

# THE ANNUAL GIVING ASSESSMENT™

## Purpose

The Annual Giving Assessment™ is a comprehensive diagnostic tool designed to help nonprofit organizations evaluate the overall health, maturity, and sustainability of their annual giving program.

Unlike campaign-specific evaluations, this assessment examines the systems, strategies, donor experiences, and operational practices that influence long-term fundraising success.

The assessment is built around the five pillars of The 5M Architecture™ and provides a roadmap for identifying strengths, uncovering gaps, and prioritizing future growth opportunities.

## Assessment Instructions

Rate each statement using the following scale:

| Score | Description       |
|-------|-------------------|
| 1     | Strongly Disagree |
| 2     | Disagree          |
| 3     | Neutral           |
| 4     | Agree             |
| 5     | Strongly Agree    |



## SECTION 1: MISSION

### Purpose & Case for Support

We have a clearly defined annual giving strategy.

Score: \_\_\_\_

We can clearly articulate the impact annual giving has on our mission.

Score: \_\_\_\_

Our case for support is current and compelling.

Score: \_\_\_\_

Donors understand how their gifts create change.

Score: \_\_\_\_

Annual giving priorities align with organizational goals.

Score: \_\_\_\_

Campaigns are built around strategic funding needs rather than budget gaps.

Score: \_\_\_\_

Mission Total: \_\_\_\_ / 30

## SECTION 2: MARKET

### Audience & Segmentation

**We actively segment our donor database.**

**Score: \_\_\_\_**

**We understand the motivations of our key donor groups.**

**Score: \_\_\_\_**

**We personalize communications whenever possible.**

**Score: \_\_\_\_**

**We have a strategy for acquiring new donors.**

**Score: \_\_\_\_**

**We have a strategy for retaining existing donors.**

**Score: \_\_\_\_**

**We actively identify opportunities for donor growth.**

**Score: \_\_\_\_**

**Market Total: \_\_\_\_ / 30**

## SECTION 3: MESSAGE

### Communications & Storytelling

**Our fundraising messages are donor-centered.**

**Score: \_\_\_\_**

**We consistently communicate impact.**

**Score: \_\_\_\_**

**Storytelling is incorporated into our campaigns.**

**Score: \_\_\_\_**

**Messaging remains consistent across channels.**

**Score: \_\_\_\_**

**Appeals clearly communicate urgency.**

**Score: \_\_\_\_**

**Calls-to-action are clear and compelling.**

**Score: \_\_\_\_**

**Message Total: \_\_\_\_ / 30**



## SECTION 4: MOMENTUM

### Stewardship & Engagement

We have a formal stewardship plan.

Score: \_\_\_\_

Donors receive timely acknowledgments.

Score: \_\_\_\_

Donors receive impact reports throughout the year.

Score: \_\_\_\_

We actively cultivate recurring donors.

Score: \_\_\_\_

We have strategies for reactivating lapsed donors.

Score: \_\_\_\_

Donor retention is measured and monitored.

Score: \_\_\_\_

Momentum Total: \_\_\_\_ / 30

## SECTION 5: MEASUREMENT

### Data, Systems & Performance

Our CRM data is accurate and reliable.

Score: \_\_\_\_

We maintain consistent coding and tracking practices.

Score: \_\_\_\_

We regularly review fundraising KPIs.

Score: \_\_\_\_

We conduct post-campaign evaluations.

Score: \_\_\_\_

Reporting informs fundraising decisions.

Score: \_\_\_\_

We have confidence in our fundraising data.

Score: \_\_\_\_

Measurement Total: \_\_\_\_ / 30



## SECTION 6: INTEGRATED FUNDRAISING

*This is where your methodology becomes unique.  
Most fundraising assessments stop at the previous five sections.  
This section measures whether the ecosystem is actually integrated*

**Our fundraising channels work together strategically.**

**Score: \_\_\_\_**

**Direct mail and email campaigns are coordinated.**

**Score: \_\_\_\_**

**Stewardship efforts support acquisition efforts.**

**Score: \_\_\_\_**

**Data informs messaging decisions.**

**Score: \_\_\_\_**

**Campaign planning includes multiple departments when appropriate.**

**Score: \_\_\_\_**

**We view fundraising as an interconnected system rather than isolated tactics.**

**Score: \_\_\_\_**

**Integrated Fundraising Total: \_\_\_\_ / 30**

## TOTAL ASSESSMENT SCORE

Mission \_\_\_\_\_ / 30

Market \_\_\_\_\_ / 30

Message \_\_\_\_\_ / 30

Momentum \_\_\_\_\_ / 30

Measurement \_\_\_\_\_ / 30

Integrated Fundraising \_\_\_\_\_ / 30

Total Score \_\_\_\_\_ / 180



## ANNUAL GIVING MATURITY LEVELS™

**36–71**

### Reactive Fundraising

Fundraising efforts are largely transactional and campaign-driven with limited strategic integration.

**Primary Focus:** Building foundational systems and processes.

**72–107**

### Structured Fundraising

Core fundraising practices exist, but execution is inconsistent and opportunities for integration remain.

**Primary Focus:** Strengthening donor experiences and operational consistency.

**108–143**

### Strategic Fundraising

Fundraising is guided by clear goals and intentional planning, with growing attention to donor engagement and stewardship.

**Primary Focus:** Improving integration and long-term donor value.

**144–167**

### Integrated Fundraising

The organization demonstrates alignment between strategy, communications, stewardship, and data.

**Primary Focus:** Scaling sustainable growth.

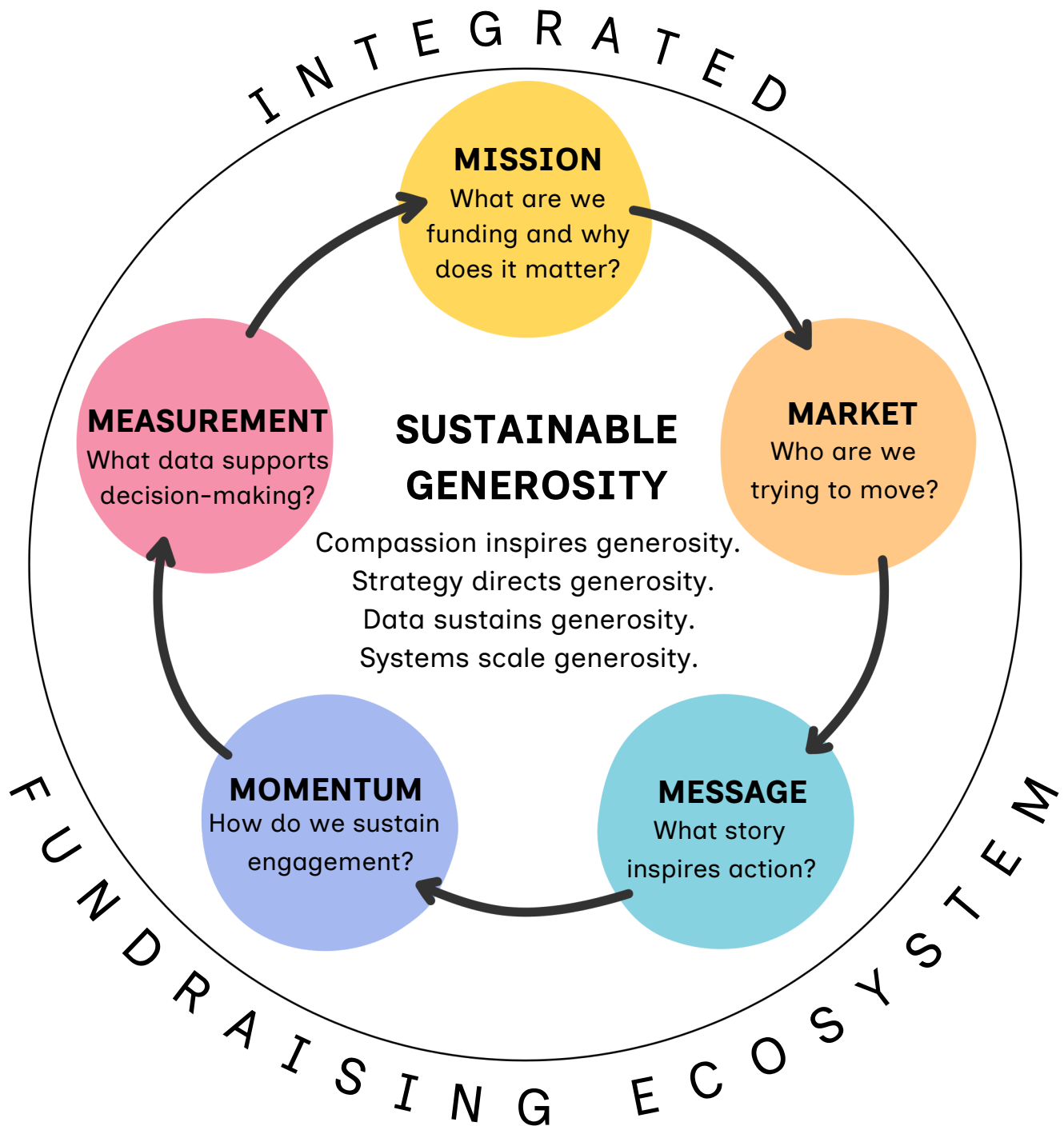
**168–180**

### Sustainable Generosity

The organization exemplifies the principles of The 5M Architecture™ and operates a highly integrated fundraising ecosystem capable of generating long-term philanthropic impact.

**Primary Focus:** Innovation, optimization, and leadership development.

# The 5M Architecture™



An integrated fundraising ecosystem where Mission, Market, Measurement, Message, and Momentum work together to create Sustainable Generosity.