



**Kaplan
Strategic Partnerships**

Development Audits

FUNDRAISER

With over 20 years of development experience, David has done it all – annual campaigns, major gifts, grant writing, events, and more.

STORYTELLER

Storytelling is the key to any organization's success. David has been responsible for guiding how multiple organizations have successfully told their story over a variety of mediums.

LEADER

From departments responsible for raising millions to serving as the Executive Director of a national nonprofit to sitting on multiple charitable and civic boards, David is a proven leader with a growth mindset.

LET'S START A CONVERSATION TODAY

Contact us today to start a conversation and see how we can help you achieve your goals and meet your mission!

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It has been an extraordinary few months; we've all faced challenges we never imagined. As the philanthropic landscape shifted, your organization has been working tirelessly to meet these new challenges.

Now, as you prepare for an uncertain 2021, you need to determine what's working, what isn't, and where can you or should shift your focus to continue to meet your mission?

An independent Development Department Audit is essential to answering the key questions you're trying to answer..

A Development Department Audit with Kaplan Strategic Partnerships is an objective assessment of your nonprofit's current fundraising programs and systems. Our assessment will identify both strengths

and areas for improvement and will review all aspects of your program, including donor communications, cultivation, stewardship, and use of your donor management system.

We'll work with your team to provide a full assessment, identify areas of improvement, and suggested adjustments to your program to help you achieve your mission.

Our Development Audit Will Cover

- **General Organizational:** Legal structure, organizational structure, and strategic planning.
- **Fundraising Systems and Procedures:** CRM, case for support, gift acceptance policies, gift acknowledgment policies, historical performance, and diversity of funding streams.
- **Your Board's Role in Fundraising:** Board expectations, performance, and development committee.
- **The Role of Staff:** Development department structure and functions, professional development, and the executive director's (or CEO's) role in fundraising.
- **Cultivation and Stewardship:** Moves management, donor recognition, cultivation and stewardship plans, and donor relations and retention.
- **Donor Communications:** Communications plan, newsletters, website, and social media.

What Sets Us Apart

For more than 20 years, David has specialized in parachuting into new organizations and communities and hit the ground running with a primary focus on cultural competency. His proven ability to quickly understand the needs, values, and culture of an organization and the community it serves, and then turn that knowledge into action, has resulted in organizational growth and success.

David has scaled organizations amid natural disasters, leading them through systemic change, and assessed and restructured development programs quickly and efficiently under tight deadlines.

He's done all of this as a mission-driven leader grounded in empathy and equity – working tirelessly to tap into customer and client needs. His focus on innovative approaches has positioned organizations to succeed - from new and innovative development programs to strategic growth and programmatic adjustments.