## Consultant on Call **Development Audit Form**

Organization Name:			
Person Completing Form: Name and Title:			
Date of Submission:			
Planning and Case			
We have a completed, written Mission Statement.  Please attach	Yes _	No _	In process
We have a completed, written Vision Statement.  Please attach	Yes	No _	In process
We have an organizational strategic plan.	Yes _	No _	In process
We have a development planYesNoIn proc	ess		
We have a completed, written Case Statement.	Yes _	No _	In process
Infrastructure			
We have written, approved Gift Acceptance Policies.	Yes _	No _	In process
We have a Development Procedure Manual.	Yes _	No _	In process
We have 501(c) 3 or other tax-exempt status.	Yes _	No _	In process
We have met state registration requirements.	Yes _	No _	In process
We have fundraising softwareYesNo Type			
We have staff trained to use this software to its full capacity.	Yes _	No	Somewhat
We have sufficient, up to date hardware	Yes	No	
Staffing			
Number of people in development office:  Please attach staff organizational chart if available			
Number of staff with certification (CFRE, ACFRE, etc):			
Number of staff who are members of Association of Fundraising	Professional	s (AFP):	
Is the development office adequately staffed?	Yes	No	In process
Does the chief development person report directly to the CEO?		_ Yes	No
How many years development experience does the chief develop10 years or more6 to 9 years3 to 5 years	_		ess than 1 year

## Governance

Number on Board of Directors				
Do board members have a position description	?	Yes _	No	In process
Are there term limits in the position description	?		Ye	sNo
If so, are they adhered to?			Ye	sNo
Functioning Committees?  Please attach board organizational chart if available.	ailable	Yes	NoN	Not effective
The Board understands their governance role.		Yes _	No	_Some
The Board contributes financially.	100%	75%	50%	_25% or less
Do board members have a position description?  Are there term limits in the position description?  If so, are they adhered to?  Functioning Committees?  Please attach board organizational chart if available  The Board understands their governance role.  The Board contributes financially100  The Board is involved in fundraising.  There is an active Development Committee that included be  We use non board volunteers in fundraising  Donor Relations  What is considered by the organization to be a Major Gift?  We do special appeals/events for major donors.  We have giving clubs.  We have donor recognition events/programs.  We have volunteer recognition events/programs.  We have a prospect research program in place.  We have a donor cultivation program in place.  Gifts are acknowledged within24-48 hrs. of receipt		Yes _	No	_Some
There is an active Development Committee tha	t included board	d and non board	d members	
		Yes _	No	In process
We use non board volunteers in fundraising		Yes _	No	In process
<b>Donor Relations</b>				
What is considered by the organization to be a	Major Gift?	\$		
We do special appeals/events for major donors		Yes _	No	
We have giving clubs.		Yes _	No	
We have donor recognition events/programs.		Yes _	No	
We have volunteer recognition events/programs	s.	Yes _	No	
We have a prospect research program in place.		Yes _	No	
We have a donor cultivation program in place.	Yes _	No		
We have a website.  Please attach web address		Yes	No	
We publish the following: Annual F	Report	Brochures	_ Newsletter	:
Press Re	leases	Other		_

## **Fundraising Methods & Strategies**

Total Dollars Raised last year\$ \_\_\_\_\_

Funding Area	Group	Personal Visits	Phone	Mail	Events	Grants				
Annual: Approx	Annual: Approximate Total Raised \$									
	Corporate	\$	\$	\$	\$	\$				
	Individual	\$	\$	\$	\$	\$				
	Foundations	\$	\$	\$	\$	\$				
	Organizations	\$	\$	\$	\$	\$				
Capital: Appro-	ximate Total Raised	\$	I	l						
	Corporate	\$	\$	\$	\$	\$				
	Individual	\$	\$	\$	\$	\$				
	Foundations	\$	\$	\$	\$	\$				
	Organizations	\$	\$	\$	\$	\$				
Endowment: A <sub>1</sub>	pproximate Total Rai	ised \$	L	<u>I</u>						
	Corporate	\$	\$	\$	\$	\$				
	Individual	\$	\$	\$	\$	\$				
	Foundations	\$	\$	\$	\$	\$				
	Organizations	\$	\$	\$	\$	\$				
Other: Approxi	mate Total Raised \$	l .	I	l						
	Corporate	\$	\$	\$	\$	\$				
	Individual	\$	\$	\$	\$	\$				
	Foundations	\$	\$	\$	\$	\$				
	Organizations	\$	\$	\$	\$	\$				