

Development Program Audit

Our team of non-profit consultants brings a fresh perspective on fundraising and exposure efforts at your organization. We assess the strengths, challenges, and opportunities of your development or fundraising operation.

When conducting your Development Program Audit, we...

- Analyze Historic Fundraising Data;
- Using the Fundraising Fitness test, review and present fundraising trends for your organization over the last 60 months and provide strategic recommendations to enhance this revenue stream;
- Review your organization's donor pyramid;
- Review giving by constituency, source, and channel;
- Interview key stakeholders, including members of your Board of Directors, staff, volunteers, and previous donors;
- Review your organization's current strategic plan, if applicable, giving particular attention to the high-level objectives that relate to fundraising and complementary marketing and communications efforts;
- Review current annual operating plan for fundraising, marketing, and communications efforts;
- Review your organization's compliance with IRS and state regulations as it relates to charitable fundraising, and share industry-standard best practices with federal and state laws, such as HIPAA and FERPA if applicable;
- Review your current organizational chart, staff positions, and job duties, as well as strengths and weaknesses of the current staff;
- Review of current members of the Board of Directors, including strengths and weaknesses of the current board and a needs assessment for board recruitment;
- Review current written Case for Support or assist with the creation of one;
- Review of current database and the data held within and suggest modifications and/or enhancements;
- Review gift processing policies, procedures, metrics, and standards, and if these do not exist, provide a template for these policies;
- Review Stewardship and Donor recognition policies;
- Review Gift Acceptance Policy and if this does not exist, provide the template for this policy.

At the conclusion of the data gathering process, we provide a written report that...

- Highlights program strengths and opportunities;
- Provides recommendations regarding board member recruitment and governance issues;
- Shares strategies to enhance operational effectiveness.

Additional deliverables include...

- A fundraising forecast based on data and prospects
- Assistance in creating or revising your annual integrated fundraising and marketing and communications plans.

Investment - \$2,500.00

This comprehensive Development Program Audit includes two (2) 6-hour days on-site to perform interviews of key staff and leadership, review materials, and gather data. If preferred, a virtual process is available.

