

Sustainability Benchmarking Tool  
Multiple Revenue Stream Analysis

Agency Name:

Sustainability Strategic Planning Meeting Date:

REVENUE STREAMS	Yes, We Have This In Place	# of Months In Place	Total \$\$\$ Generated in Last 12 Months	% of Last 12 Months' Revenue	Yes, We Plan to Pursue This in the Next 6 months	Yes, We Would Like More Info
<b>SHORT TERM</b>						
--Cause-Related Marketing						
--Corporate Sponsors						
--Fee-for-service or Program Service						
--Founder's Circle/Board Giving						
--Fundraising Event(s)						
--Grants - Foundations						
--Grants - Civic Organizations						
--Grants - Corporate						
--In-Kind						
--Pledges						
--Product Development/Sales						
--Online Fundraising						
--Special Fundraising Campaigns						
<b>MIDDLE TERM</b>						
--Adopt/Sponsor an X (ex. Whale)						
--Earned Income						
--Grants - Federal						
--Grants - Local/State Government						
--Matching donations						
--Memberships & Recurring Revenue						
--Social Enterprise						
<b>LONG TERM</b>						
--Alumni Program						
--Bequests						
--Endowment						
--Federal/State & Tax Initiatives						
--Investments, Royalties, Asset Sales						
--Planned Giving						
--Rent						
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Checklist: Multiple Revenue Streams

NOTE: Can Be Mission-Related (tax-free) & Mission-Unrelated Revenue (taxed)

\$ Now	\$ Goal	Revenue Stream #	Type of Revenue Stream	Examples	990 Part VIII	Strategy		
						Short	Middle	Long
		1	Federated Campaigns	United Way	Line 1a		X	
			Membership A	See Membership B Lines 2a-f	Line 1b			
		2	Fundraising Events	Dinners/Dances, Door-to-door Sales of Merchandize, Concerts, Carnivals, Sporting Events (i.e., Golf Tournaments)	Line 1c	X		
			Contributed By Related Organizations	Transfer of Assets from Close Out or Merger	Line 1d			X
		3	Government Grants	Federal, State, County, City, Local	Line 1e		X	
		4	Other Contributions, Gifts, Grants	Foundation, Corporation Grants, Corporate Sponsors, Civic Organizations, Cause Marketing, Online Fundraising, Matching Grants & Fundraising, Pledges, Board Stretch Gifts	Line 1f	X		
		5	Program Service	Tuition, Ticket Sales to Concert or Museum, Royalties from Book, Registration Fees	Lines 2a-2f	X		
		6	Program-Related Investments	Scholarship Loans, Low Interest Loans to Charities, Victims of a Disaster	Lines 2a-2f		X	
		7	Unrelated Trade or Business Activities	Social Club that Charges for Use of Tennis Courts and Golf Course	Lines 2a-2f		X	
			Sales of Inventory Items	Hospitals and Colleges/Universities	Lines 2a-2f		X	
			Government Reimbursement	Medicare and Medicaid Payments	Lines 2a-2f		X	
		8	Fee for Service & Sponsorship	Payments for Medical Services by Patients and Their Guarantors, 3rd Party Subsidies/Scholarships, Social Enterprise, Consulting	Lines 2a-2f	X		
		9	Fees and Contracts - Government	Medical Clinic providing Vaccinations, Disabled Individual Job Training	Lines 2a-2f		X	
		10	Membership Dues B	Subscriptions to Publications, Newsletters, Free or Reduced-Rate Admissions, Use of Facilities, Discounts on Articles or Services That Members Can Buy	Lines 2a-2f	X		
		11	Investment Income	Assets, Endowments, Planned Giving (Bequests, Annuities)	Line 3			X
		11	Investment of Bond Proceeds	Assets, Endowments, Planned Giving (Bequests, Annuities)	Line 4			X
		12	Royalties	Licensing Ongoing Use of Its Property to Others (patents and trademarks)	Line 5			X
		13	Rent	Rental Income from Investment Property	Line 6a-d			X
		14	Sales of Assets (not inventory)	Donated Vehicle or Computer Hardware	Line 7	X		
			Established Net Gain for Fundraising Events	Donors receive Keychain with Organization's Logo: Total Donations - Expenses = Net Gain	Lines 8a-c			
		15	Gaming	Raffles, Lotteries, Bingo	Lines 8a-c	X		
			Sales of Assets (inventory)	Assets Purchased and Inventoried by Nonprofit	Lines 10a-c		X	
		16	Unrelated Business Income	Not mission-specific: Rent income from Personal Property	Lines 10a-c	X		

990 Form	Type of Revenue Stream	Examples
Line 1a	Federated Campaigns	United Way
Line 1b	Membership Contributions A	See Lines 2a-f
Line 1c	Fundraising Events	Dinners/Dances, Door-to-door Sales of Merchandise, Concerts, Carnivals, Sporting Events (i.e., Golf Tournaments)
Line 1d	Contributed By Related Organizations	NANO
Line 1e	Government Grants	Federal, State, County, City, Local
Line 1f	Other Contributions, Gifts, Grants	Foundation, Corporation Grants, Corporate Sponsors, Civic Organizations
Lines 2a-2f	Program Service	Tuition, Ticket Sales to Concert or Museum, Royalties from Book, Registration Fees
	Program-Related Investments	Scholarship Loans, Low Interest Loans to Charities, Victims of a Disaster
	Unrelated Trade or Business Activities	Social Club that Charges for Use of Tennis Courts and Golf Course
	Sales of Inventory Items	Hospitals and Colleges/Universities
	Government Reimbursement	Medicare and Medicaid Payments
	Fee for Service & Sponsorship	Payments for Medical Services by Patients and Their Guarantors
	Fees and Contracts - Government	Medical Clinic providing Vaccinations, Disabled Individual Job Training
	Membership Dues B	Subscriptions to Publications, Newsletters, Free or Reduced-Rate Admissions, Use of Facilities, Discounts on Articles or Services That Members Can Buy
Line 3	Investment Income	Endowments, Planned Giving (Bequests, Annuities)
Line 4	Investment of Bond Proceeds	Endowments, Planned Giving (Bequests, Annuities)
Line 5	Royalties	Licensing Ongoing Use of Its Property to Others (patents and trademarks)
Line 6a-d	Rent	Rental Income from Investment Property
Line 7	Sales of Assets (not inventory)	Donated Vehicle or Computer Hardware
Lines 8a-c	Established Net of Fundraising Events	Donors receive Keychain with Organization's Logo: Total Donations - Expenses = Net Gain
Lines 9a-c	Gaming	Raffles, Lotteries, Bingo
Lines 10a-c	Sales of Assets (inventory)	Assets Purchased and Inventoried by Nonprofit
	Unrelated Business Income	Not mission-specific: Rent income from Personal Property

## 2013 Comparative Analysis Case Study - State Associations of Nonprofits

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Revenue Type (Only Related or Exempt Function Revenue Included)													
2	State Association of Nonprofits	Career Services	Conference Revenue	Consulting	Contract Fees	Education/Developme	Product/Service Fees	Publications	Sponsorship	Other	Membership	Government Grants	Other	Total
3	Nonprofit Resource Board of Alabama	\$8,792	\$112,282	\$0	\$350	\$86,943	\$0	\$0	\$0	\$0	\$137,066	\$0	\$116,517	\$253,583
4	Alaska - The Foraker Group	\$0	\$0	\$0	\$0	\$0	\$1,804,044	\$0	\$0	\$0	\$0	\$499,367	\$1,357,383	\$1,856,750
5	Alliance of Arizona Nonprofits	\$0	\$298,256	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$97,592	\$0	\$131,670	\$229,262
6	Arkansas Coalition for Excellence	\$0	\$0	\$0	\$0	\$3,566	\$0	\$0	\$2,000	\$0	\$45,977	\$90,731	\$102,424	\$239,132
7	California Association of Nonprofits	\$4,796	\$0	\$0	\$0	\$0	\$3,663	\$0	\$0	\$0	\$383,196	\$0	\$100,000	\$483,196
8	Colorado Nonprofit Association	\$0	\$98,234	\$0	\$0	\$64,050	\$0	\$0	\$0	\$26,815	\$483,369	\$87,124	\$731,865	\$1,302,358
9	Delaware Alliance for Nonprofit Advancement	\$0	\$0	\$0	\$0	\$0	\$31,198	\$0	\$0	\$0	\$53,113	\$0	\$146,599	\$199,712
10	Nonprofit Center of Northeast Florida	\$0	\$0	\$0	\$0	\$23,781	\$0	\$0	\$0	\$0	\$202,333	\$0	\$249,023	\$451,356
11	Georgia Center for Nonprofits	\$631,437	\$114,773	\$492,511	\$0	\$207,134	\$0	\$0	\$0	\$20,909	\$295,364	\$0	\$1,431,025	\$1,726,389
12	Hawaii Alliance of Nonprofit Organizations	\$0	\$22,000	\$27,166	\$0	\$0	\$0	\$0	\$0	\$0	\$59,570	\$122,387	\$150,597	\$332,554
13	Idaho Nonprofit Center	\$0	\$0	\$0	\$0	\$61,354	\$0	\$0	\$0	\$0	\$52,085	\$0	\$190,237	\$242,322
14	Illinois - Donors Forum	\$0	\$0	\$26,118	\$0	\$536,085	\$33,563	\$65,766	\$0	\$3,006	\$1,267,255	\$31,147	\$867,960	\$2,166,362
15	Kansas - Mainstream	\$0	\$0	\$96,198	\$15,875	\$10,076	\$0	\$3,464	\$0	\$3,701	\$23,931	\$2,596	\$1,800	\$28,327
16	Louisiana Association of Nonprofit Organizations	\$0	\$0	\$0	\$107,853	\$0	\$26,475	\$4,862	\$0	\$26,298	\$154,532	\$0	\$771,569	\$926,101
17	Maine Association of Nonprofits	\$0	\$29,966	\$0	\$0	\$34,618	\$10,973	\$0	\$0	\$17,370	\$212,249	\$79,084	\$415,203	\$706,536
18	Maryland Association of Nonprofit Organizations	\$0	\$0	\$0	\$0	\$0	\$582,797	\$0	\$0	\$0	\$623,939	\$0	\$242,885	\$866,824
19	Massachusetts Nonprofit Network	\$0	\$46,506	\$0	\$0	\$0	\$0	\$0	\$38,915	\$0	\$64,982	\$0	\$107,501	\$172,483
20	Michigan Nonprofit Association	\$0	\$0	\$0	\$0	\$0	\$754,599	\$0	\$0	\$0	\$369,012	\$1,610,881	\$1,577,197	\$3,557,090
21	Minnesota Council of Nonprofits	\$0	\$249,862	\$33,108	\$0	\$345,266	\$0	\$0	\$185,595	\$273	\$597,176	\$0	\$904,710	\$1,501,886
22	Mississippi Center for Nonprofits	\$0	\$16,515	\$12,325	\$0	\$11,162	\$0	\$0	\$0	\$198	\$59,451	\$186,582	\$21,865	\$267,898
23	Montana Nonprofit Association	\$0	\$49,866	\$0	\$0	\$36,582	\$0	\$0	\$47,225	\$75,665	\$115,481	\$0	\$160,564	\$276,045
	Nebraska/Iowa - Nonprofit Association of													