The Dreaded Development Audit
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You have just learned that your development leadership has retained the services of a consultant to come in and evaluate the entire advancement program. Does this mean it's time for you to update your resume? Well, actually yes but not because your job is on the line! In fact this can and should be the time to celebrate!

Let's first understand why your leadership is interested in having an outsider conduct a program evaluation. More often than not this is a sign that you will begin the planning stages for a multi-year campaign and the "front office" wants to make sure your infrastructure can support the goal that's being discussed. Sometimes an audit is ordered on the heels of a leadership transition so that the new kid on the block can obtain a quick "state of the union" to find out what they have gotten themselves into. On the other hand, an audit may be desirable if you are still keeping track of donations on 3x5 cards and you need help determining what sort of system to implement. But *rarely* is the audit related to personnel issues other than to determine if you have enough riders on the bus sitting in the right seats. Contrary to popular opinion, consultants are infrequently used as the Grim Reaper – your HR department normally handles that.

So why do I say that it is time to celebrate? Mostly because you may now have the ear of an external expert who (hopefully) will tell your leadership – possibly with more authority – precisely what you have been saying for years: We are overworked and underpaid! Unfortunately, most consultants cannot do much about the underpaid part. Of course they very likely will mention that, but money does not grow on trees. They may, however, urge rewriting of position descriptions to more accurately reflect the nature and complexity of your position, which could cause HR to reevaluate your salary grade.

But most assuredly the consultant better be able to address the overworked part. Consultants are good because they bring to the table new ideas and ways of doing things that can often reduce workload without spending a penny. I cannot tell you how often I get the reply, "Because we have always done it that way," in response to my question, "Why are you doing that?" A key component of any audit is a workflow analysis. A good consultant does not simply interview staff. They better roll up their sleeves and walk through key daily activities with an eye toward process improvement. Rarely will a consultant *add* work. Their mission is to make work go away!

Indeed, after the consultant leaves and writes up their report, changes to processes will likely begin. Now that could raise anxiety levels a little – especially if you are one of the ones who responded, "Because we have always done it that way."! But change is usually good and, as I said, often will make your life easier. So embrace change. But you also should be vocal if you believe the consultant did not fully grasp the process they suggested be changed. Remember that they are in your shop for a matter of just a few days. It is not possible for them to catch all the nuances. But do not fight change simply because it is change.

What can you do to prepare for an audit? Really not a whole lot, but preparations will vary depending on the function being audited. However, everyone should prepare by making their own personal list of grievances and “silly stuff” – functions that are being performed that just do not make sense. The more a consultant hears the same thing said by different people, the more they will realize that something is broken that needs fixing – or even eliminated. Everyone should also review their own position description if it has be 3+ years since it was last updated. You may also be asked to provide a copy of your resume to the consultant, so as mentioned at the outset, make sure that it is current as well. And a good consultant will want to review all of the policies, procedures, and protocol that are currently in place. So pull out copies of those that apply to your function for when the consultant requests them. And you will be doing the consultant a favor if you mark their copy up either because changes have occurred or to highlight “silly stuff.”

As a researcher, you will also want to gather departmental statistics. Number of constituents on your database; the last date a major screening was performed; the number of records screened; the number of those records that have been research verified; the number of those prospects that have been assigned; etc. You especially will want to comment on the quality and quantity of data in your database. Lack of data significantly hampers a researcher’s ability to do research! So if Admissions is not sharing complete parent and enrollment data; if student life/affairs is not capturing student interest, activities, and clubs; if you have poor amounts of employment information; let the consultant know.

You will also want to gather examples of the different profiles you prepare (most institutions have 3 different formats – full, medium, and event). You will also want to collect example management reports such as portfolio hygiene and prospect management analysis. Simply think about a month of your life and what you produce for fundraisers and management in that month, and have samples of those work products available.

Just remember that the consultant is coming in to help you and your organization. Be willing to share everything you question – but also everything you love and why. You do not want the consultant recommending the elimination of a function/process that you strongly believe adds value. But be prepared to offer a thorough explanation as to why that function is so important.

A good consultant is your partner – not a hatchet man. Look forward to their arrival and do all you can to make their job easier. I promise you they will remember and acknowledge your assistance!