



SourceGroup

Strategy + Development + Training = Results

Fundraising Review Program

Evaluate and Build your Fundraising Capacity

All Fundraising programs should be consistently evaluated and updated to be sure they meet the needs of the charity and continue to attract the attention and support of donors and prospective donors.

SourceGroup has assisted charities for over 30 years to build their fundraising capacity to achieve their funding goals. We have the experience and expertise to help build your success.

The SourceGroup Fundraising Review step-by-step process will give you a positive perspective of what can work for your organization to create funding opportunities:

Step 1: SourceGroup initial working meeting with your fundraising Team of staff & volunteers.

Step 2: SourceGroup review of:

- your fundraising history from your records and your database
- your current donor relations, recognition, and communications
- your current fundraising plans

Step 3: Preparation of the SourceGroup written report on an individual program basis showing where you are now and a route map of how to achieve your goals, objectives and priorities on time and on budget, including:

- Individual donors
- Major Gifts
- Planned Giving
- Membership
- Government
- Corporations
- Foundations
- Special Events & Sponsorship
- Your special projects and enterprises

Step 4: SourceGroup working meeting with Board, staff and volunteers to present our written report to make your fundraising a successful TEAM effort that identifies opportunities and ideas ***that make fundraising fun.***

The **SourceGroup Fundraising Review** can be accomplished in a short period of time and will position your organization for planning the future. It is affordable, readily fundable and will create benefits that exceed your investment in time and money.

Note: SourceGroup will need to have access to certain confidential records from you. These will be reviewed in your office with you and the information kept in the **strictest confidence**.