audits &
assessments
with AH's consulting experts

This brochure highlights some of the audit and assessment work AH has done for our client partners. Contact us to discuss your organization's needs and how we can help.

AH

ASSOCIATION
HEADQUARTERS

advace your organization to greatnesss.

financial
health check-up

A Financial Health Check-up involves a historical ratio analysis versus industry benchmarks, review of current financial policies, processes and procedures, as well as an evaluation of the organization's current financial statement format and design.

Review of your current financial processes and procedures by an external resource can provide opportunities to gain efficiencies within your finance function. A financial health check-up can help you understand where you stand today, and where you want to be in the future, so that you can set a strategy for how best to achieve your financial goals.

A periodic review of your financial and operational reports can identify areas for improvement and assess the effectiveness of reporting objectives. This review can provide more meaningful information to management and your Board of Directors to assist in decision-making.

PRO TIP

Use financial ratios to provide a quick reference to determine how your association's finances compare with industry benchmarks.

operational assessments

An Operational Assessment is an effective way to identify your organization's strengths and weaknesses.

This is done through a comprehensive review of operations such as staffing, technology, procedures, etc. and by pinpointing areas for improvement. An operational assessment is also a good indicator of how well your organization is being run.

The assessment would include a review of current documentation such as org. charts, job descriptions, and current policies and procedures, and identify opportunities for improvement and develop recommendations. It would also include staff and volunteer leader interviews to gather insights, trends and feedback.

You can expect a report that includes best practices and recommendations, proposed changes to current procedures and processes, and a recommended staffing model (if applicable).

This assessment can assist with setting productivity and efficiency benchmarks for your association based on industry research from the ASAE Foundation's Association Operating Ratio Report.

	RELEASE MANAGER	PROJECT MANAGER	DEVELOPER	PROGRAM MANAGER
PRODUCT PLANNING	I	A	R	C
PRODUCT DEVELOPMENT	I	I	A	R
PRODUCT RELEASE	R	A	I	I

Use the RACI
(Responsible, Accountable, Consulted and Informed) **chart to define roles and responsibilities. It can be used to identify inefficiencies of organizational roles.**

human resources assessment

An HR Assessment is a comprehensive evaluation of the organization's HR function, its structure, systems and procedures.

An assessment identifies the relevant effectiveness (or lack thereof) of human resource management practices within an organization as well as measures compliance with ever-changing rules and regulations.

The assessment will cover:

- Compliance and Recordkeeping
- Hiring and Onboarding Practices
- Policies and Procedures
- Compensation and Benefits
- Performance Management and Termination

As assessment includes an extensive document review and data collection process as well as a series of interviews with staff

The final product of the assessment is a diagnosis document of which HR practices and policies are efficient and effective and which need improvement or are potentially causing exposure for your organization. The recommendations are summarized and put into an action plan which serves as a road map for short-term tactical improvements and longer-term strategic changes.

It is recommended that performing periodic human resource compliance assessments to analyze all aspects of your current HR practices will minimize potential liability.

critical areas of review

Management	Safety & security
Hiring	Discrimination & employee rights
New employees	Workers' compensation
Wages & hours	Employee separation
Benefits	Recordkeeping & other documentation
Employee relations	

business process review

A Business Process Review looks at your people, processes and technology with the goal of identifying opportunities for improvement.

Failure to regularly review your business processes and gather feedback from internal and external stakeholders can result in inefficiencies, lack of adequate investment in staff and technology and frustrations among staff, volunteers and members.

A business process review enables an organization to review current processes and then make improvements to make them more efficient and effective with less wasted effort and more time spent on valuable work.

The final report should deliver an understanding of how a process is currently performed, the technology/systems that support the process and the people involved.

A review should also help to highlight problem areas and opportunities for change. Put simply, what are you trying to do? How are you doing it? What does and doesn't work? How might it be done better?

Step 1	Step 2	Step 3	Step 4	Step 5
PLANNING	**PREPARATION**	**INTERVIEWS**	**FINDINGS**	**REDESIGN**
Confirm key processes	Review current process documents	Interview staff	Deliver process maps and summary	Redesign processes
Educate staff	Preliminary map process	Map and document current processes	Identify paint points, bottlenecks, gaps	Create user guides and graphics for new processes
Gather information	Formulate questions	Identify pain points, bottlenecks, gaps	Recommend improvements and next steps	Educate staff
	Develop interview schedules	Look for opportunities		Implement

industry relations market evaluation

An Industry Relations (IR) Market Evaluation is the process of evaluating an organization's non-dues revenue growth potential.

A market evaluation allows you to identify problematic areas that need improvement, so that an action plan can be developed to address and correct them. A good market evaluation helps nonprofits to gain a truly in-depth understanding of their industry and/or field and membership as it relates to maximizing commercial support for their annual events and other multi-channel integrated assets.

Having a strategy in place for how your organization plans to bring in non-dues revenue begins with understanding your market and knowing who and what your assets are. An assets inventory is an audit of all current and potential opportunities poised for monetization and the pricing strategies and benefits development that will resonate with the market and drive mutual value.

Although every IR Market Evaluation is custom and crafted unique to the needs of the organization, most IR Market Evaluations have six outcomes:

**① **
Assess current challenges and reasons why there is declining interest in commercial support.

**② **
Define value propositions and unique points of differentiation that help commercial supporters understand why the organization is a good investment of their time and financial resources.

**③ **
Perform an assets inventory across the organization and make recommendations for new assets that should be cultivated so new revenue streams can flourish.

**④ **
Ability to create meaningful and relevant sponsorship offerings on a more global scale, across the organization at large.

**⑤ **
Recommendations for how the organization can transform from transactional to relationship-based in their approach to securing sustainable non-dues revenue.

**⑥ **
Recommendations for how the organization can better deliver and execute on sponsor and exhibitor benefits to increase perceived value and satisfaction.

technology assessment

Smart investments in the right technology can make all the difference in your association growth. An assessment of your current technology can ensure you're using it intelligently.

A technology assessment means evaluating your current processes to determine your technology pain points and recommending technology solutions to help alleviate those issues.

A full assessment would include your entire business process environment, not just the tools you use. It allows you the opportunity to find holes in any policies and procedures and to make sure efforts are not being duplicated.

WHAT'S COVERED?

- AMS
- Website
- CMS
- Online Community
- LMS
- Event Management/ Registration
- Survey Tools
- Email Marketing
- Web/Tele Conferencing
- Project Management
- File Sharing
- Mobile Apps
- Social Media
- Board Management Tools
- Accounting Software
- Anything unique to your organization

The value of a technology assessment for your non-profit means not spending more on additional technology needs, and using what you have to its full capacity. Conducting research on what is trending can help align your organization with industry leaders.

According to the ASAE Foundation's Tech Success for Associations Study*:

51%
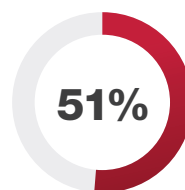
of respondents feel their association needs to "slightly expand their technology capabilities"

11%
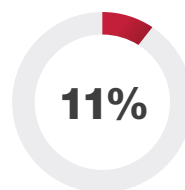
feel their association needs to "substantially expand"

A technology assessment can ensure that measures are taken so technology capabilities are exceeding members' expectations.

*foundation.asaecenter.org/research/technology/study

brand, membership, content & digital strategy

Our MarCom Department performs the following research and discovery audits that enable organizations to build, strengthen and embrace marketing philosophies that truly engage audiences.

MEMBERSHIP ANALYSIS AUDIT: JOURNEY & LIFECYCLE MAPPING

As the integral first step to the development of a larger membership retention and acquisition strategy, a facilitated deep dive into the membership, key stakeholders and overall constituency is performed. The membership analysis focuses on quantitative and qualitative research areas that enable us to learn how to best support increased retention and acquisition through a data-driven approach to larger marketing efforts. A robust membership analysis involves securing data from several sources to develop a true understanding of the membership landscape.

BRAND ASSESSMENT AUDIT

A brand assessment is an opportunity to evaluate the strength of your current brand, understand how your brand is perceived by your members and other stakeholders across geographies, and to reposition the brand, if necessary, to reflect shifts in your industry and/or organization. The brand assessment clarifies the core strategic elements of the brand, determines what makes the brand distinctive, identifies target audiences with psychographic information, and communicates opportunities to engage and activate internal and external stakeholders.

DATA COLLECTION AUDIT AND MANAGEMENT SYSTEMS INVENTORY

This audit reviews and assesses the organization's data collection ecosystem as part of mapping the overall membership journey and lifecycle based on the membership analysis previously mentioned. Based on this audit, we can provide recommendations for how the data collection process could be optimized to have a profound impact on marketing success.

WEBSITE CONTENT AND SEARCH ENGINE OPTIMIZATION (SEO) AUDIT

Search engine optimization (SEO) and content marketing are important, baseline components of every successful digital marketing strategy. Beyond making the website more visible, SEO and content marketing are valuable tools for brand awareness, building community, and positioning the organization as an authoritative and trustworthy expert in the field. To ensure the website meets requirements for high visibility on search engine results pages, a complete on-site and off-site SEO audit will be performed using elements common to all successful SEO strategies:

- Crawling & Indexing
- Keyword Research
- On-Page Optimization
- Anchor Text & External Linking
- Website Content Inventory
- Website Content Audit

GOOGLE ANALYTICS AUDIT AND CUSTOM CONFIGURATIONS

Analyzing incomplete or unreliable data that doesn't represent the real performance of your site can lead to poor decisions. In other words, a misconfigured Google Analytics corrupts and limits your data. By the same token, a properly configured Google Analytics is key to understanding your website visitors. To ensure your Analytics is running as it should and that the essential settings are correctly configured, a comprehensive GA implementation and data integrity review will be performed to apply the necessary fixes, filters, and improvements that your Analytics needs to provide reliable and meaningful user data.

CONTENT STRATEGY DEVELOPMENT (NON-WEBSITE)

Not all content is appropriate for all delivery channels. Developing a multi-faceted content strategy framework helps associations to reach the right mix of original versus aggregated content and how that content can be repurposed for audiences across various platforms and channels.

SOCIAL MEDIA CHANNEL AUDIT

A comprehensive social media audit and competitive landscape analysis focuses on the five interrelated elements common to all successful social media marketing, as compared to a side-by-side analysis of your top three competitors, include research on popular industry hashtags and social influencers:

- Social Listening Research and Monitoring
- Social Influence Content Creation and Curation
- Social Engagement Community Management
- Social Promotion Paid Advertising
- Social Measurement Metrics and Analysis

EMAIL MARKETING AND COMMUNICATIONS AUDIT

An audit of the association's email marketing and communications helps us understand how well the organization is currently communicating with its members and other audiences, and how well those messages are resonating. An email marketing audit will evaluate the following:

- Brand consistency
- Primary and secondary audience demographics
- Content and messaging
- Email campaign metrics and analytics
- Member vs. non-member email engagement
- Current email database and list management and segmentation
- Best practice for email platform authentication, opt-in/out forms/policies and other criteria

PR MEDIA AUDIT

A PR media audit reviews relevant industry material, including press releases/pitches, media reports, placements, etc. for the past year and among top competitors to compare messaging effectiveness and measure share-of-voice. The audit evaluates media and all additional stories that appeared beyond press release story themes, both initiated and responsive; relevant marketing activities that did, or should, generate media coverage; a comparative analysis of competition's messaging/media results; and Stop, Start, Continue recommendations as a blueprint for an effective comprehensive communications plan for the next year and expandable into multi-year implementation plans.

what every association needs.