with me will be kept in the strictest confidence. If you'd like to talk to me about how I might help your organization, please contact me. You can send me this questionnaire and we can talk a bit about what we might work on together. If nothing else, I hope this questionnaire helps you to see the big-picture of your organization a bit better. Sometimes it can be a huge help just stepping back to take a look.

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