

Fundraising Health Check

Why consider a Fundraising Health Check?

For many schools, a Fundraising Health Check is the best starting point when thinking about strengthening development. It provides an impartial, expert appraisal of your school's current fundraising and engagement activities.

Schools we work with tell us the Health Check helps them to:

- Gain an independent view of what's working well and where improvements can be made
- Identify which fundraising activities to prioritise and which may be less effective
- Create a clear roadmap for growing income from parents, alumni, and other supporters
- Boost confidence and morale within the fundraising and development team
- Build a stronger sense of shared responsibility for fundraising across staff and governors
- Develop more compelling cases for support and stronger funding applications
- Strengthen relationships with donors, alumni, and families
- Increase understanding and buy-in from senior leadership and governors
- Empower staff and volunteers outside the development office to play a positive role

A supportive process

We know some schools can feel apprehensive about opening up their fundraising for review. Please be assured that all feedback is provided in a constructive and encouraging way. The process is designed to be supportive and practical – helping your team feel more confident and better equipped to deliver results.

How can you be involved?

Your input and involvement in the fundraising audit will make all the difference. Our starting point is to review your documents, website and fundraising data. The more information you can give us (both verbally and in writing) the better. Below is a checklist of information which will help us complete the audit.

Information about your school

You may not have all of the documents listed below. But anything you can provide us will help:

Please tick (as appropriate)	Yes	Not available	Comments
Governance and Strategy			
Copy of the school's fundraising or development strategy (if available)			
Details of who leads on fundraising/development (staff role, responsibilities, reporting lines)			
Existence of a fundraising or development committee (e.g. governors/trustees, parents, or alumni)			
Existence of a foundation, PTA/friends association, or alumni association and their role in fundraising			
Fundraising Programmes			
Details of any Annual Fund (participation rates, recent totals)			
Information on major gifts, bursary, capital, or endowment campaigns (past or present)			

Any legacy giving programme (planned giving, legacy society)			
Examples of donor stewardship (events, reports, recognition, societies)			
Summary of fundraising events and their performance			
Data & Systems			
What CRM/database is used (e.g. Raiser's Edge, ToucanTech, ThankQ, Excel, none)			
Approximate size of parent, alumni, and community databases			
Quality of available data (e.g. % with current emails, phone numbers, addresses)			
GDPR compliance approach and data management practices			
Examples of donor and alumni communications (letters, newsletters, campaigns, emails)			
Engagement & Community			
Alumni relations activity (e.g. reunions, careers mentoring, publications)			

Talking to you

A key part of the Fundraising Health Check is speaking directly with you and your colleagues. These conversations allow us to gain a **deeper understanding of your school's culture, priorities, and fundraising approach**, beyond what can be gleaned from documents alone.

During the introductory call and follow-up interviews, we'll explore areas such as:

1. Fundraising Strategy & Targets

- What fundraising goals have you set for this year?
- How are targets determined and monitored?
- Are there particular areas that are performing well, or where growth is needed?

2. Relationships & Engagement

- How strong are your relationships with parents, alumni, and other supporters?
- How do supporters perceive the school and its communications?
- What donor or alumni engagement activities currently exist, and how effective are they?

3. Culture & Capacity

- How embedded is a culture of philanthropy across staff, volunteers, and governors?
- Who is involved in fundraising, and how empowered do staff feel to contribute?
- Are there committees, PTAs, or foundation boards supporting fundraising activities?

4. Data & Tools

- How do you capture, manage, and use supporter data?
- Are your CRM systems, mailing lists, and reporting processes effective?
- How is GDPR compliance integrated into your fundraising activities?

5. Communications & Stewardship

- How effective are your website, annual reports, impact statements, and other donor-facing materials?
- Are newsletters, event invitations, and appeal communications helping to engage supporters?

6. Challenges & Opportunities

- What are the biggest obstacles currently affecting fundraising performance?
- Where do you see opportunities for growth or improvement?
- How can internal processes, partnerships, or communications be strengthened to

maximise fundraising outcomes?

All discussions are conducted in a supportive, collaborative way. The aim is to identify strengths, highlight opportunities, and give your school practical recommendations – not to criticise. The conversations provide context for our audit findings, helping us deliver a tailored, actionable roadmap for your fundraising strategy.

What Happens Once the Health Check is Complete?

The Health Check is designed to give you a clear picture of your fundraising strengths, opportunities, and practical next steps.

If you would like support with implementing recommendations, we can help in a variety of ways, including:

- Developing or updating your fundraising strategy
- Creating a case for support or campaign materials
- Recruiting a fundraiser or development staff member
- Conducting prospect research, writing funding applications, or supporting fundraising appeals and campaigns

Whether or not you choose to engage us further, the Health Check is designed to be actionable and high value, giving your school clarity and a roadmap to grow fundraising income and strengthen supporter engagement.

Our clients often tell us that the insights and guidance from a fundraising audit pay for themselves many times over, and provide a strong foundation for sustainable fundraising growth.

We are delighted you have chosen to work with us. Thank you.