

# Fundraising Alignment Audit

*Before donors give, they need to know who you are.*

A brand perception and alignment review that turns recognition into giving.

## Who it's for

Foundations and charities with more than one name on the door: sister foundations, chapters, sites or merged entities. Especially valuable before a capital campaign, a merger or a new strategic plan.

## Signs it's time

- **Donors give once and don't come back.** Retention is slipping, and no one can say why.
- **Your story changes depending on who tells it.** Board, staff and volunteers each pitch a different cause.
- **You're spending more to raise less.** Your cost to raise a dollar keeps creeping up.
- **Your biggest ask is coming.** A capital campaign built on an untested brand starts from behind.

## How it works

- 1 **Collect.** An inventory of identity, guidelines and channels across every entity.
- 2 **Listen.** Stakeholder, donor, staff and community interviews and surveys to assess genuine perception.
- 3 **Assess.** Brand performance gaps, measured against past fundraising results and future goals.

## What you receive

- A brand audit report and summary of findings
- A clear philanthropic value proposition
- A prioritized, phased roadmap
- A findings presentation to leadership and board

## Built on The Pivot Methodology<sup>©</sup>

Our framework reads the brand the way a donor experiences it.

### Clarity

Alignment and unique value

### Empathy

Audience, position and story

### Efficiency

Capacity, process and results

### PROVEN IN PRACTICE

For a regional Ontario health system and its four hospital foundations, the audit showed how brand confusion was misdirecting gifts. It delivered a roadmap toward a unified brand and collaborative fundraising.

### Single organization

6 to 8 days · from \$9,000

### Multi-entity system

12 to 15 days · from \$18,000