

What is a Fund Development Audit?

A **fund development audit** is an organizations' commitment to evaluate, strengthen, and benchmark fundraising best practices. A focused assessment of the fund development function evaluates the strength and appropriateness of the case for support, assesses the knowledge and aptitude of development staff, determines the willingness and capability of donors, assesses the clarity of goals, objectives, and methodologies, identifies income/expense ratios and available resources, and provides recommendations for the most effective strategies to meet the organization's goals.

Conducting a fund development audit with Alexander|Carrillo Consulting, Inc. Creates an opportunity for free and open dialogue among key stakeholders. We can provide an objective and realistic view of your organization's fundraising potential to determine if a climate and culture exists to leverage your internal and external strengths and expand your fund development efforts. Ultimately, the findings and recommendations will assist your organization with strategic steps and tools to solicit financial support more effectively and efficiently from your target audiences.

Each fund development audit is customized to the specific needs of the organization; however, the typical audit will include the following:

- ✓ **Documents Review:** A thorough reading and examination of mission, vision, by-laws and other corporate documents; financial documents including budgets and reports; organizational structure and job descriptions; and fundraising documents such as the fund development plan, case statement, grant applications and other collateral material.
- ✓ **Constituent Input:** Surveys, interviews, and/or focus groups with key constituent groups such as donors, volunteers, staff and board members. Constituents confidentially share information such as how they prioritize their charitable giving; their impressions of the organization's leadership, case for support, and communications; the organization's brand and reputation, and much more. These interview serve to provide information to the organization, but also to build confidence, momentum and interest among constituents.
- ✓ **Benchmarking Research:** Survey of other comparable nonprofits to compare key metrics such as dollars raised, fundraising expenses, staffing patterns, and successful fundraising strategies.

When the audit is complete, your organization receives a comprehensive report with detailed analysis, key findings, and recommendations for improvement and growth.

Interested? Contact us for a free consultation and estimate: info@do-good-better.com

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