

Nonprofit Revenue Operations Self-Audit Template

Rate your fundraising infrastructure across 8 operational dimensions

Instructions: Score each item 1-5. Be honest. This isn't a test — it's a diagnostic.

1. CRM Health

#	Criteria	Score (1-5)
1	Data entry standards documented and enforced	
2	Donor interactions logged within 24 hours	
3	Custom fields configured for your fundraising model	
4	Duplicate records under 5% of total file	
5	Staff trained and actually using the CRM daily	
Subtotal		/25

2. Gift Processing

#	Criteria	Score (1-5)
1	Online gifts processed same-day	
2	Acknowledgment letters sent within 48 hours	
3	Recurring gift processing automated	
4	Refunds and adjustments have a clear workflow	
5	Month-end reconciliation takes less than 2 hours	
Subtotal		/25

3. Reporting & Analytics

#	Criteria	Score (1-5)
1	Real-time revenue dashboard accessible to leadership	

2	Retention rates calculated and tracked quarterly	
3	Donor lifetime value calculated by segment	
4	Campaign ROI measured for every initiative	
5	Board receives standardized fundraising reports monthly	
Subtotal		/25

4. Donor Stewardship

#	Criteria	Score (1-5)
1	Welcome series for new donors (first 90 days)	
2	Annual stewardship calendar for major donors	
3	Impact reporting sent to all donors annually	
4	Lapsed donor reactivation campaigns running	
5	Upgrade pathways defined (annual to monthly to major)	
Subtotal		/25

5. Campaign Operations

#	Criteria	Score (1-5)
1	12-month campaign calendar published and resourced	
2	Campaign briefs written before execution begins	
3	A/B testing built into email and direct mail	
4	Post-campaign analysis completed within 2 weeks	
5	Multi-channel coordination (email, mail, social, phone)	
Subtotal		/25

6. Team Structure

#	Criteria	Score (1-5)
1	Job descriptions current and aligned to revenue goals	
2	Performance metrics defined for every fundraising role	

3	Professional development budget allocated	
4	Succession plan exists for key positions	
5	Workload distributed based on capacity, not tradition	
Subtotal		/25

7. Technology Stack

#	Criteria	Score (1-5)
1	CRM integrated with email marketing platform	
2	Online giving platform optimized for conversion	
3	Payment processing costs reviewed annually	
4	Automation handles repetitive manual tasks	
5	Data flows between systems without manual export/import	
Subtotal		/25

8. Financial Management

#	Criteria	Score (1-5)
1	Fundraising budget tied to revenue projections	
2	Cost-to-raise calculated by revenue stream	
3	Cash flow forecast updated monthly	
4	Restricted vs. unrestricted revenue tracked accurately	
5	Board-approved reserve policy in place	
Subtotal		/25

Your Total Score: _____ / 200

160-200: Optimized

Your operation is running well. Focus on AI augmentation and advanced analytics to push further.

120-159: Functional

Solid foundation with clear gaps. Targeted improvements will unlock significant revenue growth.

80-119: Developing

Major operational gaps are costing you revenue. Prioritize CRM health, reporting, and stewardship.

Below 80: Critical

Your fundraising infrastructure needs a rebuild. Start with the 90-Day Turnaround Checklist.

Get a professional operations audit

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