

LEVRIDGE



RESOURCES

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704.366.6680

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September 2018 Newsletter



It's the Most Wonderful (?) Time of the Year: *"All that counts happens in September"*

The second quarter of the nonprofit fiscal year, for most nonprofits, October through December, is the most important quarter for impacting the total fiscal year's performance.

In second quarter, you can firm up **Prospective Donor Cultivation** for asks in 2019 ; Target and close out your **End of Year annual campaigns**; mark the half-way point of your **Annual Development Plan**; re-do projections for **Cash Flow**; and plan **Program Adjustments** for 2019 based on YTD impact metrics.

September is the priority month for:

- Cleaning up Donor Database (Need help with that? Call us! We have expert help to leverage your resources to get this done! *)
- Developing major gifts prospect lists for cultivation calls and site visit invitations. (We can work through your donor data to turn information into calls and appointments!)

- Studying your programming schedule for October through December, to see if adjustments or additions need to be made to meet your impact and outcome milestones. (We help you determine most meaningful and significant program measurements).
- Preparing your revenue cash flow projections every month during second quarter rather than quarterly, if quarterly is your usual practice. Monthly cash flow projections vs. actuals are especially important for the Staff Leadership team and the Board of Directors to be following closely and acting upon appropriately during fiscal year, 2nd quarter. (We provide advice on the criteria upon which to base your projections).
- Address any needed cost reductions before December. To have meaningful financial impact, don't wait until third or fourth quarter: decisions need to be made in September and taken soon in order to take full measure of your expenses and make any needed adjustments. (we can help you analyze your current operating budget and YTD effectiveness and suggest budget changes to address current variances or prevent further budget shortfalls).
- Staffing decisions and filling vacancies need to be in progress now because often December and January are hard months to get selection teams together and to get attention from qualified candidates. (Need help forming selection committees and setting hiring criteria? We have processes for that!)

What we're up to currently:

- Conducting nonprofit business model assessments to identify stability and risk factors
- Developing a performance management process including annual CEO evaluation
- Designing and facilitating strategic growth planning with Boards of Directors
- Facilitating Board formation and 2019 planning sessions
- Consulting with Nonprofit leaders on our unique, well developed process for executive transition as they face significant leadership change
- Engaged with two Nonprofits as Interim CEO using our integrated transition, business assessment, and change management model for nonprofits
- Serving as an Interim Development Director
- Consulting Nonprofit Board of Directors on their annual plan for 2019

Need help getting organized and ready for year end appeals and donor cultivating and prospecting for major gifts in 2019?

*Call us to talk about **Katie Benston's** consulting expertise and hands on training and diagnostic help with your donor database, grants management, and grant writing.



Thank you for your Interest!

Meet us

Clients

STAY CONNECTED WITH US!

