

Financial Model Assessment

ATTRACT ABUNDANT MONEY TO ACHIEVE YOUR GOALS

It happens all the time in nonprofit organizations. You want to expand services to meet growing demand, or are frustrated with a stalled fundraising effort, or see that a key revenue source is drying up, or don't know where to diversify your money-raising efforts.

You want to raise more money, but don't know how

Financial sustainability is the holy grail of the nonprofit sector. It occurs when a nonprofit attracts and effectively uses enough and the right kinds

of money necessary to achieve its long-term outcome goals.

A Financial Model Assessment gets you there.

It is game changing. When you receive Nell's completed Financial Model Assessment, you hold in your hands an in-depth analysis of how to increase funding. A 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 each aspect of your organization can increase money flowing to you, 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?

MISSION & VISION – Does your nonprofit have clear, compelling vision & 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?

BOARD & 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 & 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 & 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 alliances to execute on your strategy? Are you constantly working to strengthen or grow the right partnerships in the right ways?

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?



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The Financial Model Assessment Process

Here are the 7 steps Nell uses to create your nonprofit's Financial Model Assessment, which takes approximately 4 months:

1 INTERVIEW STAKEHOLDERS

Nell conducts in-depth, one-on-one interviews with your executive director, revenue-generating staff, key board members, funders and other external constituents to understand what is working and what isn't in your money-raising 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 6 elements of your nonprofit to determine how well they contribute to your fundraising effectiveness, including:

- Strategy
- Mission & Vision
- Board & Staff Leadership
- Program Delivery & Impact
- Marketing & Communications
- External Partnerships

4 ANALYZE FINANCIAL MODEL

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

- Individual donors
- Foundation grants
- Corporate giving
- Government
- Earned income
- Events

5 REVIEW MONEY-RAISING 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 FINANCIAL SUSTAINABILITY

Nell creates a 20-30 page detailed analysis with recommended actions for increasing the sustainable money flowing through your doors.

7 LEAD A CHANGE DISCUSSION

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

About Nell

Nell Edgington, President of Social Velocity, helps nonprofit and philanthropic leaders become more strategic, financially savvy and confident at creating social change. You can read my [client case studies](#) or learn about the [consulting services](#) I offer.



Want to Learn More?

If you are ready to talk about how I could help your organization do and be more, [Apply for a Free Consultation.](#)

