# DEVELOPMENT ASSESSMENT

**Each sector of TAG's services presents its own challenges, so our assessments focus on how the nonprofit operates within its own sector. Ours is not a one-size-fits-all methodology. That is one of our distinctive traits.**

## Part I: Arts and Culture Development Assessments

The assessment begins with the creation of a Monthly Action Plan (MAP template) and an internal launch call with the TAG team members assigned to the client engagement.

1. Conduct the launch meeting/call with the client
    a. Coordinate calendars with client for scheduling.
    b. If JA is needed, we offer client options FIRST.
    c. Create the launch meeting agenda.

2. Request development materials: acknowledgement letters; annual fund letters; two most recent annual reports to the public, if available; two-year audited financial statement; templates for gift and pledge agreements; gift acceptance, gift recording, and gift recognition policies; position descriptions and staff resumes; standard brochures, if any; templates for c.g.a. agreements, if used; two most recent IRS Form 990s., and much more

    N.B.: Utilize the Information Request Checklist to ask for materials, information, and data on tab #1 of the file there. Tab #2 of the file lists all data required for the assessment and the order in which is to be formatted. Tab #3 lists the materials needed for a mini-marketing assessment.

3. Immediately schedule the report-out/bi-weekly meetings and the interim and final report presentation dates. Then set the standing agenda.

4. Create the email invitation to interviewees. Discuss with the client whether the client or TAG will tabulate responses and conduct follow-up calls for appointments.

5. Develop the staff and board questionnaire. Create and review the conversation accelerant with the client.

6. Request the data. Utilize the Data Request Form and coordinate all project needs with the TAG director of data analytics. Be very certain to point out to the client that the request form has many tabs to which the client's data team will need to upload information.

7. Conduct the biweekly calls and meetings. Set the call agenda and conduct calls/meetings.

8. Deploy the staff self-assessment/pre-interview worksheets. Send worksheets to all relevant staff.

9. Conduct the staff interviews. Schedule the meetings and record notes in the Interview Response Form.

10. Conduct the data assessment and review the wealth screening results. Work with the TAG director of data analytics on specific needs.

11. Present the interim report/update on the date scheduled in step 4. See this assessment of a theater and performing arts center as an example. The report should have the following sections.
    a. Introduction (including methodology and acknowledgments)
    b. Executive summary
    c. Current philanthropic landscape
    d. Key Findings and Analysis (including data slides, analysis, and predictive modeling)
    e. S.W.O.T. Analysis
    f. Recommendations (including new positions, costs, projected revenue, a timeline GANTT chart, and implementation processes and costs)
    g. Thank-you slide with contact information

12. Conduct Analysis of Development Materials, website and communications with the Marketing and Website Assessment Checklist.

13. Schedule board interviews. Schedule meetings and record notes in Interview Response Form. Send a thank-you note to each interviewee.

14. Conduct board and non-staff interviews. Schedule the meetings and record notes in Interview Response Form. Send a thank-you note to every interviewee.

15. Conduct benchmarking. Work with the TAG director of data analytics on specific needs.

16. Present the final report.
    a. Ensure all necessary materials are prepared and reviewed by TAG colleagues in advance.
    b. Prepare and proof the PowerPoint presentation.
    c. Be certain to prepare and collate all folders/books/leave-behind items.

17. Send a thank-you letter to the client's leader at the conclusion of the engagement.

## Part II: Community Building Development Assessments

The assessment begins with the creation of a Monthly Action Plan (MAP template) and an internal launch call with the TAG team members assigned to the client engagement.

1. Conduct the launch meeting/call with the client
    - Coordinate calendars with client for scheduling.
    - If JA is needed, we offer client options FIRST.
    - Create the launch meeting agenda.

2. Request development materials: acknowledgement letters; annual fund letters; two most recent annual reports to the public, if available; two-year audited financial statement; templates for gift and pledge agreements; gift acceptance, gift recording, and gift recognition policies; position descriptions and staff resumes; standard brochures, if any; templates for c.g.a. agreements, if used; two most recent IRS Form 990s., and much more

    N.B.: Utilize the Information Request Checklist to ask for materials, information, and data on tab #1 of the file there. Tab #2 of the file lists all data required for the assessment and the order in which is to be formatted. Tab #3 lists the materials needed for a mini-marketing assessment.

3. Immediately schedule the report-out/bi-weekly meetings and the interim and final report presentation dates. Then set the standing agenda.

4. Create the email invitation to interviewees. Discuss with the client whether the client or TAG will tabulate responses and conduct follow-up calls for appointments.

5. Develop the staff and board questionnaire. Create and review the conversation accelerant with the client.

6. Request the data. Utilize the Data Request Form and coordinate all project needs with the TAG director of data analytics. Be very certain to point out to the client that the request form has many tabs to which the client's data team will need to upload information.

7. Conduct the biweekly calls and meetings. Set the call agenda and conduct calls/meetings.

8. Deploy the staff self-assessment/pre-interview worksheets. Send worksheets to all relevant staff.

9. Conduct the staff interviews. Schedule the meetings and record notes in the Interview Response Form.

10. Conduct the data assessment and review the wealth screening results. Work with the TAG director of data analytics on specific needs.

11. Present the interim report/update on the date scheduled in step 4. The PowerPoint report should have the following sections.
    a. Introduction (including methodology and acknowledgments)
    b. Executive summary
    c. Key Findings and Analysis (including data slides, analysis, and predictive modeling)
    d. S.W.O.T. Analysis
    e. Recommendations (including new positions, costs, projected revenue, a timeline GANTT chart, and implementation processes and costs)
    f. Thank-you slide with contact information

12. Conduct Analysis of Development Materials, website and communications with the Marketing and Website Assessment Checklist.

13. Schedule board interviews. Schedule meetings and record notes in Interview Response Form. Send a thank-you note to each interviewee.

14. Conduct board and non-staff interviews. Schedule the meetings and record notes in Interview Response Form. Send a thank-you note to each interviewee.

15. Conduct benchmarking. Work with the TAG director of data analytics on specific needs.

16. Present the final report.
    a. Ensure all necessary materials are prepared and reviewed by TAG colleagues in advance.
    b. Prepare and proof the PowerPoint presentation.
    c. Be certain to prepare and collate all folders/books/leave-behind items.

17. Send a thank-you note to the client's leader at the conclusion of the engagement.

## Part III: Education Development Assessments

The assessment begins with the creation of a Monthly Action Plan (MAP template) and an internal launch call with the TAG team members assigned to the client engagement.

1. Conduct Launch Meeting/Call with Client
   a. Coordinate calendars with client for scheduling.
   b. If JA is needed, we offer client options FIRST.
   c. Create the launch meeting agenda.

2. Request development materials: acknowledgement letters; annual fund letters; two most recent annual reports to the public, if available; two-year audited financial statement; templates for gift and pledge agreements; gift acceptance, gift recording, and gift recognition policies; position descriptions and staff resumes; standard brochures, if any; templates for c.g.a. agreements, if used; two most recent IRS Form 990s, and much more

   N.B.: Utilize the Information Request Checklist to ask for materials, information, and data on tab #1 of the file there. Tab #2 of the file lists all data required for the assessment and the order in which is to be formatted. Tab #3 lists the materials needed for a mini-marketing assessment.

3. Immediately schedule the report-out/bi-weekly meetings and the interim and final report presentation dates. Then set the standing agenda.

4. Create the email invitation to interviewees. Discuss with the client whether the client or TAG will tabulate responses and conduct follow-up calls for appointments.

5. Develop the staff and board questionnaire. Create and review the conversation accelerant with the client.

6. Request the data. Utilize the Data Request Form and coordinate all project needs with the TAG director of data analytics. Be very certain to point out to the client that the request form has many tabs to which the client's data team will need to upload information.

7. Conduct the biweekly calls and meetings. Set the call agenda and conduct calls/meetings.

8. Deploy the staff self-assessment/pre-interview worksheets. Send worksheets to all relevant staff.

9. Conduct the staff interviews. Schedule the meetings and record notes in the Interview Response Form.

10. Conduct the data assessment and review the wealth screening results. Work with the TAG director of data analytics on specific needs.

11. Present the interim report/update on the date scheduled in step 4. Check out this assessment of a small university's advancement operations. The report should include the following sections.
    a. Introduction (including methodology and acknowledgments)
    b. Executive summary
    c. Philanthropic landscape
    d. Key Findings and Analysis (including data slides, analysis, and predictive modeling)
    e. S.W.O.T. Analysis

   f. Recommendations (including new positions, costs, projected revenue, a timeline GANTT chart, and implementation processes and costs)
   g. Thank-you slide with contact information

12. Conduct Analysis of Development Materials, website and communications with the Marketing and Website Assessment Checklist.

13. Schedule board interviews. Schedule meetings and record notes in Interview Response Form. Send a thank-you note to each interviewee.

14. Conduct board and non-staff interviews. Schedule the meetings and record notes in Interview Response Form. Send a thank-you note to each interviewee.

15. Conduct benchmarking. Work with the TAG director of data analytics on specific needs.

16. Present the final report.
    a. Ensure all necessary materials are prepared and reviewed by TAG colleagues in advance.
    b. Prepare and proof the PowerPoint presentation.
    c. Be certain to prepare and collate all folders/books/leave-behind items.

17. Send a thank-you note to the leader of the client at the conclusion of the engagement.

## Part IV: Health Care Development Assessments

The assessment begins with the creation of a Monthly Action Plan (MAP template) and an internal launch call with the TAG team members assigned to the engagement

1. Conduct the launch meeting/call with the client
   a. Coordinate calendars with client for scheduling.
   b. If JA is needed, we offer client options FIRST.
   c. Create the launch meeting agenda.

2. Request development materials: acknowledgement letters; annual fund letters; two most recent annual reports to the public, if available; two-year audited financial statement; templates for gift and pledge agreements; gift acceptance, gift recording, and gift recognition policies; position descriptions and staff resumes; standard brochures, if any; templates for c.g.a. agreements, if used; two most recent IRS Form 990s., and much more

   N.B.: Utilize the Information Request Checklist to ask for materials, information, and data on tab #1 of the file there. Tab #2 of the file lists all data required for the assessment and the order in which is to be formatted. Tab #3 lists the materials needed for a mini-marketing assessment.

3. Immediately schedule the report-out/bi-weekly meetings and the interim and final report presentation dates. Then set the standing agenda.

4. Create the email invitation to interviewees. Discuss with the client whether the client or TAG will tabulate responses and conduct follow-up calls for appointments.

5. Develop the staff and board questionnaire. Create and review the conversation accelerant with the client.

6. Request the data. Utilize the Data Request Form and coordinate all project needs with the TAG director of data analytics. Be very certain to point out to the client that the request form has many tabs to which the client's data team will need to upload information.
7. Conduct the biweekly calls and meetings. Set the call agenda and conduct calls/meetings.

8. Deploy the staff self-assessment/pre-interview worksheets. Send worksheets to all relevant staff.

9. Conduct the staff interviews. Schedule the meetings and record notes in the Interview Response Form.

10. Conduct the data assessment and review the wealth screening results. Work with the TAG director of data analytics on specific needs.

11. Present the interim PowerPoint report/update on the date scheduled in step 4. See this report for one of the most complex development assessments TAG has undertaken. The PowerPoint report should have the following sections.
    h. Introduction (including methodology and acknowledgments)
    i. Executive summary
    j. Philanthropic landscape
    k. Key Findings and Analysis (including data slides, analysis, and predictive modeling)
    l. S.W.O.T. Analysis
    m. Recommendations (including new positions, costs, projected revenue, a timeline GANTT chart, and implementation processes and costs)
    n. Thank-you slide with contact information

12. Conduct Analysis of Development Materials, website and communications with the Marketing and Website Assessment Checklist.

13. Schedule board interviews. Schedule meetings and record notes in Interview Response Form.

14. Conduct board and non-staff interviews. Schedule the meetings and record notes in the Interview Response Form and transcribe them into Survey Monkey for analysis purposes.

15. Conduct benchmarking. Work with the TAG director of data analytics on specific needs.

16. Present the final report (see form above).
    a. Ensure all necessary materials are prepared and reviewed by TAG colleagues in advance.
    b. Prepare and proof the PowerPoint presentation.
    c. Be certain to prepare and collate all folders/books/leave-behind items.

17. Conduct a follow-up meeting and afterward send a thank-you note to the client's leader at the conclusion of the engagement.