

FORM FOR SUCCESS

For the year

Name of Organization:
Person Completing this Form:
This form is being filled out for year/time period from _____ (date) to _____ (date).
Our Fiscal Year: _____ (date) to _____ (date).

	#	%	\$	Benevon Formula	Met Formula? (Y/N)
Total money raised to date attributable to the Benevon Model (since attending Benevon 101)					
I. Point of Entry Events					
a. Total # of POEs your organization has had since last Ask Event				At least two/month	
b. Total # of Ambassadors who hosted and filled a POE with at least 10 people in last 12 months				minimum 20 Ambassadors	
c. Total # of actual POE guests between Ask Events				10/tour (20/month) minimum	
II. Follow-Up & Tracking					
a. # and % of guests who received Follow-Up Calls after POE (or received phone message)				100%	
b. Do you have a sustainable tracking system used by everyone in the process to track all donor contacts? Yes No					
III. Ask Event Guests					
Date of Ask Event included in this report: _____					
a. Total actual Ask Event attendees/expected number of guests				85% attend	
b. # and % of Ask Event guests who had attended prior POEs since the last Ask Event				Minimum 40% ripened fruit	
c. % of Point of Entry guests in the last 12 months who attend Ask Event				Minimum 40% conversion rate	
d. % of Ask Event guests are first-time attendees at the event				50%	
e. # and % of first-time Ask Event attendees who attended a Point of Entry in the last twelve months				80%	
IV. Ask Event Table Captains Total #: _____ Actual / _____ Expected					
a. # and % of Table Captains who served as Ambassadors in year prior to Ask Event, and brought at least ten guests to a POE				100%	
b. # of Table Captains who were staff members				2 maximum, excluding MYGSD	
V. Ask Event Results Excluding Leadership/Challenge Gift and Sponsorship					
a. Total # and % of guests who made a financial contribution at Ask Event				40-50%	
b. Of Ask Event donors, # and % who are first-time donors to the organization				50%	
c. Average gift from guests who attended POE since last Ask Event					
d. Average gift from guests who had not attended POE since last Ask Event					
e. Multiple-Year Giving Society Donors (\$1K/5K/10K x 5 or \$1K/10K/25K x 5) excluding leadership/challenge gift					
i. #, %, and total \$ raised from guests that pledged/gave newly at \$1,000 level					
ii. #, %, and total \$ raised from guests pledged/gave newly at \$5,000 level (if applicable)					
iii. #, %, and total \$ raised from guests that pledged/gave newly at \$10,000 level					
iv. #, %, and total \$ raised from guests that pledged/gave newly at \$25,000 level (if applicable)					
v. #, %, and total \$ raised from guests that pledged/gave newly at more than \$1,000 x 5 years level but not at one of your three official levels (e.g., \$2,000/year for five years)					
f. Total #/% \$ raised of new first-time Multiple-Year Giving Society Donors each year (excluding Leadership/Challenge gift) (total of e.i.-v. above)					
g. #/ \$ of Multiple-Year Giving Society Donors who increased or extended their pledge (new money only)					
h. Total \$ raised from non-Multiple-Year Giving Society donors in cash and pledges (excluding Leadership/Challenge Gift)					
i. SUBTOTAL OF ALL ASK EVENT \$ RAISED (EXCLUDING SPONSORSHIP OR LEADERSHIP/CHALLENGE GIFT) (sum of V. f.-h. above)				Total # of guests divided by two times \$1,000	
VI. Ask Event Sponsorship / Leadership/Challenge Gifts					
a. \$ amount of Ask Event sponsorship (not counted in V. above)					
b. \$ amount of Leadership/Challenge Gift(s) pledged or received related to Ask Event (not counted in V. above)				Increasing amount each year	
i. Number of new Multiple-Year Giving Society Donors who pledge towards your Leadership/Challenge Gift					
c. SUBTOTAL \$ AMOUNT OF SPONSORSHIP AND LEADERSHIP/CHALLENGE GIFTS (sum of VI. a. and b. above)					
VII. Total Ask Event Results including Leadership/Challenge Gift					
a. Sum of V.i. and VI.c.					
b. Number of new MYGS Donors (sum of V.f. and VI.b.i.) = x% of total Ask Event guests				10% of Ask Event attendees	

FORM FOR SUCCESS, continued

For the year _____

	#	%	\$	Benevon Formula	Met Formula? (Y/N)
VIII. Major Gifts / Capital / Endowment					
a. \$ amount of major gifts pledged or received (not counted in AE results)					
i. Number of these donors whose pledge counts towards Multiple-Year Giving Society (\$1k+x5)					
b. \$ amount of capital gifts pledged or received (not counted in AE results)					
c. \$ amount of endowment gifts or bequests pledged or received (not counted in AE results)					
d. Subtotal: Sum of VIII. a-c					
e. % of all new money raised is from non-Ask Event related activities				50% minimum in Year 4 and beyond	
IX. TOTAL \$ RAISED FROM USE OF BENEVON MODEL THIS YEAR (sum of VII.a. and VIII.d.)					
a. \$ and % increase in total dollars raised from individuals over last year				10% minimum	
X. Cumulative Multiple-Year Giving Society Donors					
a. # of Multiple-Year Giving Society Donors at the start of this reporting period					
b. # of Multiple-Year Giving Society Donors who have completed their five-year pledges or dropped out during this reporting period					
c. # of first-time Multiple-Year Giving Society Donors added during this reporting period (Sum of V.f. + VI.b.i. + VIII.a.i.)					
d. # of prior Multiple-Year Giving Society Donors who completed their five-year pledge and re-pledged for another five years					
e. Net # of Multiple-Year Giving Society Donors at end of reporting period					
XI. Cultivation (Second Ask Event and Beyond)					
a. # and % of Multiple-Year Giving Society Members who were Ambassadors and brought ten people to a POE in the last twelve months				Minimum of 20% MYGSD	
b. % of Multiple-Year Giving Society Donors who attend at least one Free Feel-Good Cultivation Event each year				50%	
c. # of in-person or phone cultivation contacts you have with each Multiple-Year Giving Society Donors each year				At least two	
d. # and % of current Multiple-Year Giving Society Donors who increased their pledge or added additional years				20%	
e. % of Multiple-Year Giving Society Donors who make their annual pledge payment				90% minimum	
f. % of Multiple-Year Giving Society Donors who renew their pledge at the same level or higher in or before the fifth year				50% minimum	
g. Master Cultivation Calendar being followed ____ Yes ____ No				yes	
XII. Team and Board					
a. Do you have a targeted measurable definition of sustainable funding you are aiming for? ____ Yes ____ No				yes	
b. Have you added at least one board champion each year? ____ Yes ____ No				yes	
c. # of non-staff team members added to team this year				At least three	
d. # of team members who left the team this year					
e. % of board members who give money to the organization				100%	
f. % of board members in the Multiple-Year Giving Society				50%	
g. Are all new staff and board leadership trained in the model as they come on board? ____ Yes ____ No				yes	
XIII. What else besides money did this process bring you?					
a. Increased board/volunteer passion and participation in the larger plan for sustainable funding? Please explain:					
b. Staff recommitted to the mission? Please explain:					
c. Increased community visibility? Please explain:					
d. Other, e.g., referrals, new clients, partnerships, new funders:					
XIV. Additional comments about the entire process?					