



Overview of Development Services

We do more than show you where opportunity exists, we help you achieve it. Jones & Associates is committed to that very purpose as **a leader in providing accounting and bookkeeping services to nonprofit organizations.** Organizations that work with Jones & Associates are supported by a team of professional accountants who have seen it all. Because Jones & Associates has worked with a great number and variety of nonprofits, there are few financial challenges they don't know how to handle. No matter what your nonprofit finance department needs, Jones & Associates team of professionals are available to help get on the right track. We have helped establish effective internal controls which provide nonprofits the systems they need for sound financial management.

Now Jones & Associates introduces its Development and Fundraising Practice. If you're planning a fundraising campaign or crafting a new development strategy, Jones & Associates assesses your current fundraising capabilities and suggests new ways to boost your potential. Our assessments involve speaking to key supporters to ascertain areas of improvement and existing success. We conduct a thorough audit of your development and fundraising practices and provide a fully comprehensive, tailor-made strategy to enhance your development efforts. Finally, our service provides nonprofits the support they need during implementation, including providing board members, senior staff and development professionals with coaching support.

JONES & ASSOCIATES DEVELOPMENT SERVICES

Organizational Assessment

- After conducting a development & fundraising audit, J&A team members work with a nonprofit's executive team to clarify strategy, set priorities, structure effective meetings, and resolve roadblocks to effective decision-making. More broadly, J&A team members help determine whether the organizational structure, processes, capabilities and operating model need updating to more effectively implement a fundraising strategy. The approach involves:
 - **Talent:** Guide the nonprofit to craft an action plan to cultivate development talent.
 - **Executive Team Performance:** Assist in defining effective organizational leadership, clarify the executive team's role, and establish processes for productive and inclusive group interactions as it relates to development and fundraising.
 - **Aligning Strategy and implementation:** Help evaluate and revise, as needed, the fundraising strategy—the roadmap for how you organize and deploy people and resources to translate strategy into results.

Development Planning

- Nonprofits looking to improve their organization's fundraising strategy and create new streams of revenue benefit from recognizing the first step to ensuring success: Prepare a fundraising plan. This will create a solid foundation on which to build giving strategies.
- By preparing and implementing an effective fundraising plan, a nonprofit creates an environment focused on working towards goals. Plus, it helps the organization choose which aspects they need to work on while keeping them accountable with benchmarks throughout the process.

Scenario and Contingency Planning

- Scenario and contingency planning enables nonprofits to prepare for potential challenges or opportunities and to respond quickly and appropriately. Nonprofit leaders are asked to consider factors partially or entirely outside of the organization's control, how those factors might shift, and how the organization could respond.
- Scenario planning enables nonprofits to explore and prepare for hypothetical circumstances and environments (e.g., economic downturn vs. recovery, or government funding cuts vs. growth). Contingency planning is a form of scenario planning more focused on navigating worst-case scenarios (e.g., loss of primary funding, programmatic failure, adverse policy change).
- Scenario planning and contingency planning allow leaders to begin adjusting plans earlier, rather than waiting until a crisis is upon the organization. If an organization needs to reduce expenses, it can preemptively prioritize which costs and investments to protect and which ones to reduce. Scenario plans can help nonprofits act quickly to seize promising opportunities. Contingency plans can help nonprofits weather worst-case scenarios (e.g., significant funding cuts, sudden loss of leadership).

Development Coaching

- There is no doubt development professionals work with ever-increasing expectations in the face of growing organizational needs. Helping these professionals build the skills and strategies that allow them to exceed goals, demonstrate accountability, and leverage these outcomes to greater success is a primary goal for Jones & Associates. We will coach nonprofit professionals on a variety of topics, including: Board fundraising roles and expectations, Executive Director & Development Team planning and Fundraising strategy implementation techniques.

For more information and to speak with us about our Development Services please contact Jeremy Weinstein, Executive Vice President & Head of Development Practice at jweinstein@charityaccounting.com.



Jeremy Weinstein is the Executive Vice President & Head of Development Practice. Jeremy has spent more than 20 years in development and fundraising. Before joining Jones & Associates, Jeremy lead all of KCRW's development efforts and created a strategy that increased the development revenue by more than 400 percent during his four year tenure with the organization. In addition to his role on the Senior Leadership Team, Jeremy was the chief liaison to the board of directors. Prior to coming to Los Angeles, he developed his own consulting practice and worked

under the Bloomberg Administration for the Fund for Public Schools at the New York City Department of Education. Jeremy is an accomplished executive level strategic development professional with expertise in development planning, large grant and major gift solicitation, donor and institutional stewardship, and board advancement for nonprofit organizations. To date he has successfully secured and managed more than \$160 million in private and government funding. Jeremy's expertise is grounded in finely focused strategic planning and implementation of requests for philanthropic support and donor cultivation. Through his professional and personal community involvement activities in Los Angeles, New York City and nationwide, he has built strong relationships in public and private sectors. He graduated from Lafayette College and received a master's in Nonprofit Management from New School University.