



Donor Relations and Fundraising Services

Does your organization want to diversify your funding and generate more unrestricted dollars? Do you want or need a development department? Partner with Wipfli and you will remain the face of your organization while we take care of the planning and behind-the-scenes fundraising implementation.

The people you serve in your communities depend on you to be there. Having a strong donor-relation strategy can improve the sustainability of your organization. It is harder than ever to impact the community when you rely on erratic federal and state funding, so organizations are finding ways to generate their own funds.

With your staff resources already spread thin, partner with us to be your development department. We'll be there every step of the way to create and implement a plan tailored to suit your needs to develop additional unrestricted dollars. With Wipfli's compliance experts on your team, you'll be able to fundraise AND stay in compliance with your grants.

Are you ready to grow your unrestricted dollars? Learn more or get started online at www.wipfli.com/fundraising.

Wipfli's Donor Relations and Fundraising Services:

- Annual development plan creation and implementation
- Development and fundraising policies and procedures
- Tailored, segmented messaging and acknowledgement
- Board, volunteer, and staff training
- Donor-related social media
- Foundation grant research
- Donor software evaluation
- Database management, which can include:
 - Donation entries
 - Identification of potential donors and sponsors and strategies for ways to meet them
 - Tracking of donors through the cultivation cycle
 - Report creation and pulling
 - Wealth screening



“Wipfli is more than just a software provider; they really understand nonprofit organizations. We wanted the guidance, nationwide presence, and grant-funded expertise that they offer.”

CFO, Wipfli Nonprofit Client

Donor System Review

Is your organization focused on generating new donor funds? If so, do you have a fundraising and donor management system that works well for your needs? Or perhaps your organization doesn't utilize a specific system for managing donors and donations? Make the decision today to have a Donor System Review by Wipfli's grant-funded and nonprofit experts. This review offers your organization an analysis and action plan to address gaps in your donor system. Wipfli's Donor System Review can:

Answer questions

- What are your current system capabilities and processes for donor management?
- How do these systems and processes compare to industry best practices?
- How do your current donor management system and processes work with your current accounting system and process?
- Is your current hosting platform right for you? What environment (cloud or on-premise) is best for your system?
- Are you tracking what you want to track?
- Is your system getting you the information you need? Reporting?
- Is there functionality you aren't yet using?

Provide recommendations

- Opportunities to improve your current system and processes
- Software changes
- Training and future needs

Uncover gaps in your donor system and create a plan to address them with a Wipfli Donor System Review. Email gfpbd@wipfli.com to learn more or get started.