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Carrying out a Development audit

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Hello!

Rachel Hadley-Leonard

- Background in education & marketing
- Teacher & Senior Leader– Maintained & Independent Schools
- Marketing in industry – John Lewis, AbA etc.
- Marketing & Development in schools – inc. Marketing Manager, Head of Marketing, Alumni Relations Manager, Development Director
- Independent Schools' Development & Marketing Consultant

Currently:

- Immediate Past Chair of Admissions, Marketing & Communications in Independent Schools (AMCIS)
- Judge for Times Educational Supplement Independent Schools Awards
- Judge for global InspirED Brilliance Marketing & Fundraising Awards
- Contributor to All Party Parliamentary Group for Independent Education
- Independent Schools' Development, Marketing & Admissions Consultant





What is an audit ?

‘An **audit** is a systematic and independent examination of books, accounts, statutory records, documents and vouchers of an organization to ascertain how far the financial statements as well as non-financial disclosures present a true and fair view of the concern’ Wiki

Or, put more simply.....





A Development audit

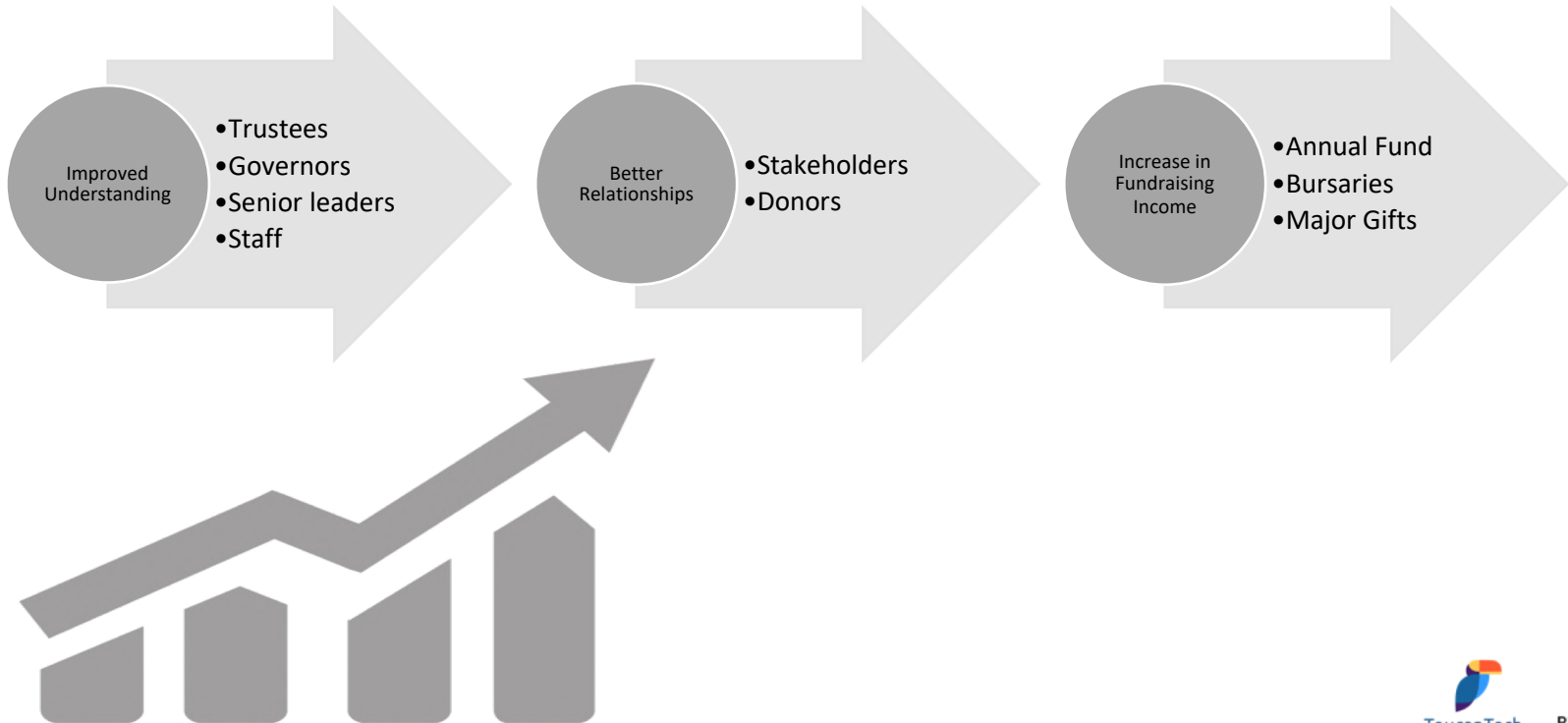
**Why?
What?
How?
When?
And then?**

A person in a dark suit and striped tie is holding a large, semi-transparent hexagonal sign with the word "Audit" in white. The sign is part of a larger graphic overlay featuring several other hexagons containing icons: a bar chart with an upward arrow, a group of three people, a magnifying glass, a document with a ribbon, and a pie chart.

Why carry out a Development audit?

- New in role
- Static office
- Donor fatigue/static or declining income
- Decline in volunteer numbers
- Pressure from the Board
- Raising the bar!

What will we achieve?





When shall we begin?

- Internal or external?
- Winter, Spring, Summer or Autumn?
- How long will it take?



What should we be asking?

1. What is our school ethos?
2. What are our Development goals? (fundraising/friendraising)
3. Are our goals realistic? Have we carried out a feasibility study and if not, should we?
4. How do we communicate our goals (Case for Support)?
5. How do we know what our stakeholders think?
6. Who is on board?
7. Who is on *the Board*? And is it effective?
8. Are we reaching our goals, financial and otherwise?
9. How do we capture and use data?



Where should we start and What should we focus on?

- Strategy (aligned with SDP)
- Case for Support
- Target setting & goals
- Stakeholder engagement
- Communications
- The Development Board
- CRM Database/software
- Website presence/activity/content/usability
- Literature - digital and hard copy inc. printing
- HR - Team Objectives and Key Performance Indicators
- Budget & ROI
- Integration with Marketing & Admissions



What should we do next?

Acting on the Findings

A catalyst for change

'Quick fixes'

- Create stakeholder focus group
- Website improvements

'This year fixes'

- Improved communications & literature
- New CRM database

'Longer term fixes – Years 1 to 3'

- Increase in human resource

No budget?



In House



Away Day



**Shop around
between
consultants**

What will we achieve?

IF YOU REALLY LOOK CLOSELY
MOST OVERNIGHT SUCCESSES
TOOK A LONG TIME.

- Steve Jobs -

**THANK
YOU**

Questions?



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About ToucanTech

ToucanTech is an easy, affordable and beautiful fundraising CRM and website software to manage your supporter records, email newsletters, online payments, events, mentoring, careers and more!



Any questions?

Please contact Amy – amy@toucantech.com
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