

The Fundraising Audit Checklist

Where are we now? Where do we want to be? How will we get there?

Conducting a fundraising audit can be an insightful exercise for any fundraiser. The results of the audit will give an overall picture of your organizational health and the environment in which you operate. Use this checklist - based on the research of renowned fundraising expert Dr. Adrian Sargeant - to guide you through the audit process!



Dr. Adrian Sargeant,
Bloomerang Chief Scientist

☐ Macro Components

Describe the factors that might impact our organization:

- Political Factors
- Economic Factors
- Socio/Cultural Factors
- Technological Factors

☐ Market Factors

Gather data in respect to the various donor markets your organization is addressing:

- Individuals
- Corporations
- Foundations

☐ Internal Environment

Scrutinize past fundraising performance to carefully appraise what has worked well in the past and what has not:

- Revenues generated, costs incurred and returns generated
- What success has your organization had in addressing discrete donor segments?
- Organizational Processes: A review of the processes that support fundraising
- Organizational Structure: Look at the manner in which the fundraising function is organized. Is it optimal?

☐ Competitive Analysis

Much can be learned from the activities of other organizations.

Decide which competitors you should analyze:

- Industry leaders
- Other NPOs serving the same cause
- NPOs of a similar size

Gather information:

- Financial performance
- Competitor objectives and ambitions
- Past, present and future strategies

☐ Potential Collaborators

Who can you partner with to the advantage of everyone?

☐ SWOT Analysis

- What are the strengths of the organization?
- What are its weaknesses?
- What are the main opportunities facing the organization?
- What are the major threats facing the organization?