

Revenue Source Diagnostic Tool

Revenue source	Underperformance symptoms	Diagnosis and corrective action
<i>Annual or sustained gifts</i>	<ul style="list-style-type: none"> • Low average gift • Low response rate • High number of bad addresses or contact information 	Eliminate the possible problem by trial and error. Ask: Is it the list of names, the offer, the signor, the package copy/design, or a poor choice for direct response? Your organization may decide to employ a consultant to quickly diagnose and solve these issues.
<i>Major gifts</i>	<ul style="list-style-type: none"> • No meeting appointments are happening • Asks are taking place for low amounts of money • Volunteers are reverting to annual asking techniques 	Reevaluate prospect qualifications and any staff training on acquiring appointments, asking, and closing. Remember that qualifying prospects requires time as well as skill training.
<i>Planned gifts</i>	<ul style="list-style-type: none"> • No plans are written • Requests for information are not turning into leads for meetings 	Work to motivate more timid staff and to improve the lead generation system. When asking for planned gifts it is essential for staff to get out of the office and into the field.
<i>Foundation grants</i>	<ul style="list-style-type: none"> • Lots of letters and some proposals are going out but no money is coming in 	Work to improve your understanding of grantsmanship by attending a grant-writing seminar or class. Also, consider recruiting board members to develop personal relationships with foundation directors.
<i>Cause-related marketing</i>	<ul style="list-style-type: none"> • No money comes in from the cause-related marketing 	Reevaluate your organization's contract with the for-profit organization and renegotiate contract terms. First find the company's limit (point where they say "no") and work backwards from there.

Revenue source	Underperformance symptoms	Diagnosis and corrective action
<i>Corporate giving programs</i>	<ul style="list-style-type: none"> • Lots of letters and some proposals are going out but no money is coming in 	Encourage your organization's leadership (board, CEO, etc.) to reach out to corporate leadership and cultivate these high-level relationships. Strive to make the corporate giving program beneficial for both parties.
<i>Earned income activities</i>	<ul style="list-style-type: none"> • No products sold • No leads 	Develop incentives to motivate sales. Reevaluate the concept of earned income to see if it fits within your organization's model and whether the idea was well-executed.
<i>Unrelated business income</i>	<ul style="list-style-type: none"> • No products sold • No leads 	Develop incentives to motivate sales. Reevaluate the concept of unrelated business income to see if it fits within your organization's model and whether the idea was well-executed.
<i>In-kind donations</i>	<ul style="list-style-type: none"> • Only a few small gifts come in 	Passive staff and poor lead generation system. Must get the staff into the field and out of the office.
<i>Supporting organizations</i>	<ul style="list-style-type: none"> • Many meetings occur but no firm commitment to raise funds 	Evaluate whether your organization's senior leadership is supportive of the partnership. Work with leadership from both organizations to ensure the arrangement is beneficial for both parties.
<i>Benefit events</i>	<ul style="list-style-type: none"> • Poor attendance • Wrong people attending • No money raised 	Identify event weaknesses by analyzing event design, scheduling, location, and leadership. Brainstorm ways to get both event and community leaders engaged in the promotional process. Reevaluate how to make fundraising the foundational theme of the event.

Revenue source	Underperformance symptoms	Diagnosis and corrective action
<i>State and local municipalities</i>	<ul style="list-style-type: none"> • Many meetings but no firm commitment for funds 	Work to improve relationships with key legislators and to prove the political value of your organization's work.
<i>Churches and denominations</i>	<ul style="list-style-type: none"> • A few meetings, with lapses of inactivity/silence • No firm commitment for funds 	Work to improve and generate support from church leadership.
<i>Federated funds</i>	<ul style="list-style-type: none"> • Low average gift • Low response rate • High number of bad addresses and contact information 	Work to motivate more timid staff and improve organizational marketing skills. Motivate staff to work with campaign/federation staff.
<i>Online donations</i>	<ul style="list-style-type: none"> • Low average gifts • Low number of gifts • Few hits or participants in online spaces 	Update online spaces more frequently. Identify key supporters and staff members to actively highlight the organization on their own pages.