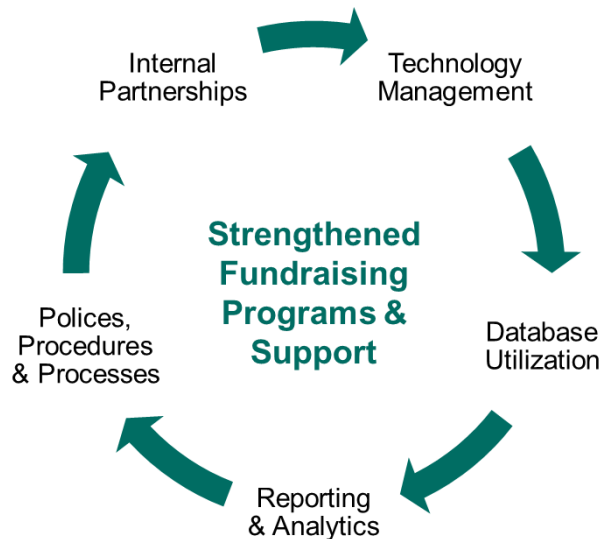




Fundraising Operations Assessment

A focused internal review of organizational fundraising operations that will highlight competencies, opportunities for higher efficiencies and elevate ways to maximize staff resources and database utilization



Together, with a core team of key staff (including database users), your Alford team will focus on **five key assessment factors**:

1. **Database management**: Gift entry, pledge management and stewardship efforts; constituent management and tracking; maintenance and overall database utilization; and possible training opportunities
2. **Reporting and Analytics**: All monthly, weekly and daily reports and dashboards both internal and external for all annual giving channels, special campaigns, and donor-facing material and reports
3. **Internal Partnerships**: Human Resources, IT and Finance as each area relates to fundraising
4. **Technology Management**: Online giving, wealth searching, donor data, file sharing, email platforms and all other platforms or vendor management systems
5. **Policies, Procedures and Processes**: Review and/or creation of policies and standards with implementation plan and enforcement measures

Recommendations

This assessment will provide a comprehensive summary report with clear next steps and recommendations for enhancing, improving and/or prioritizing operations that will strengthen your fundraising programs. This includes but is not limited to major and planned giving, annual giving, corporate and foundation relations, events, prospect research, campaigns and revenue reporting, and projections.