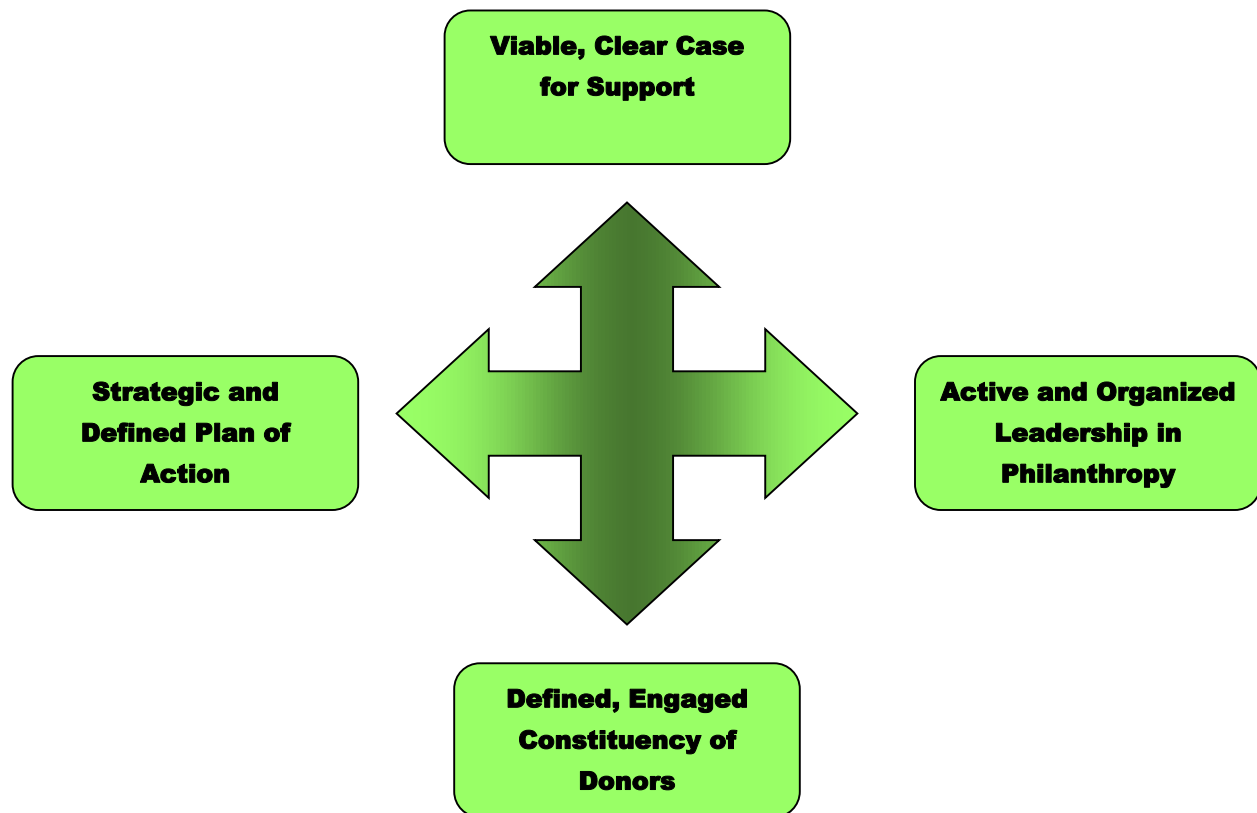


A BALANCED PHILANTHROPY SCOREBOARD

An effective tool in managing the core components of a successful fundraising program is the **Balanced Philanthropy Scoreboard**:



In a balanced philanthropy scoreboard, four specific areas are organized to align and monitor organizational performance against philanthropic outcomes. These four areas are the cornerstones to successful fundraising.

- 1. A viable, well defined case for support.** Every fundraising effort begins with a solid and well defined case for support, which spells out specifically why philanthropy is critical to your efforts and to your constituents. Feedback on the case for support provided by your constituency during a feasibility study, or ongoing informal feedback, helps to assess the emotional impact of your case; its ability to clearly articulate the need for fundraising; and its clarity in detail on how your effort and philanthropy will meet the specified needs. A viable case is the foundation for the development of your fundraising goals, donor prospect pool and solicitation plans.



2. **Active and organized leadership.** Board, Administration and Volunteer leadership are at the heart of your philanthropy. Active leadership is dedicated to the success of philanthropy. All leadership represents their dedication through an early and regular commitment to personal contribution, vigorous pursuit of a philanthropy QI process through assessment and reporting tools, and their influential participation in the identification and cultivation of donor prospects. Organized leadership has defined roles and responsibilities, a comprehensive structure in which to operate efficiently and a work plan in which to carry out tasks.
3. **A defined, engaged constituency.** A balanced philanthropy program, set to succeed, requires a defined pool of qualified prospects to solicit: donors who have been active, who have established relationships with persons close to the organization, who have shown their financial support consistently in the past or who have shown an affinity for like programs and services, who are long term donors to the organization, and who are passionate about the mission of the organization and in helping to carry out that mission.
4. **A plan of action.** The success of all fundraising efforts relies on the equalized execution of both the art of relationship building and the more analytical planning and tracking of actionable outcomes. A well developed, integrated plan of action, is one which outlines the composition of the administration, plots critical time stamps for benchmarking important milestones, has a schedule of deliverables (programmatic and financial) and of solicitations, and includes accountability factors with specific dates of achievement. A good plan of action incorporates all aspects of the campaign, and specifically delineates the “who, how, where, when and what” of qualified prospect solicitations through briefs and a regular schedule of reports.

While financial measures remain the strategic outcome of the philanthropic effort, they are not measured in this tool but instead are captured in a separate dashboard developed for monitoring philanthropic program outcomes.

The development and use of this performance measurement framework will ensure that your organization is instituting and leveraging a culture of philanthropy.