

Fundraising campaign/event/activity evaluation template

Activity name	
Project lead <i>Who was the main person project managing this?</i>	
Activity / Event overview: <i>Brief description of the project, dates and audiences.</i>	

Objectives reflections <i>What did you want this activity to achieve? Where they 'SMART'? Did you meet them?</i>		
Objective	Was it met?	Comments (particularly if only partly met)
	Yes / Partly / No	

KPIs <i>These should link to the objectives. How will you know if your objective was achieved? What are the measurements of success? What numbers did you aim to achieve compared to what you DID achieve? This is your benchmark against what you're trying achieve. Below are some common KPIs which you may wish to use.</i>		
Budget/Numbers KPIs	Marketing KPIs	Insight KPIs
Number of attendees / fundraisers / donors	Number of enquiries (from each source)	Supporter feedback
Number of supporters remitted income	Number of sign-ups (from each source)	Volunteer feedback
% of enquiries converted to supporters	Number of opt-ins for post-activity	Staff feedback
% of sign ups that remitted / hit min target	PR/traditional media stories/mentions	Photos submitted
Average gift (remove outliers)	Organic social media reach	Tags/mentions on social media
Average fundraised amount (remove outliers)	Paid social media reach	
% of supporters that didn't fundraise	Website hits	

FUNDRAISER

SARAH



This template has been created and is owned by Fundraiser Sarah Ltd. (Copyright) It is for use only by approved clients, contacts or /members of the Fundraiser Sarah community. It is not permitted to be shared, forwarded to other people/charities/organisations, recreated for profit or gain, or in any other way used other than as intended. Failure to understand or follow the terms of use for this resource, may result in further action being taken. Thank you for your understanding.

Fundraising campaign/event/activity evaluation template

SWOT analysis <i>Within this project, what were the strengths, weaknesses, opportunities and threats summarised</i>	Strengths	Weaknesses
	Opportunities	Threats

Top line net and gross income

Budget income	Budget expenditure	Actual gross income	Actual expenditure	Actual net income	ROI

Income trends

Look at your data and identify key trends or data points. Were there outliers (such as very large gifts/fundraised amounts) that meant you hit target – but when removing those average gifts were low? Was it sign up numbers that were down, or fundraised amounts? Where might you need to strengthen or make improvements in your marketing and/or stewardship to improve those figures?

FUNDRAISER

SARAH



This template has been created and is owned by Fundraiser Sarah Ltd. (Copyright) It is for use only by approved clients, contacts or /members of the Fundraiser Sarah community. It is not permitted to be shared, forwarded to other people/charities/organisations, recreated for profit or gain, or in any other way used other than as intended. Failure to understand or follow the terms of use for this resource, may result in further action being taken. Thank you for your understanding.

Fundraising campaign/event/activity evaluation template

<p>Feedback trends <i>Look through your attendee/participant, staff and volunteer feedback and identify any common or repeated comments or trends. What do these tell you? What can you learn from this and put into place for next time?</i></p>	
<p>Concerns & Contingencies <i>Unexpected things that happened on the day, or things that happened differently to the plan. What were the learnings from this? What would you do differently next time?</i></p>	
<p>Wins and successes <i>Things that happened in line with the plan, better than expected or not planned for but were positive coincidences. How could you plan for these things to happen in future?</i></p>	

<p>Key takeaways / things to implement or change or incorporate into planning for next time</p>	
<p>Key takeaway</p>	<p>Why/notes</p>

<p>Key documents <i>Link to original project plan, supporter survey, detailed data analysis and any other documents that will support this evaluation.</i></p>	
--	--

FUNDRAISER

SARAH



This template has been created and is owned by Fundraiser Sarah Ltd. (Copyright) It is for use only by approved clients, contacts or /members of the Fundraiser Sarah community. It is not permitted to be shared, forwarded to other people/charities/organisations, recreated for profit or gain, or in any other way used other than as intended. Failure to understand or follow the terms of use for this resource, may result in further action being taken. Thank you for your understanding.