

QUICK AND DIRTY AUDIT CHECKLIST

	Y	N	Needs Work	Don't Know or n/a	Structure or Culture?	Who is primarily responsible	By when	Comments/actions
BOARD								
Does the board understand why fundraising is important and are they supportive? <i>(i.e. will they make their own donation; help identify prospects; make time at Board meetings for fundraising; be involved in the "ask" process.)</i>								
Does the organization have a strategic plan in which fundraising has been identified as a priority?								
Is the board able to wait for the return on investment of a new fundraising program?								
Will your ED:								
• Promote and, if necessary, support the fundraising program to/with the board?								
• Work with the board on fundraising?								
• Work with the dedicated staff to develop the fundraising program?								
• Make her/his own donation?								
INVESTMENT								
Can your organization allocate resources or make an investment in:								
• A dedicated person to fundraising? (PT, full time or reallocation of resources)								
• Training and professional development for fundraising staff?								
• Training and education for the Board/senior volunteers								

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INFRASTRUCTURE								
• Can you capture names, addresses and giving history of donors?								
• Are you able to thank donors quickly, sincerely and often for their support?								
• Do you have financial controls and policies and practices in place?								
• Are you clear what you're raising money for?								
• Is it clear to the outside world what you're raising money for?								
PLANNING								
• Have you identified your strengths and areas that need improvement with respect to fundraising?								
• Have you identified which fundraising methods are appropriate for your organization?								
• Do you have a plan for implementing each method of fundraising you've decided to implement?								
• Have you developed a budget with realistic fundraising revenue and expenses for each method or activity?								