

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. Yes No In process
Please attach

We have a completed, written Vision Statement. Yes No In process
Please attach

We have an organizational strategic plan. Yes No In process

We have a development plan. Yes No In process

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 software. Yes No 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 Professionals (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 development person have?
 10 years or more 6 to 9 years 3 to 5 years 1 to 2 years Less than 1 year

Fundraising Methods & Strategies

Total Dollars Raised last year\$ _____

Funding Area	Group	Personal Visits	Phone	Mail	Events	Grants
Annual: Approximate Total Raised \$						
	Corporate	\$	\$	\$	\$	\$
	Individual	\$	\$	\$	\$	\$
	Foundations	\$	\$	\$	\$	\$
	Organizations	\$	\$	\$	\$	\$
Capital: Approximate Total Raised \$						
	Corporate	\$	\$	\$	\$	\$
	Individual	\$	\$	\$	\$	\$
	Foundations	\$	\$	\$	\$	\$
	Organizations	\$	\$	\$	\$	\$
Endowment: Approximate Total Raised \$						
	Corporate	\$	\$	\$	\$	\$
	Individual	\$	\$	\$	\$	\$
	Foundations	\$	\$	\$	\$	\$
	Organizations	\$	\$	\$	\$	\$
Other: Approximate Total Raised \$						
	Corporate	\$	\$	\$	\$	\$
	Individual	\$	\$	\$	\$	\$
	Foundations	\$	\$	\$	\$	\$
	Organizations	\$	\$	\$	\$	\$