



## 2019 Benchmarking Survey

### BASELINE

1. Select the answer below that best describes your Association/Foundation:
  - Professional
  - Trade
  - Engineering / Scientific
  - Medical Society
  
2. Please provide survey contact information:
  - Year Association Established: \_\_\_\_\_
  - Year Development Program/Foundation-established: \_\_\_\_\_
  - Number of Association professional members: \_\_\_\_\_
  - Number of Student members: \_\_\_\_\_
  - Number of retired/life 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)
  
3. Which of the following programs does your foundation currently fund?
  - Research
  - Education
  - Advocacy
  - Scholarships
  - Other (please explain): \_\_\_\_\_
  
4. What is your IRS nonprofit designation? \_\_\_\_\_
  
5. What is your total operating budget? \_\_\_\_\_

### STAFF STRUCTURE

6. Please use the spaces below to identify the number of FTE 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) \_\_\_\_\_

7. Do you anticipate increasing your Association/Foundation staff positions during the next 12 months? YES/NO
8. Do you anticipate reducing your Association/Foundation staff positions during the next 12 months? YES/NO
9. Select the answer below that best reflects the fundraising 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+
10. During the most recently completed fiscal year, your development expense budget was:
  - Increased
  - Decreased
  - Did not change

**FUNDS RAISED (Please use numerical format for all applicable answers)**

11. During the last fiscal year, did your annual fundraising goal:
 

a) Increase	By what %
b) Decrease	By what %
c) Remain the same	
12. Please indicate the percentage of Association members that giving to the foundation: \_\_\_\_\_
13. 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.  
\_\_\_\_\_
14. Please indicate how much of the total from Question #13 was.
  - Restricted: \_\_\_\_\_
  - Unrestricted: \_\_\_\_\_
15. Please indicate approximately how much of the total dollars raised from Question #13 was from the following constituent types. \*Please note, family foundations should be counted as individual gifts.
  - Individual: \_\_\_\_\_
  - Foundation: \_\_\_\_\_
  - Corporation: \_\_\_\_\_
  - Government: \_\_\_\_\_
  - Trusts & Estates: \_\_\_\_\_
  - Total: \_\_\_\_\_
16. For each constituent type, please indicated the NUMBER of gifts. \*Please note, family foundations should be counted as individual gifts.
  - Individual: \_\_\_\_\_
  - Foundation: \_\_\_\_\_
  - Corporation: \_\_\_\_\_
  - Government: \_\_\_\_\_

- Trusts & Estates: \_\_\_\_\_
- Total: \_\_\_\_\_

17. For each fundraising category listed below, please indicate the approximate amount raised during the last fiscal year, including gifts, signed pledges, and cash. This does not include payments on prior pledges. Gifts can fall into more than one category.

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

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

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

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

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

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

21. What is your donor retention rate? \_\_\_\_\_

22. What is your revenue retention rate? \_\_\_\_\_

23. 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

24. 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

25. 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
- Other (please share): \_\_\_\_\_

**BOARD RELATIONSHIP:** For questions 26-31, please use Foundation and Development Advisory Board interchangeably.

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

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

27. Please indicated the number of:

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

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

- Yes
- No
- Does not apply

29. 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

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

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

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