

Fundraising Day in Southern New England

April 12, 2013

The Audit: Analyzing your organization through your fundraiser eyes

Presented by Gayle L. Gifford, ACFRE

Topics:

- Overview
- Philanthropic landscape
- Components
- Data collection
- Analysis
- Post- audit

Presenter:



Author of [How to Make Your Board Dramatically More Effective, Starting Today](#), **Gayle L. Gifford, ACFRE**, helps nonprofit boards and staff become more strategic in achieving their ultimate goal: to make this world a better place.

Described as “*strategic, bright, insightful, fearless, and principled*,” Gayle is known for challenging conventions that stop nonprofits from finding practical solutions to the problems they face.

President of the New England-based consulting firm Cause & Effect Inc., Gayle’s expertise is governance, strategic and business planning, organization and fund development, and public engagement design. Gayle is one of fewer than 100 people who hold the advanced fundraising credential ACFRE.

Before starting Cause & Effect Inc. in 1996, Gayle served as Director of Development and Marketing/Deputy Director at Save The Bay, as Director of Development and Communications at Plan International USA, and as Director of Development at City Year RI.

Gayle has taught graduate courses in communications and organization development as adjunct faculty at Simmons College and Brown University. Gayle shares helpful advice and free tools on her website and blog, *The Butterfly Effect*, which you’ll find at www.ceffect.com. Follow her on Twitter @gaylegifford.

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What is a Whole Organization Fund Development Audit?

A comprehensive assessment of your organization and your fundraising program with a goal of strategic improvement.

Why conduct an audit?

- Starting a new position
- Launching or ramping up a new program (e.g. major gifts, endowment, planned giving)
- Preparing for a campaign
- Feeling stuck
- Just wanting a fresh look
- _____
- _____

Start with the right attitude

- Burning desire for improvement
- Burning desire for truth
- Strategic thinker

What's strategic thinking?

- Intent focused
- Systems perspective
- Intelligent opportunism
- Thinking in time
- Hypothesis driven

From: Dr. Jeanne M. Leidtke

The audit process

- External Scan
 - Benchmarking
 - Feedback
- Internal Scan
 - Data review
 - Feedback
- Whole Organization Analysis

Benchmarking

- Definition: Benchmarking is a way to evaluation yourself by comparing you against your peers.
- Ways to collect data:
 - Ask your peers
 - Review 990s and other data through Guidestar.org, The Foundation Center's 990 Finder or the National Center for Charitable Statistics
 - Review Annual Reports
 - _____
 - _____

Know Thyself

- Review the data that tells you a story about your own performance
- Look at trends
 - Falling? Growing? Where? Why?
 - 3 year, 5 year, 10 year
 - What's useful? What's trustworthy?
- Types of data to review, e.g.
 - Donor longevity
 - Long term donor value
 - Donor profiles
 - Donor acquisition and attrition
 - New and returning donors
 - Donors who have permanently dropped out
 - Increases or decreases in giving
 - Impact of solicitation types
 - Donor and gift stratification by gift range
 - Geography or other demographics
 - Info particular to your organization
 - _____
 - _____
 - _____

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Get an outside perspective

- Interview key informants: donors – current and lapsed, prospects, peers, institutional funders, trendsetters, clients, board members, leadership, program staff
- Things to ask about:
 - Reputation & brand
 - Strength of your issues
 - Impression of your programs
 - Strength of your culture of philanthropy
 - Donor experience
 - Strength of case for support
 - Location among your peers
 - Funding opportunities
 - _____
 - _____

Know your market

- Size of giving universe
- Abundance or lack thereof of institutional funders
- “Competition”
- Technology of fundraising
- _____
- _____

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How to analyze:

Look at all parts of your organizations through these lenses:

- Assets
- Opportunities
- Missing pieces
- Concerns/ work arounds

What to analyze:

- Mission and program
- Case for Support
- Culture of Philanthropy
- Constituents
- Fundraising Program
 - Cultivation/prospecting
 - Acquisition by types
 - Retention programs
 - Upgrade programs
 - Donors by type
- Stewardship Program
- Brand Identity
- Communications
- Fund development capacity & infrastructure
 - Planning
 - Research
 - Evaluation
 - Staffing
 - Technology
 - Donor management
 - Budget
- Legal & regulatory

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Pulling it all together

- Executive Summary
- Mission & Programming
- Profile of Fund Development
- Summary Giving Profile
- Comparison with Peers
- Assets – Opportunities – Missing Pieces – Work Arounds/Concerns
- Detailed data
- Findings from external research

What's next?

- Develop opportunities
- Strengthen weaknesses
- Mothball or abandon unpromising directions
- Lobby for needed investments
- Develop your fund development plan
- _____
- _____

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A few resources for you

- Guidestar.org
- The Foundation Center 990 Finder
<http://foundationcenter.org/findfunders/990finder/>
- National Center for Charitable Statistics <http://nccs.urban.org/>
- American Fact Finder factfinder2.census.gov/
- Cause & Effect online Toolbox www.ceffect.com/tools-for-change
- “Strategic Thinking: A Discussion Paper” <http://tinyurl.com/cc5trd8>
- *Fundraising Analytics*. Joshua Birkholtz
- There are lots of resources online at your disposal.