

# Advancement audits



**ADVANCEMENT**  
Associates

## *This service might be important to you...*

- if you can benefit from a fresh perspective of your advancement program.
- if you sense a need to improve the quality of your organization's performance.
- if you want to provide clear direction for your development staff.
- if you want to make some changes in your advancement program, but need more information to help you define and carry out those changes.

**Building relationships.** Advancing your mission.

# Advancement audits

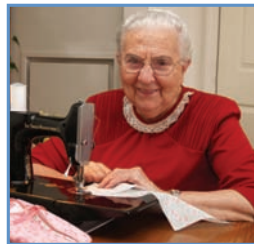
Advancement Associates, Inc. (AAI) conducts three types of audits—the development audit, the enrollment audit and the communications audit. A comprehensive analysis of your programs can provide you with a powerful management tool.



A **development audit** examines the adequacy of planning to clarify mission, priorities and funding needs; the case to be made for attracting support; the appeals made to contributors; the growth potential of special events; planned giving and other elements. In an **enrollment audit** AAI examines enrollment goals, the use of marketing principles, prospect segmentation, the visitation program, proactive retention, the application process and financial assistance. A **communications audit** focuses on the in-house systems of interaction and the various ways that the organization connects with its stakeholders.



In audits we use firsthand observation and reading, questionnaires, extensive interviews with people inside the organization and external constituents, and benchmarking with similar organizations of high quality.



## A CASE STUDY

Becky Drumm, AAI Principal, conducted a development audit for Landis Homes (Lititz, Pennsylvania), an agency of Lancaster Mennonite Conference to provide service for senior adults. Among Becky's findings was that benevolent care—special funding for residents who exhaust their financial resources—is the most meaningful and best understood reason for monetary support of Landis Homes.

Linford Good, the vice president of planning and marketing, says that Becky's study affirmed their using more organizational resources for fundraising. In particular, Landis Homes intends to expand fundraising efforts for the endowment program and the benevolent fund.

*Photos courtesy of AAI clients*

### Consulting in

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Enrollment



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