

## Self Assessment: Gift Officers

Read each of the following statements and rate your program according to the scale below. Don't spend too much time thinking about each statement; your first instinct is usually the best one. If you're not certain, make your best guess or go with your gut instinct. If you don't think it applies, or if you feel neutral about it, rate it as 3.

*Strongly agree = 5    Agree = 4    Neutral = 3    Disagree = 2    Strongly disagree = 1*

1	It is clear which prospects I am responsible for cultivating and soliciting.	
2	The number of prospects in my portfolio is manageable and has a good balance of current and prospective leadership donors.	
3	There is a system in place for keeping my portfolio current and fresh, including qualifying, disqualifying, and transitioning to other relationship managers as appropriate, and I develop and maintain clear plans for cultivating, soliciting, and stewarding each one of my key prospects.	
4	I am comfortable in my ability to conduct research on individual prospects, and generally feel prepared going into meetings with prospects.	
5	I am effective at securing meetings with prospects.	
6	I am comfortable and effective at running meetings with prospects both virtually and in person.	
7	I have a clear understanding of the individual interests of my top prospects, and know how to ask strategic questions to better understand my prospects.	
8	I understand the differences between annual, major, and planned giving and can articulate the importance of annual giving in a clear and compelling way, alongside developing strategies to optimize type of giving with my prospects.	
9	I am comfortable making a verbal ask and addressing objections as needed.	
10	I understand how to determine the most appropriate ask amount for each of my prospects.	
11	I can articulate the various levels of my institution's giving societies and the benefits of membership.	
12	I have and use a variety of channels, tools, and materials to cultivate my prospects including email, phone calls, brochures, video, etc.	
13	I look for opportunities to get my prospects actively involved in advancement activities including volunteer roles, class reunion campaigns, gift challenge sponsorship, giving days, and other campus events.	
14	I follow up with prospects after meetings in prompt, consistent, and personal ways.	
15	I write and share contact reports consistently and thoroughly after each contact I have with a prospect.	

*Self Assessment: Frontline Gift Officers (con't)*

16	I know how write (if applicable) and/or clearly explain gift proposals and agreements to my prospects.	
17	I have clear and reasonable goals for my work as a gift officer and there are processes in place to ensure productivity toward and accountability for those goals.	
18	I involve senior administrators and faculty in my prospect cultivation and/or stewardship efforts when appropriate.	
19	I meet regularly with other gift officers and development staff to discuss moves management strategies.	
20	I have access to ongoing training to help me improve my frontline fundraising skills, and understand how my current role as a frontline gift officer fits into my long-term career aspirations.	

*Total:* \_\_\_\_\_