



A Financial Model Assessment Shows You How to Effectively Raise Money

It happens all the time. A nonprofit leader wants to expand her services to meet growing demand, or is frustrated with a stalled fundraising effort, or sees that a key revenue source is drying up, or doesn't know where to diversify her fundraising efforts.

CASE STUDIES

To learn more about what a financial model assessment does for Social Velocity clients, read the [IHS Hawaii](#) and [Waterloo Counseling](#) case studies.

She wants to raise more money, but doesn't know how.

A Financial Model Assessment can be game changing. It can give your nonprofit a deep understanding of where you need to focus your efforts and a clear road map for growing your financial sustainability.

When you receive Nell's completed Financial Model Assessment you hold in your hands an in-depth analysis of where you need to focus time and resources in order to increase funding. Often the Financial Model Assessment is the catalyst for big insights among board and staff and sets your nonprofit on a path toward fundamental changes to how you bring money in the door.

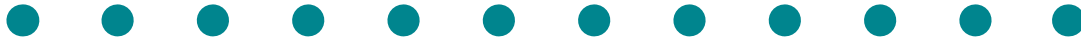
Nell's transformative Financial Model Assessment uncovers how all aspects of your organization contribute to or detract from money flowing through your doors, like this:

Strategy

Does your nonprofit have a long-term strategy that integrates money, programs and operations? Does your strategy help articulate the value your nonprofit provides in order to compel outsiders to invest?

TO LEARN MORE

To find out more about Social Velocity's Financial Model Assessment, or to schedule a free consultation, call (512) 694-7235 or email info@socialvelocity.net



Mission and Vision

Does your nonprofit have clear, compelling vision and mission statements? Does your vision paint a bold description of the social change you seek? Does your mission describe the day-to-day work towards that vision?

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Board and Staff Leadership

Is your board engaged and invested? Are they actively connecting the organization to people, resources and partnerships? Does your staff have the knowledge and experience necessary to make money flow? And are they structured and managed effectively?

Program Delivery and Impact

Is your nonprofit strategic about which programs to grow and which to cut? Do you measure the effect of your programs on clients? Are your programs financially viable, or are too many of your programs mission-rich, but cash-poor?

Marketing and Communications

Do you make a compelling case for your work and for support of it? Once you've made the case, are you using the right marketing channels (website, social media, events, email) to attract your target funders, volunteers, and advocates?

External Partnerships

Do you have the necessary external relationships to execute on your strategy? Are you constantly working to strengthen or grow the right partnerships in the right ways?

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Financial Model

Does your funding mix fit well with your mission and core competencies? Are there new revenue streams to pursue? Are there fundraising activities that are actually costly rather than profitable?

The Financial Model Assessment Process

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Here are the 7 steps Nell uses to create your nonprofit's Financial Model Assessment:

1. Interview Stakeholders

Nell conducts in-depth, one-on-one interviews with your executive director, revenue-generating staff, key board members, and specific funders and other external constituents to understand what is working and what isn't in your fundraising efforts.

2. Review Documents

Nell analyzes all organization documents, policies, procedures, financials, systems, and materials to understand your internal and external processes for raising money.

3. Analyze the Organization

Nell looks at 7 elements of your nonprofit's structure to determine how well they contribute to your fundraising effectiveness, including:

Strategy
Mission and Vision
Board and Staff Leadership
Program Delivery and Impact
Marketing and Communications
External Partnerships
Financial Model

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4. Uncover Revenue Streams

Nell looks at all current and potential revenue streams to uncover opportunities for increases, including, but not limited to:

Individual donors
Foundation grants
Corporate giving
Government
Earned income
Events



Nell Edgington
President, Social Velocity

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5. Review Fundraising Infrastructure

Nell looks at all aspects of your nonprofit's back-end functionality for raising money, including donor database, materials, systems, technology, marketing, and training in order to uncover areas for growth.

6. Provide a Roadmap to Grow Revenue

Nell creates a 20-30 page detailed analysis with recommended actions for increasing your revenue streams.

7. Lead a Change Discussion

Nell presents the assessment and recommendations at an in-person meeting of your staff and board and leads an engaging discussion about how to grow your financial model.

ABOUT SOCIAL VELOCITY

Social Velocity is a management consulting firm that helps nonprofits grow their programs, bring more money in the door, and use resources more effectively. The nonprofits Nell leaves behind are more strategic, sustainable, effective and above all, create more social change.