

# The Affinity Advancement Assessment<sup>©</sup>



INSTITUTE FOR CHARITABLE GIVING

Effective major gifts fundraisers are always seeking to improve their highest level of relationship building. Conveying benefits in a compelling way, analyzing reactions, representing the cause professionally, and reaching closure—these are all important to the major gift process.

Our **Affinity Advancement Assessment** measures how you are doing and provides benchmarks for improvement. Use the triple-A's with our best wishes for success.

- The Institute for Charitable Giving

## Here's How To Score Your Answers

- 1 = almost never
- 2 = seldom
- 3 = sometimes
- 4 = often
- 5 = almost always

QUESTIONS		POINTS
1	<b>If you leave a message, your donors and probable donors* return your calls or those of a key volunteer within 24 hours.</b>	
2	<b>You or a key volunteer can routinely get in to see your probable donors and donors.</b>	
3	<b>New probable donors are comfortable in telling you what they think about your organization.</b>	
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\*We do not use the word “prospects.” Throughout the piece, we use instead the term, “probable donor.”

QUESTIONS	POINTS
<p><b>4</b> Your probable donors and donors give you as much time as you request. They seem comfortable and at ease with you and do not place strict time limits on your visits or a visit from a key volunteer.</p>	
<p><b>5</b> You determine in advance what you hope to achieve in the visit. You set objectives prior to your session and review them with all who are going on the visit with you.</p>	
<p><b>6</b> You leave most of your calls feeling you better understand your probable donor and you now know what steps are necessary in advancing the relationship.</p>	
<p><b>7</b> You usually receive positive verbal and physical (i.e. body language) feedback from probable donors during your calls.</p>	
<p><b>8</b> You carefully consider who among your volunteers and executive leaders would be most effective natural partners with a probable donor — and work hard to involve them.</p>	
<p><b>9</b> The discussion does not stray. Probable donors and donors do not ask you about issues that don't pertain directly to your institution or the program or project of presumed interest. It is not difficult to keep them focused on your hoped-for agenda.</p>	
<p><b>10</b> Probable donors are attentive during your session. They participate fully and appear interested in your program.</p>	
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QUESTIONS	POINTS
<p><b>11 Probable donors and donors frequently tell you how much they enjoyed your visit and seem eager to get together again soon.</b></p>	
<p><b>12 Prospects and donors are attentive and enthusiastic when you discuss your organization, a project, or a program.</b></p>	
<p><b>13 During your visits, your contacts tell you a great deal about their interests or aspirations. Your meeting stimulates them to reveal more about themselves. Your visit provides a great deal of new information.</b></p>	
<p><b>14 You do an effective job when talking about your organization or the project at hand. You emphasize outcomes in human terms and results. You avoid a litany of figures, facts, and blueprints.</b></p>	
<p><b>15 You are passionate about your organization and its program.</b></p>	
<p><b>16 You spend a great deal of time during cultivation meetings listening and probing— at least 75% of the time.</b></p>	
<p><b>17 Although you may be bit nervous, you overcome your anxiety and are comfortable in asking a person to consider a gift.</b></p>	
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QUESTIONS	POINTS
<p><b>18</b> You spend the necessary time in cultivating probable donors, and find it is increasingly easy to get an appointment to move to a time when you can close the gift.</p>	
<p><b>19</b> You have many important gift proposals and contacts and you are successful in reaching successful closure.</p>	
<p><b>20</b> You maintain a close on-going relationship with your major probable donors.</p>	
<p><b>21</b> You are faithful in reminding your major donors throughout the year of how grateful you are for their gifts.</p>	
<p><b>22</b> You work within a carefully structured donor and probable donor system (<i>MovesManagement*</i>, for instance) and are faithful about working the system.</p> <p><i>*MovesManagement is a name owned and registered by the Institute of Charitable Giving.</i></p>	
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<p><b>TOTAL POINTS FOR ALL QUESTIONS</b></p>	

TOTAL POINTS	
96-110	You've got the touch!
81-95	You're doing well, but you could improve.
70-80	You need to work on your weakness.
69 and below	You should make an extensive effort to improve your skills

