1. **Key numbers**

ASPECT	LAST YEAR	THIS YEAR
$ raised - paid		
$ raised - pledged		
Number of donors		
New donors		
Continuing donors		
$ spent on projects		
$ retained in savings or endowment		
Number of bequests		
ROI of fundraising events		
etc		

2. **Project list**
   - Buildings
   - Scholarships/Bursaries
   - Archives
   - Programs
   - Other

3. **Key people**
   - Staff
   - Board
   - Donors & other volunteers/advocates

4. **Training/Prof Development**
   - Staff
   - Board
   - Donors & other volunteers/advocates

5. **Case for Support**
   - Content development
   - Production
   - Promotion

6. **Fundraising Activities**
   a) Donor engagement
      a. Briefings (small groups)
      b. Thank you events
      c. Phone calls
      d. Special meetings (one to one)
      e. Special insight projects (feasibility study, donor focus groups)
      f. Annual report to donors
   b) Annual appeal
   c) Bequest program

     d) Events
- a. Alumni event integration
- b. Business breakfasts
- c. Anniversaries
- d. Golf day
- e. Gala Ball
- f. Other

     e) Capital campaign

     f) Other campaigns
- a. Scholarships
- b. Payments with school fees
- c. Workplace giving
- d. Intensive 'one day' campaigns
- e. Other

     g) Merchandising

     h) Sponsorship

     i) Grants

     j) Other income

7. Structural action
- Entities
- DGR funds
- Reporting relationships
- Accounts

8. Communication channels
- Post
- Web site
- E-mail
- App/Portal
- Social media
- Third party

9. Policy and procedure development

10. Compliance activity

11. Infrastructure
- Database
- Offices and equipment
- Staffing growth

12. Implementation Calendar

13. Annual Review