

# Due Diligence Survey— UK & Europe





# Introduction

**Due Diligence** has been an established responsibility of Development Services for some time, yet our understanding and application of it is still in its nascent stage. Consequently, there has been no 'go to' resource that helps departments benchmark their practice. To help fill this gap, **BWF & PyroTalks CIC** teamed up to produce a sector-first Due Diligence Survey, with an initial focus on UK & Europe.

We hope the survey allows professionals to:

- Compare business processes
- Contrast risk priorities
- Benchmark trigger levels
- Measure funding
- Clarify average report times & volume
- Gain insight into standard Gift Acceptance Committees
- Convey confidence in their own departmental approach



# Scope & Methodology

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**The survey was issued in June 2021 for three weeks and received 104 complete responses. Questions were developed with support from the prospect development community.**

The target audience was any not-for-profit that has a due diligence procedure established to manage their ethics & reputational risk. This tends to include larger not-for-profits that accept major gifts from medical, environmental and international causes, to higher education, independent schools and arts & culture. The total collective income of respondents is around £1bn.

As this is the first time the survey has run, there is no ability for a year-on-year analysis, though this is expected to be achieved as the survey goes forward. It is also expected that the questions and format will develop over time.

Questions will be reviewed by their immediate results and, where useful, cross examination with other results in the survey will be noted.

# Key Findings

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There were a number of key findings identified through the course of this survey. Primarily, it highlighted that there is both work to be done in this space and opportunity for growth and discourse. Monetary, time, and process investment in due diligence will be pivotal to the success of our sector. We look forward to continuing to measure and discuss these key items.

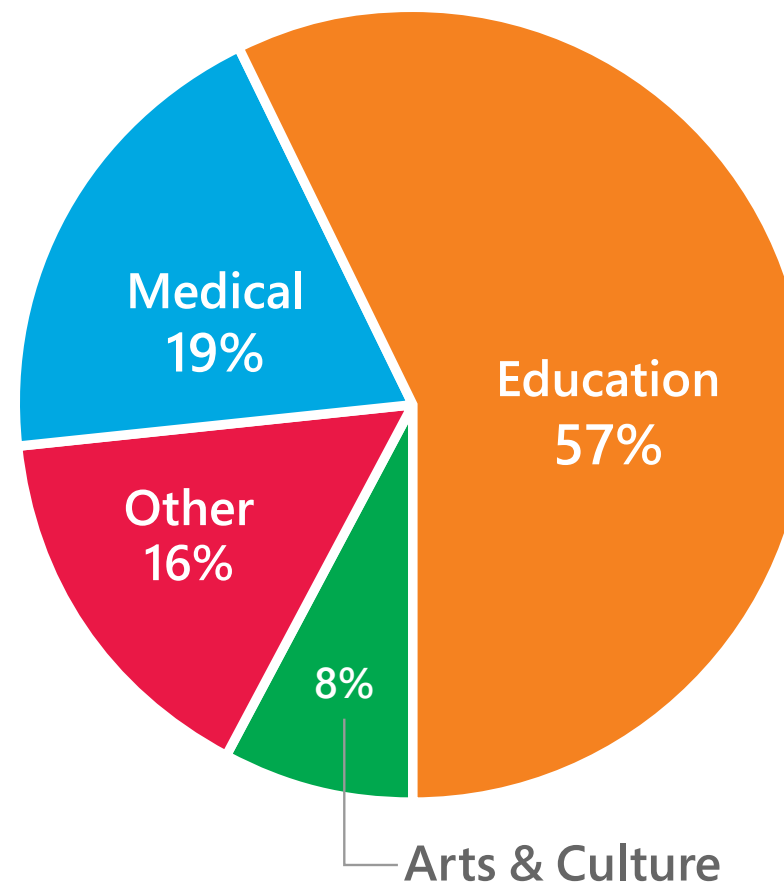
- 1. Divided on Key Issues**—There were a significant number of split results on key issues, like having a Gift Acceptance Committee and receiving training.
- 2. Inconsistent Deployment**—Regardless of size or income, there were major differences in approach in significant areas like report volume, report time, thresholds and authorizations.
- 3. Underfunded**—The sector feels underfunded and not always taken seriously.
- 4. Varied Confidence**—Respondents felt generally confident in their own process but not so much in their department's ability to handle a crisis.
- 5. Emerging Benchmarks**—Despite inconsistency and outliers, a general image of good practice is emerging. There are several strong findings in the study that offer useful initial benchmarks.



# Respondents

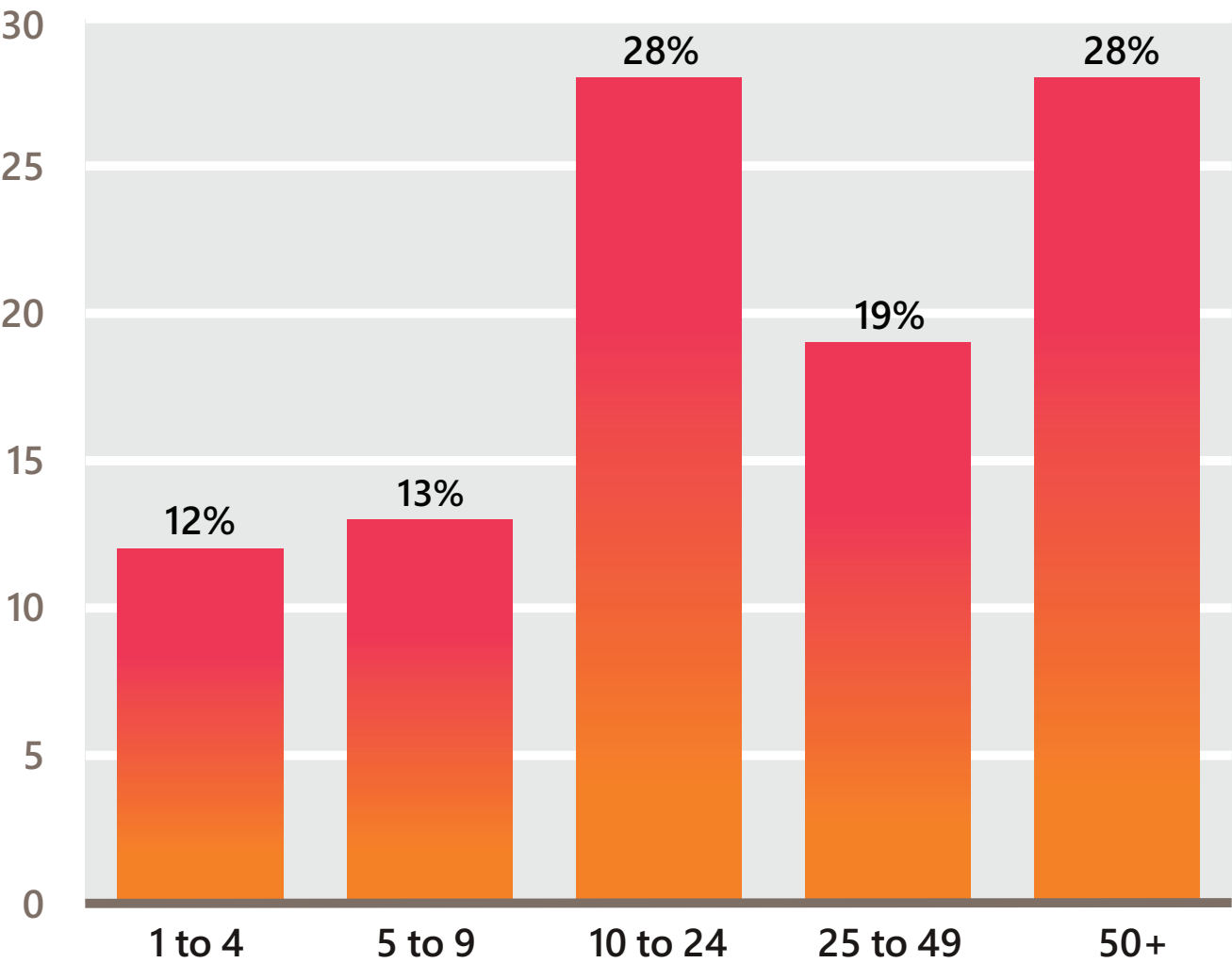
## BY SECTOR

The most responses came from the Education sector, which included predominately universities with some independent schools. Medical was the second largest, with Arts & Culture being the third. 'Other' included organisations like Overseas Aid, International Development, Disability, Environment, Public Service & Military, Sports Clubs, and Elderly.



**RESPONDENTS: BY DEPARTMENT SIZE FTE**

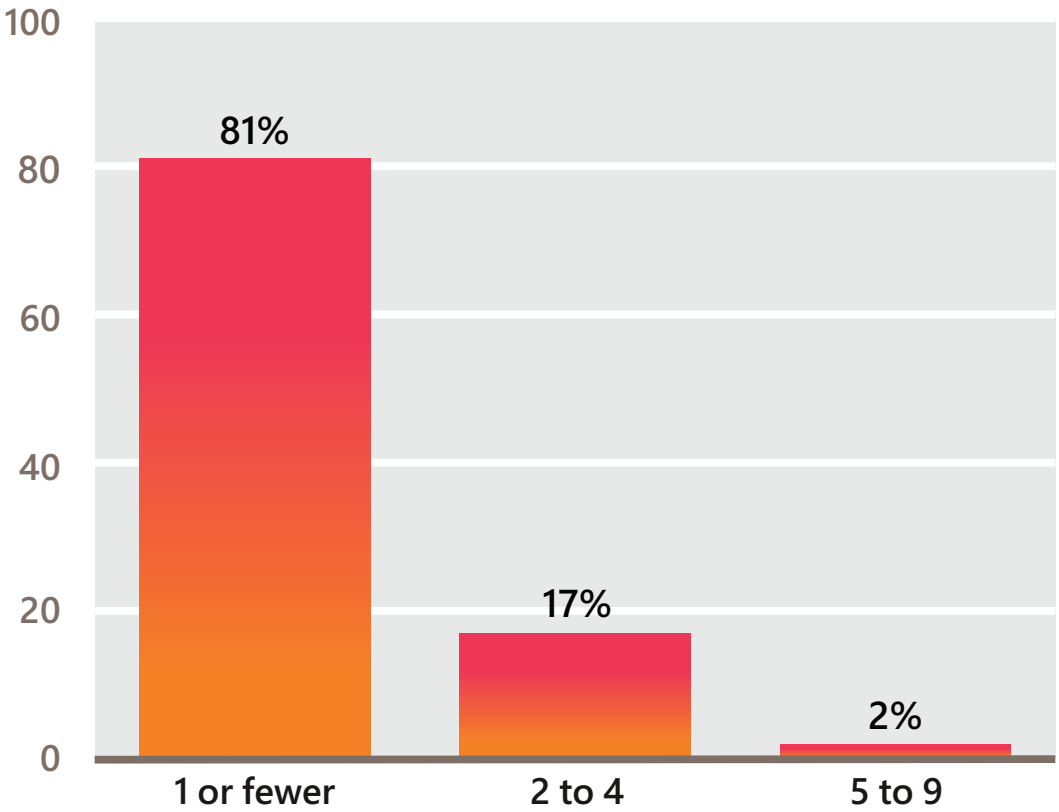
Respondents represented the full range of departments, illustrating that operations of all sizes conduct due diligence.





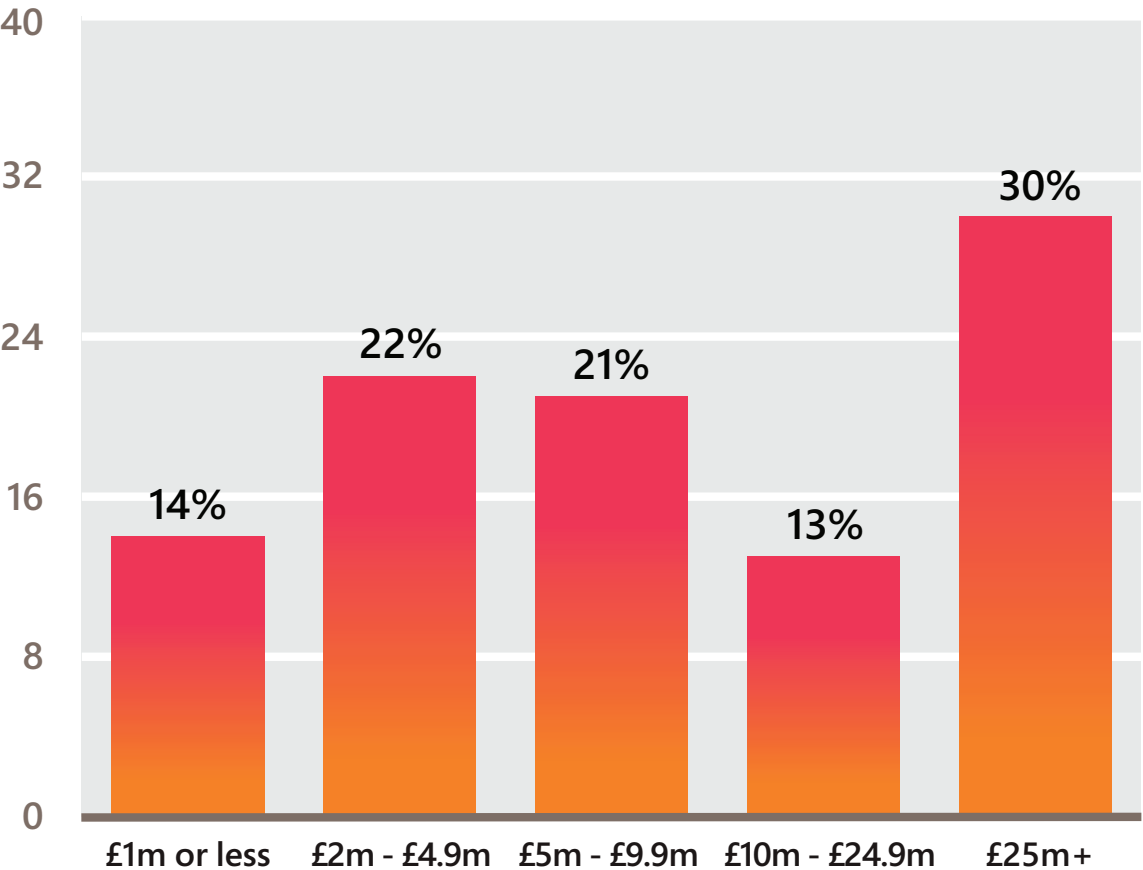
**RESPONDENTS: BY DUE DILIGENCE FTE**

This question explored Full-Time Equivalent staff dedicated to due diligence. 81 percent of organisations had 1 or fewer staff on due diligence. All income levels chose 1 or fewer as their predominant response, showing no significant correlation between higher income and higher due diligence staff levels.

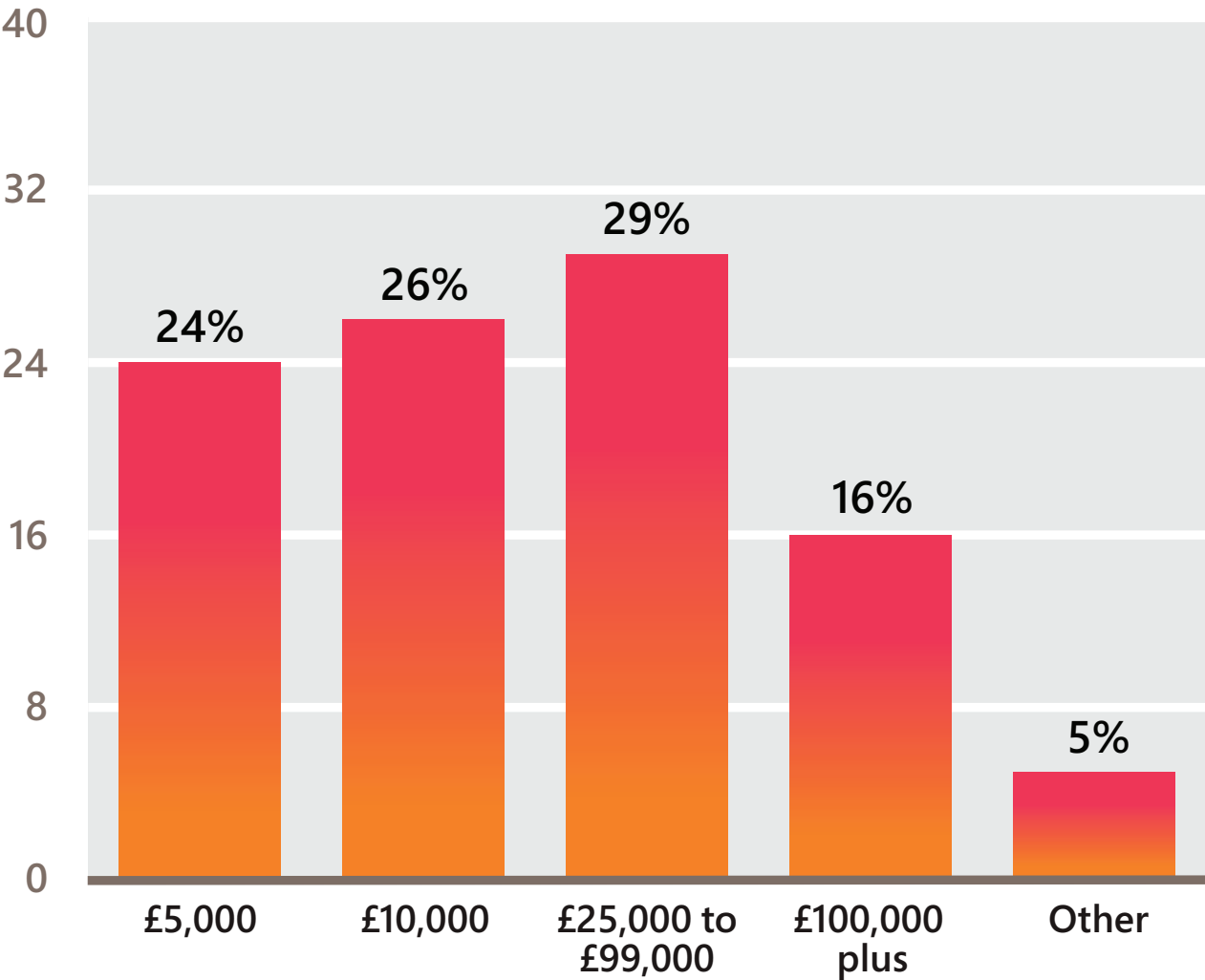


**RESPONDENTS: BY ANNUAL INCOME**

The largest number of respondents had an income of £25m+. However, all income levels were well represented, showing that due diligence is now an established activity regardless of income size.



**RESPONDENTS: BY MAJOR GIFT THRESHOLD**



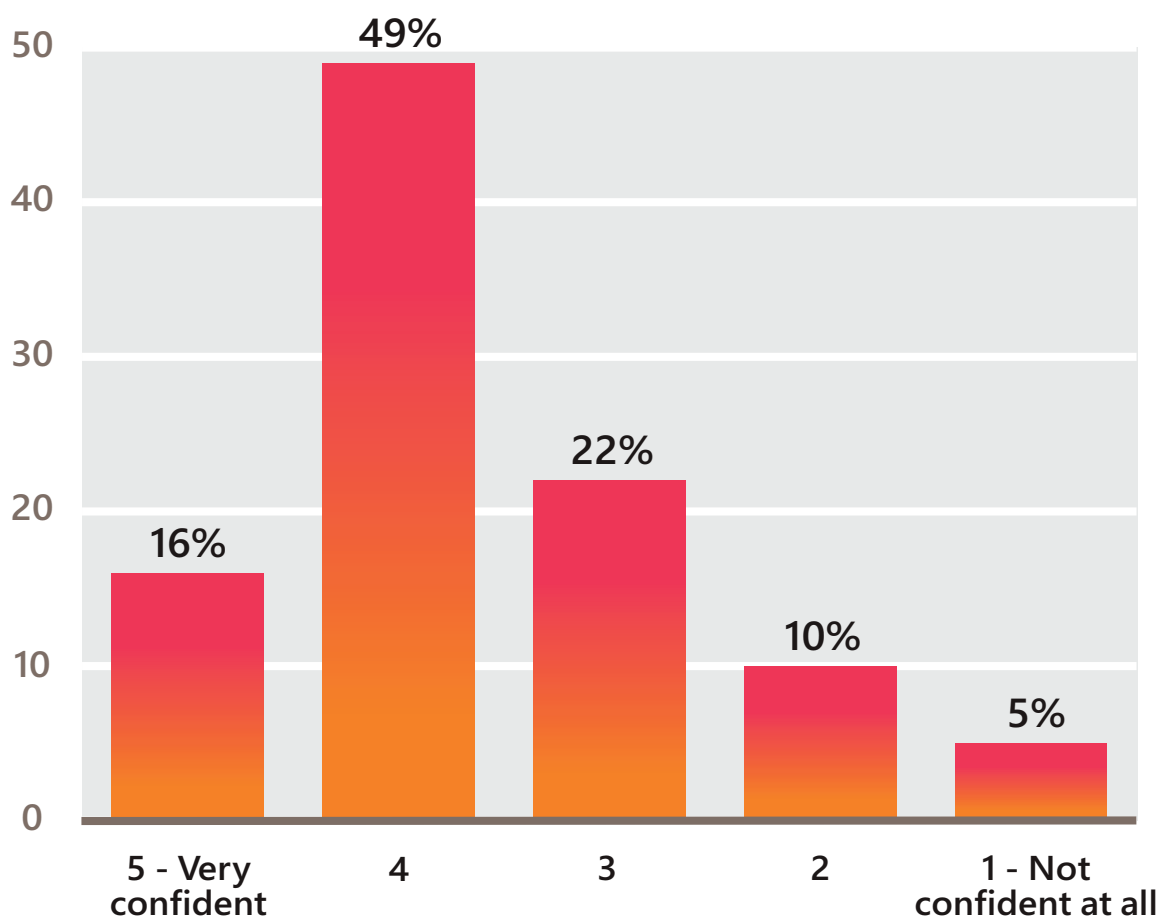
50 percent of respondents have their major gifts starting at or below £10,000, whereas 45 percent have their major gifts starting at £25,000 or above. 'Other' cited a mix of lower than £5,000 and higher than £100,000.



# Confidence

## SURVEY QUESTION #1

How confident are you that your due diligence process is sufficient to protect your organization’s reputation?



### Finding

65 percent of respondents felt confident in their due diligence process, with 35 percent saying they felt unsure to not confident.

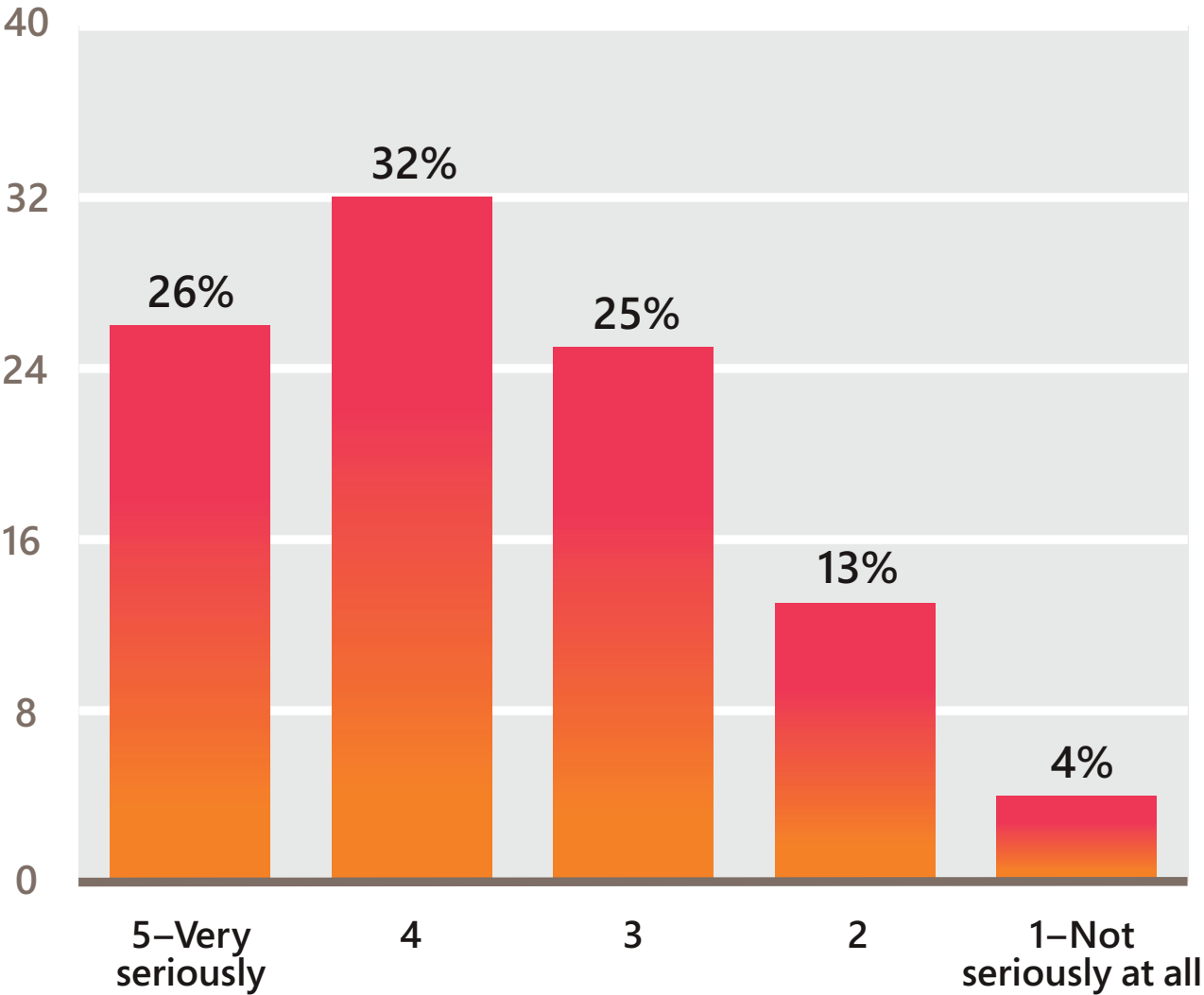
### Cross Examination

Contrasting these results with another question in the survey on whether or not the respondents had received specific training on due diligence, respondents were more likely to feel confident in their process if they had had training.

For example, 70 percent of those who cited '4–Confident' to '5–Very Confident' said 'Yes' to having received training. For those who cited '3–Unsure' to '1–Not Confident at All' in their process, 65 percent said 'No' for having had training.

**CONFIDENCE: SURVEY QUESTION #2**

How seriously do you think due diligence is taken at your organization?



**Finding**

58 percent of respondents cited that they felt due diligence is taken '4-Seriously' to '5-Very Seriously' at their organisations. However, 42 percent felt '3-Unsure' to '1-Not seriously at all', showing a somewhat divided feeling amongst respondents.

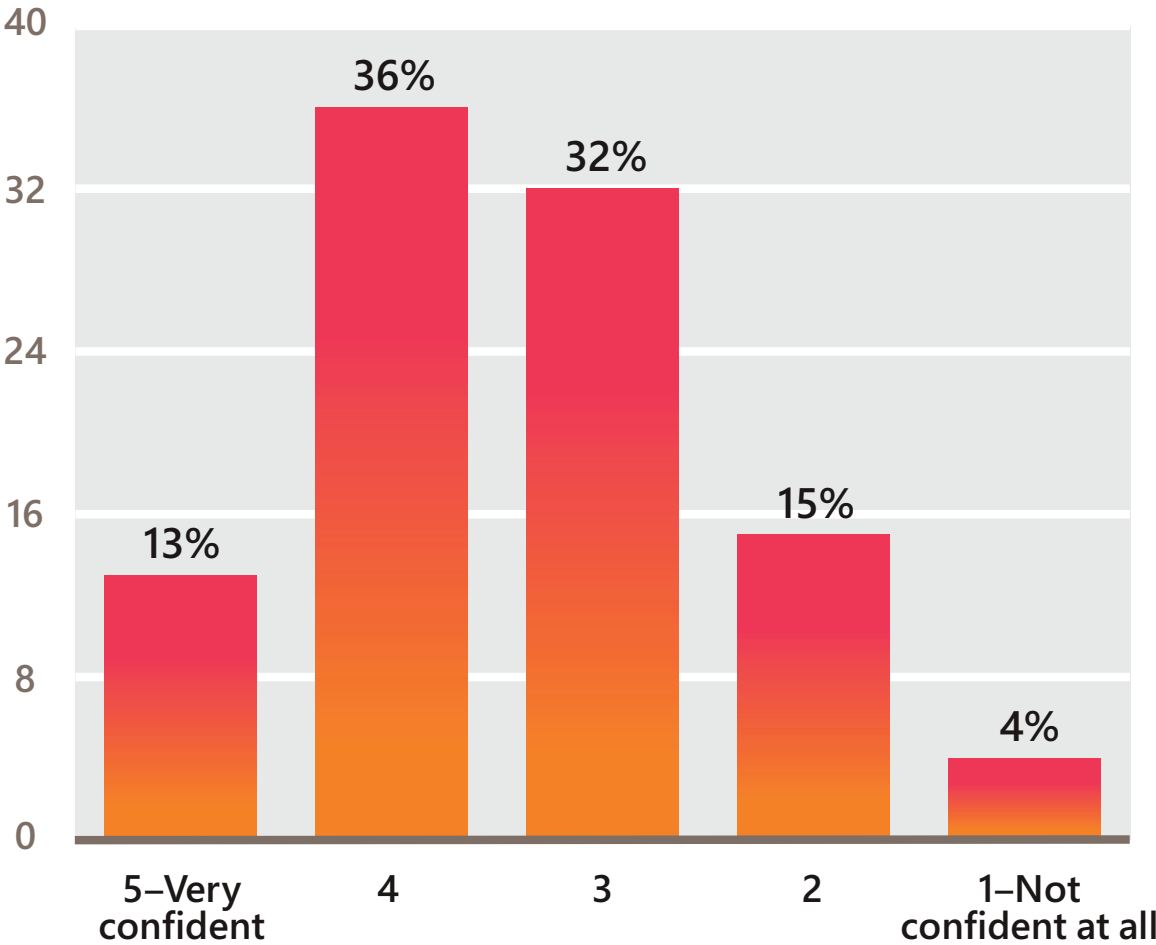
**Cross Examination**

Contrasting these results with income level, one does not find a significant correlation between higher income and higher levels of seriousness.



**CONFIDENCE: SURVEY QUESTION #3**

If a PR crisis were to occur, are you confident your department would know what steps to take?



**Finding**

Results here demonstrate another split feeling amongst respondents, with 49 percent expressing confidence by citing '4-Confident' to '5-Very confident', and 51 percent expressing a lack of confidence by either citing '3-Unsure' to '1-Not confident at all'.

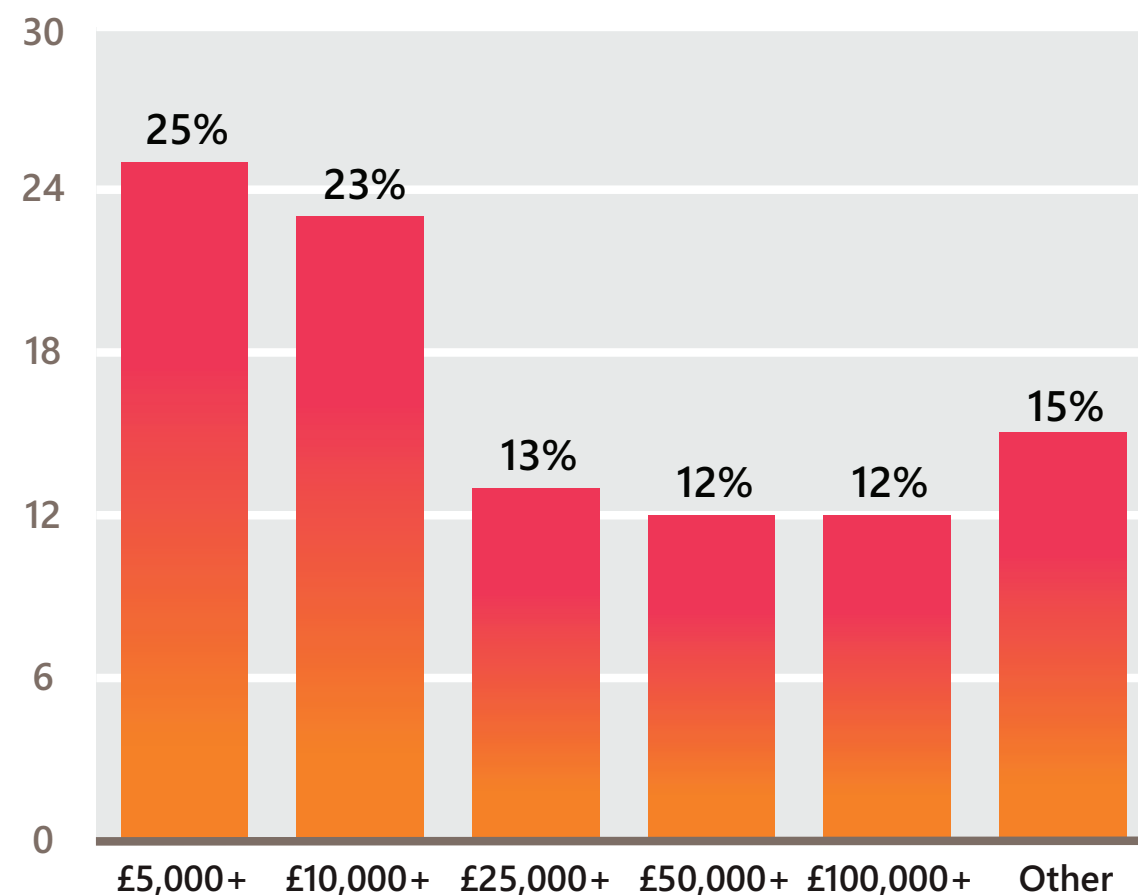
**Cross Examination**

There was no correlation between having a higher due diligence budget, a later question in the survey, and feeling more confident in a department's ability to handle a PR crisis. However, there was a correlation between having been trained in due diligence, another later question in the survey. For example, those who cited that they felt '5-Very Confident', 79 percent said 'Yes' to having received training, and of those who cited '1-Not Confident at all', 75 percent said 'No' to training.

# Gift Levels, Triggers & Authority

## SURVEY QUESTION #4

In your standard process, what is the gift/solicitation amount at which your lowest due diligence process is activated?



### Finding

This question is essentially asking at what donation threshold does your official due diligence process start. Of those who responded, 48 percent start their due diligence process with a donation between £5,000 to £10,000, and 53 percent at £25,000 or more. Those that cited 'Other' often gave lower thresholds like £1,000.

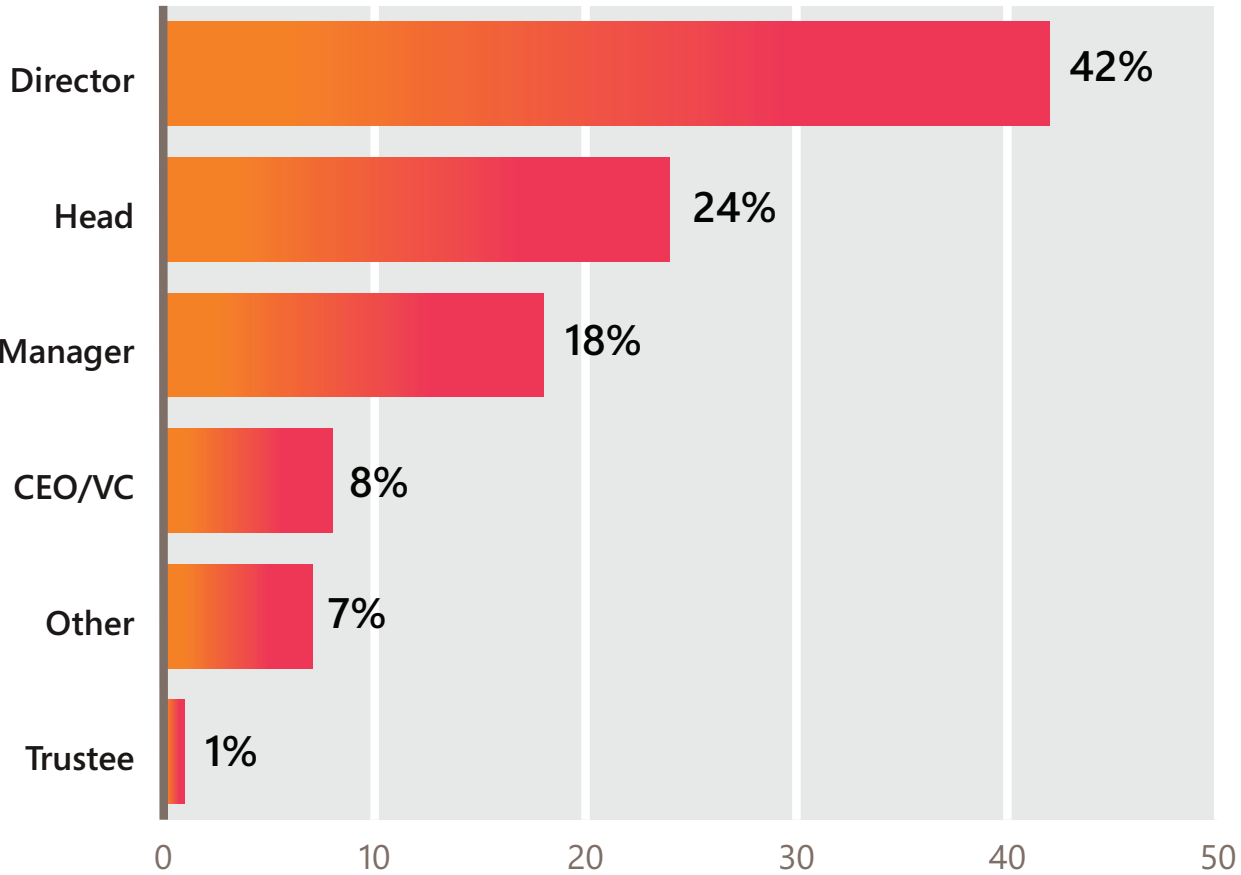
### Cross Examination

Contrasting these results with income level, one does not find a significant correlation between higher income and higher threshold levels. This fairly equal range of results suggests that the sector has not yet reached a consensus on proportionate risk management.

For example, 5 organisations with an income of £25m+ started their due diligence process at a donation level of £5,000, whereas another 5 with the same income started at £100,000. This raises questions like, should an organisation with £25m+ income ever be starting their due diligence at £5,000 or not? What is proportionate? How do we decide where these thresholds should be?

**GIFT LEVELS, TRIGGERS & AUTHORITY: SURVEY QUESTION #5**

Who is the lead (or principal) authorizing signature for whether the gift is accepted at the lowest gift level?



**Finding**

42 percent of those authorising the lowest gift level were Directors, 42 percent were Heads or Managers; 9 percent were being authorised by their highest level of leadership, CEO or Trustee. Those that cited ‘Other’ tended to mention Gift Acceptance Committees.

At 42 percent, the volume of Heads and Managers involved with accepting donations is perhaps unexpected. One might have anticipated the majority of donations to be authorised by the Director, as in general, they are more removed from the day-to-day acquisition of smaller donations.

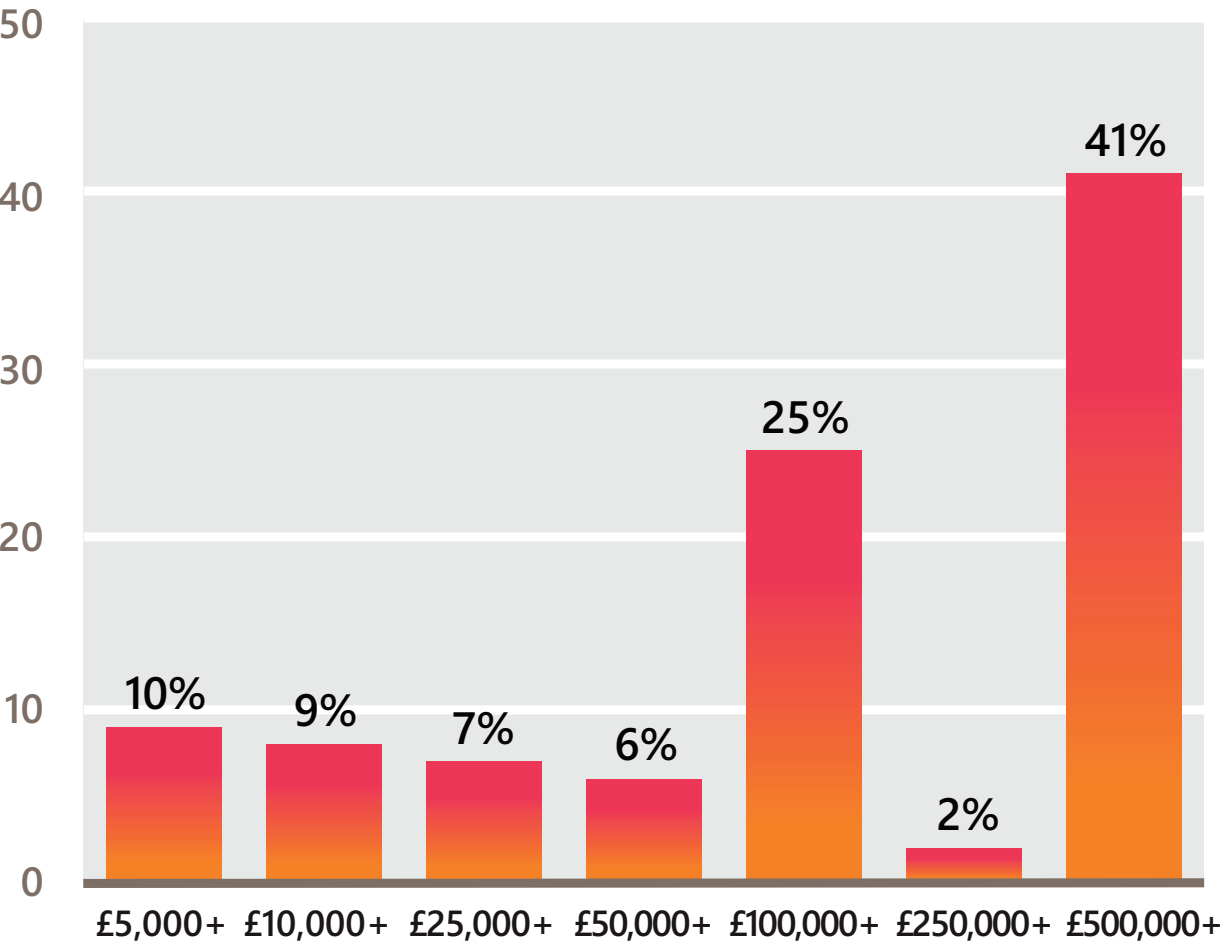
Ultimately, these results pose serious questions on neutrality. How far is it acceptable for a Manager, Head or even a Director of a fundraising department to accept or reject their own department’s donations? This existential tension has existed right from the introduction of due diligence in the sector, and some may see it as an unavoidable consequence of the resource restrictions not-for-profits face.

**Cross Examination**

One may expect that where CEOs/VCs are the authorizing signature, it is because they are in lower-income organisations; i.e., the organisation has fewer resources and smaller teams and so require support from senior staff. However, of those organisations that supplied this answer, 38 percent were in the highest income at £25m above.

**GIFT LEVELS, TRIGGERS & AUTHORITY: SURVEY QUESTION #6**

In your standard process, what is the highest gift/solicitation amount at which your due diligence level is activated?



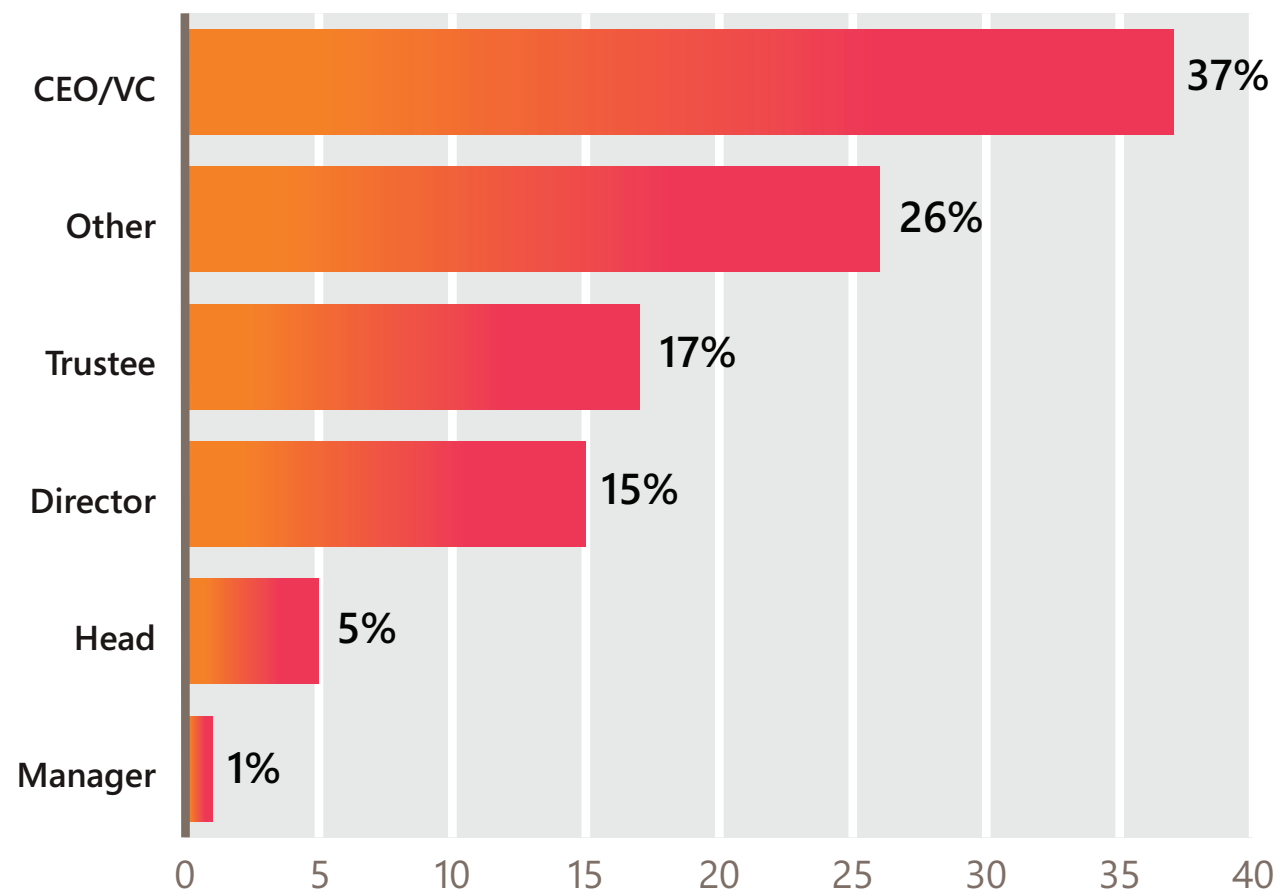
**Finding**

68 percent of organisations start their highest due diligence level at £100,000 or above. This is expected given that a £100,000 donation is of substantial interest to both stakeholders and the press. 33 percent start between £5,000 and £50,000.



**GIFT LEVELS, TRIGGERS & AUTHORITY: SURVEY QUESTION #7**

Who is the lead (or principal) authorizing signature for whether the gift is accepted at the highest gift level?



**Finding**

As expected, a reasonable percentage of respondents cited someone with a more senior role as the authorizing signature for larger gift, with 53 percent citing CEO/VC or Trustee as their authorising signature. Of the 26 percent that cited ‘Other’, the second largest category, most cited Gift Acceptance Committee as the authoriser. 21 percent cited Director, Head or Manager.

**Cross Examination**

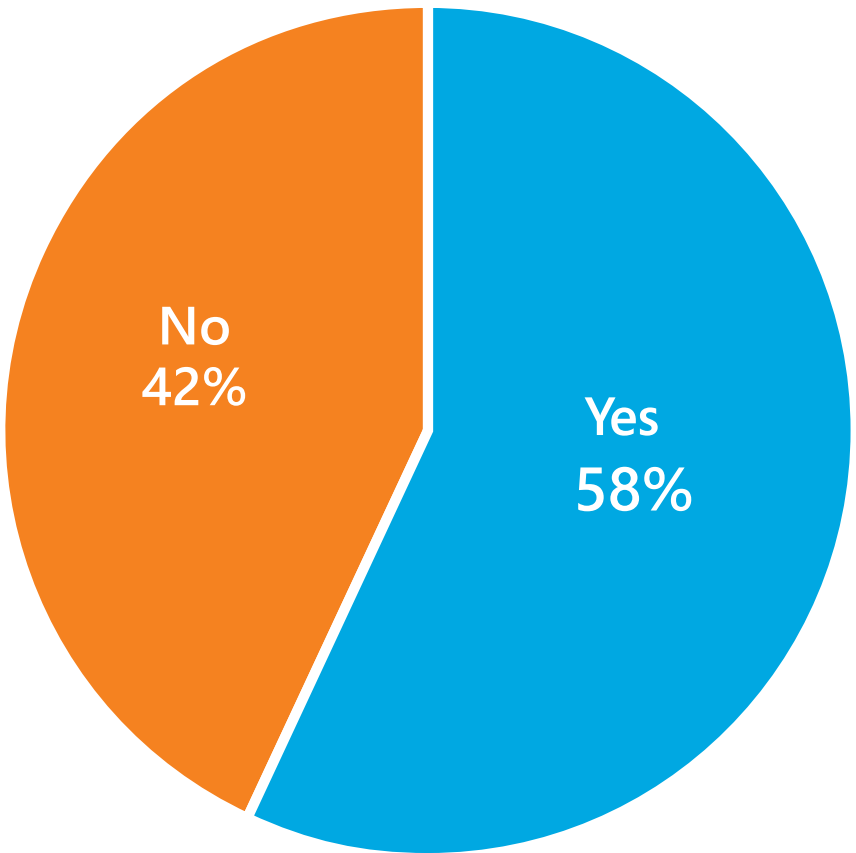
With lower levels of seniority accepting what ought to be the highest donation level and therefore the highest level of risk, the question of appropriate responsibility and neutrality arises again. For example, one organisation with an income of £25m+ cited their highest threshold at £500,000, yet it was being authorised by a Head.

**GIFT LEVELS, TRIGGERS & AUTHORITY: SURVEY QUESTION #8**

Do your thresholds take into account cumulative totals?

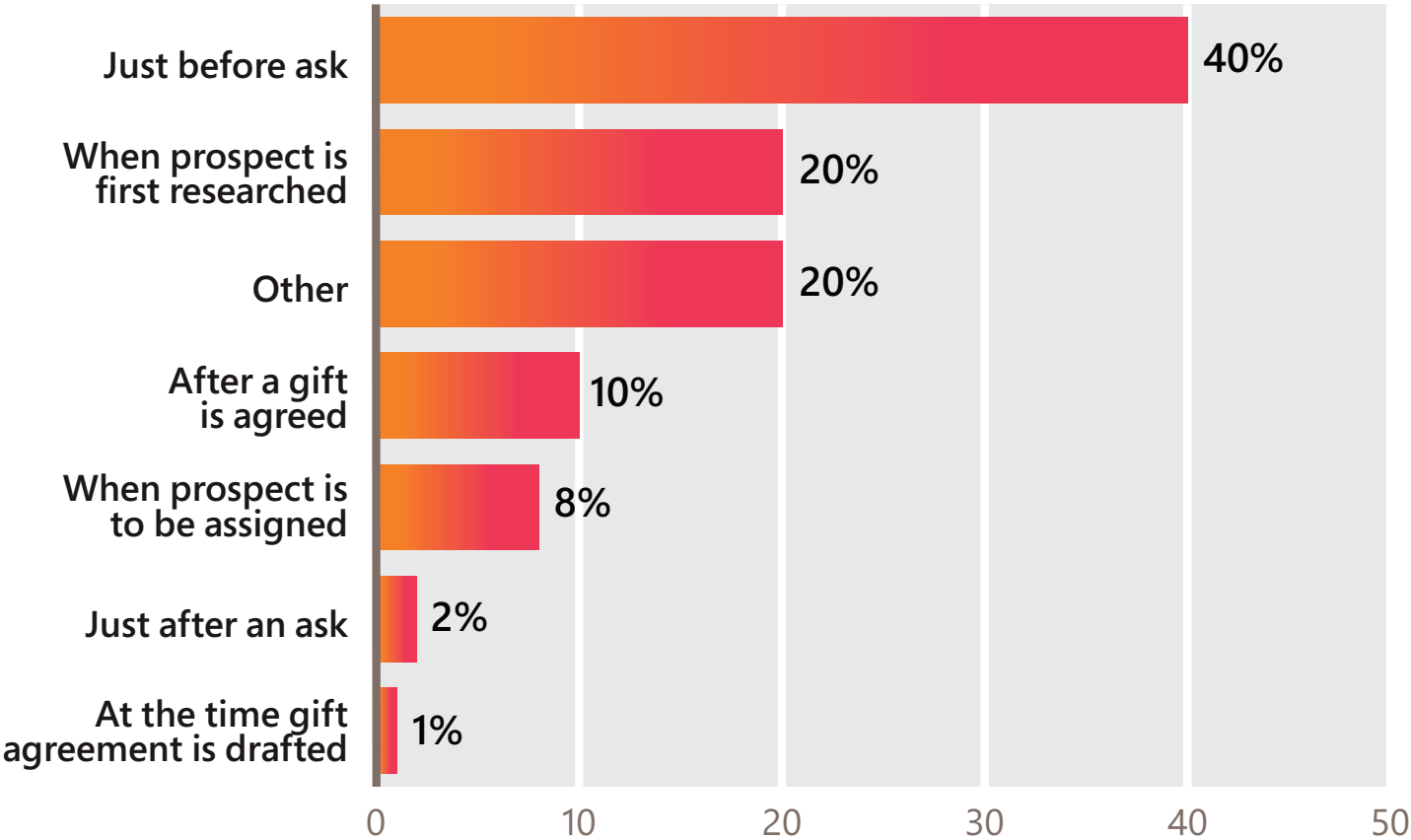
**Finding**

58 percent do take into account cumulative donation amounts, whereas 42 percent do not. This is another split result. Organisations capture cumulative gifts to ensure that those who gradually build up their donation total over a certain threshold receive appropriate due diligence attention, especially if, as part of their stewardship, they may receive public acknowledgment. This may highlight some exposure points for some organisations.



**GIFT LEVELS, TRIGGERS & AUTHORITY: SURVEY QUESTION #9**

In general, at what stage in the relationship is your due diligence triggered?



**Finding**

Though the donation thresholds presented on pages 11 & 13 largely decide the level of authorisation, exactly at what moment in a fundraising relationship due diligence research begins is the subject of this question.

40 percent begin their due diligence ‘Just before an ask is to be made’, 20 percent ‘At the time a prospect is first researched’, 20 percent ‘Other’, which largely included comments like ‘it depends’, and 10 percent ‘Just after a gift is agreed’.

It is expected that the majority of research is started just before an ask is made, as this is commonly when due diligence is requested by fundraisers. However, the results still show a significant range of strategies taken by organisations.

**Cross Examination**

In examining these results against annual income, one does not find any particular differences; all levels of income have a similar composition of approaches. Compared to due diligence staff levels, the composition of approach was similar whether you had a team of 1 or less, 2 to 4, or 5 to 9.

## GIFT LEVELS, TRIGGERS & AUTHORITY

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### SECTION SUMMARY

Though some useful benchmarks are emerging, the sector exhibits a relatively inconsistent application of the due diligence process. Some comparable organisations have high thresholds and some have low thresholds. Who authorises each level also does not correlate conclusively with income or donation size.



# Additional Due Diligence

## SURVEY QUESTION #10

Do you conduct due diligence on non-prospects/donors?

	Yes	No	N/A
Leadership Volunteers	66%	34%	0%
Speakers	17%	70%	13%
Honorary Degree recipients	34%	30%	36%
Prospective Corporate Partners	79%	15%	6%
Other	27%	73%	0%

### Finding

The primary aim of the survey is to address due diligence practice in philanthropy. However, many departments also conduct additional due diligence and it is this area that this question focuses on. The relevance of the results below will vary depending on institution.

The two highest additional activities were due diligence on Leadership Volunteers and Prospective Corporate Partners. A small portion of organisations conducted due diligence on Speakers. A split result was found for Higher Education institutions among those that conduct due diligence on Honorary Degree recipients vs. those that do not.

How far any of these are the responsibility of due diligence teams based in fundraising departments brings into question the real purpose of due diligence. Is it just for fundraising activity or to protect the institution's reputation as a whole?

# Gift Acceptance Committees

## SURVEY QUESTION #11

Do you have a due diligence/gift acceptance committee?

### Finding

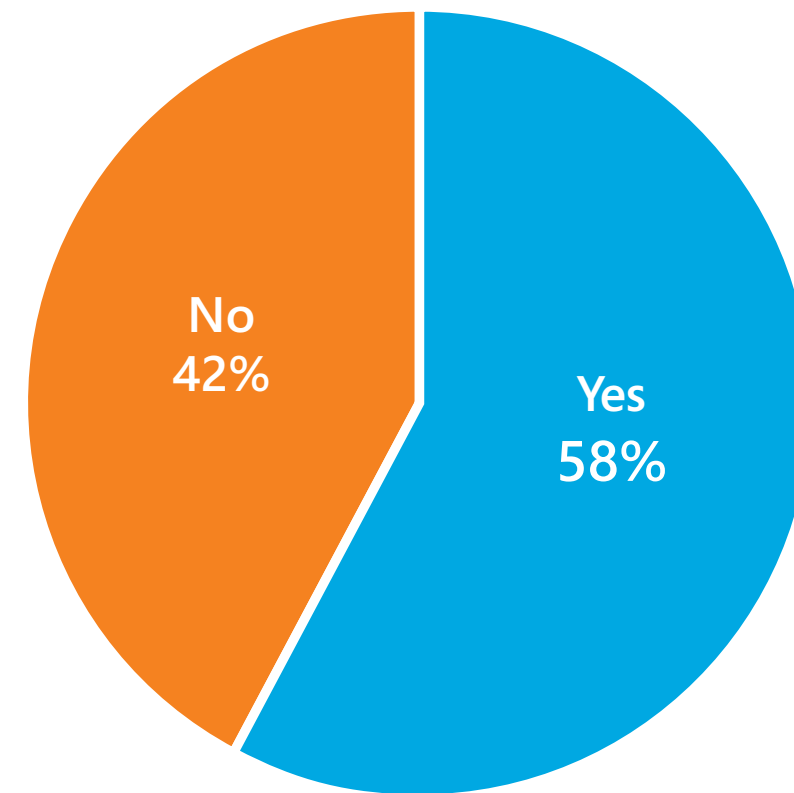
42 percent of respondents do not have a Gift Acceptance Committee, whereas 58 percent do. This is more of a split result than one might expect, especially given how committees help to distribute responsibility, add insight to decision making and support neutrality, all key objectives of a due diligence process.

### Cross Examination

Comparing the results with whether a respondent felt their organisation took due diligence seriously, one finds that the more serious an organisation was perceived to be in terms of due diligence, the more likely they were to have a Gift Acceptance Committee.

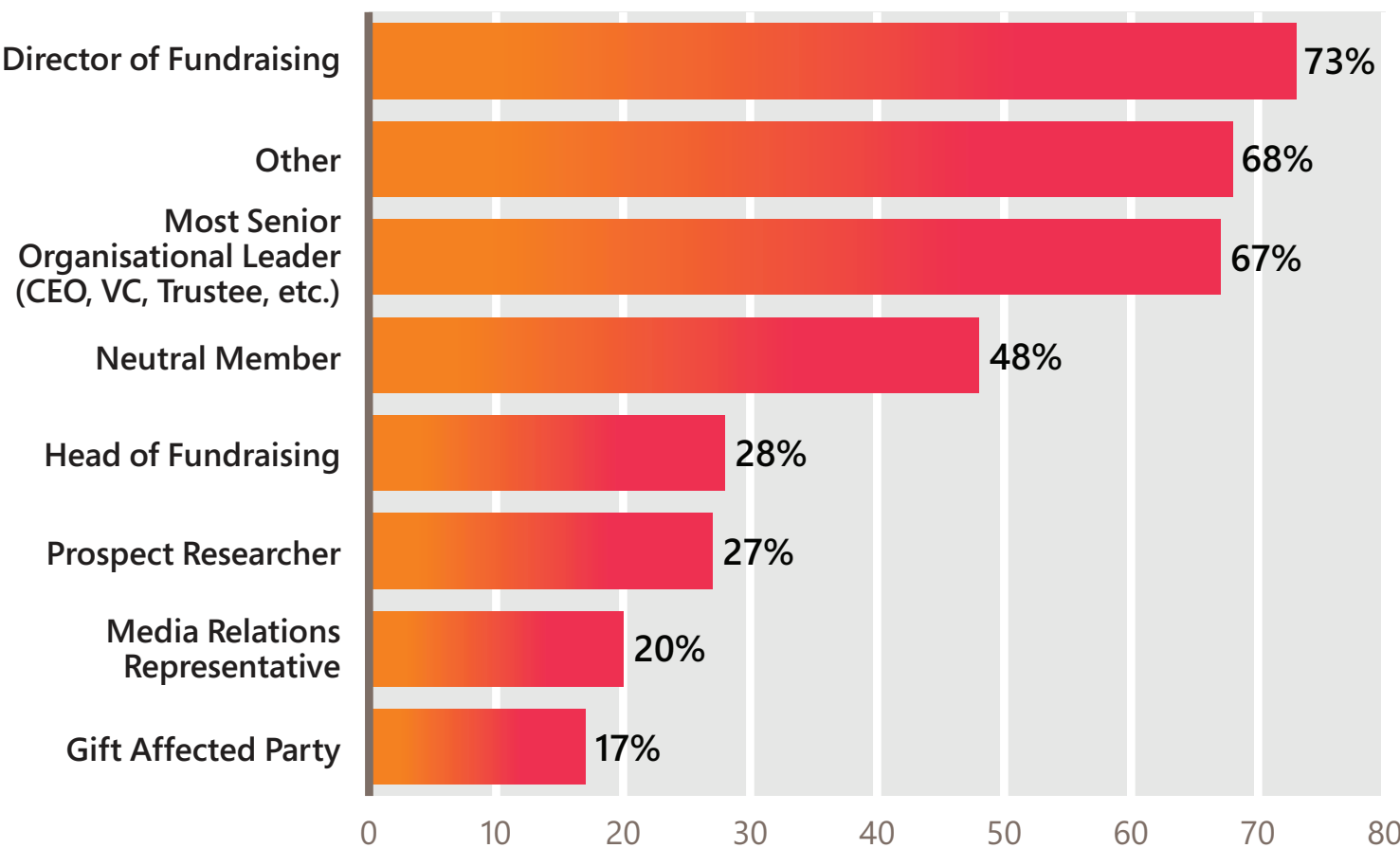
For example, of the organisations that cited '5 – Very Seriously', 89 percent said 'Yes' to having a Committee. For those that cited '1 – Not Seriously at All', 75 percent said 'No' to having a Committee. It is clear that having a Committee sends a strong signal that due diligence is taken seriously.

Comparing the results with annual income, there was a slight correlation showing that the higher the income, the more likely the organisation was to have a Committee. For example, of those who had an income of £25m or above, 65 percent had a Committee, whereas 71 percent of those with an income of £1m or less did not.



**GIFT ACCEPTANCE COMMITTEES: SURVEY QUESTION #12**

Who is on the diligence/gift acceptance committee?



**Finding**

Of those who said 'Yes' to having a Gift Acceptance Committee, the highest representatives were 'Director of Fundraising' and 'Most Senior Organisation Leader', found on 73% and 67% of committees respectively. Those that cited 'Other' predominantly gave titles not directly covered, like 'Trustee' or 'Academic'.

What was positive and perhaps unexpected was a reasonable representation of a 'Neutral Member' found on 48% of committees, demonstrating a further commitment to neutrality. Additionally, any representation of a Media Relations Representative and Gift Affected Party shows further thoughtful effort to inform decisions.

One could argue that Prospect Researchers deserve more representation. Not to have a say in decisions but for practical support to elucidate the details of the research process & resources used.

## GIFT ACCEPTANCE COMMITTEES

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### SECTION SUMMARY

A well-balanced Gift Acceptance Committee would readily be conceived as good practice in due diligence. It shares responsibility, supports objectivity and promotes neutrality. This section provided some useful insights on how such committees can be composed.



# Risk Factors

## SURVEY QUESTION #13

Please rank by level of importance the top 3 main risk factors you are looking for.

Research Priority	Ranked #1	Mean Ranking	No of Rankings
Financial crime, corruption or bribery	42%	1.7	85
Misalignment of org values	23%	2	58
Pending major prominent allegations	13%	2.3	69
Negative news	12%	2.6	69
Proof of identification	10%	3.1	23
Conflict of interest	1%	3.5	23
Politically exposed person	0%	4.9	11
Tax evasion or fraud	0%	3.4	23

## Finding

The top risk concerns by importance were financial crime, corruption or bribery, misalignment of organisational values, and major allegations. This grouping covers most of the essential areas that ought to protect any not-for-profit from undue negative influences.

What is notable is that conflict of interest was one of the lower ranking concerns. An example of this might be a prospective donor having a pre-existing connection that allows favoritism or a donation that prescribes undue influence on the organisation. Given its low level of importance, this could illustrate a potential exposure point for many organisations.

Further research would be of interest that explores how confident organisations are in identifying these risk factors.

## RISK FACTORS

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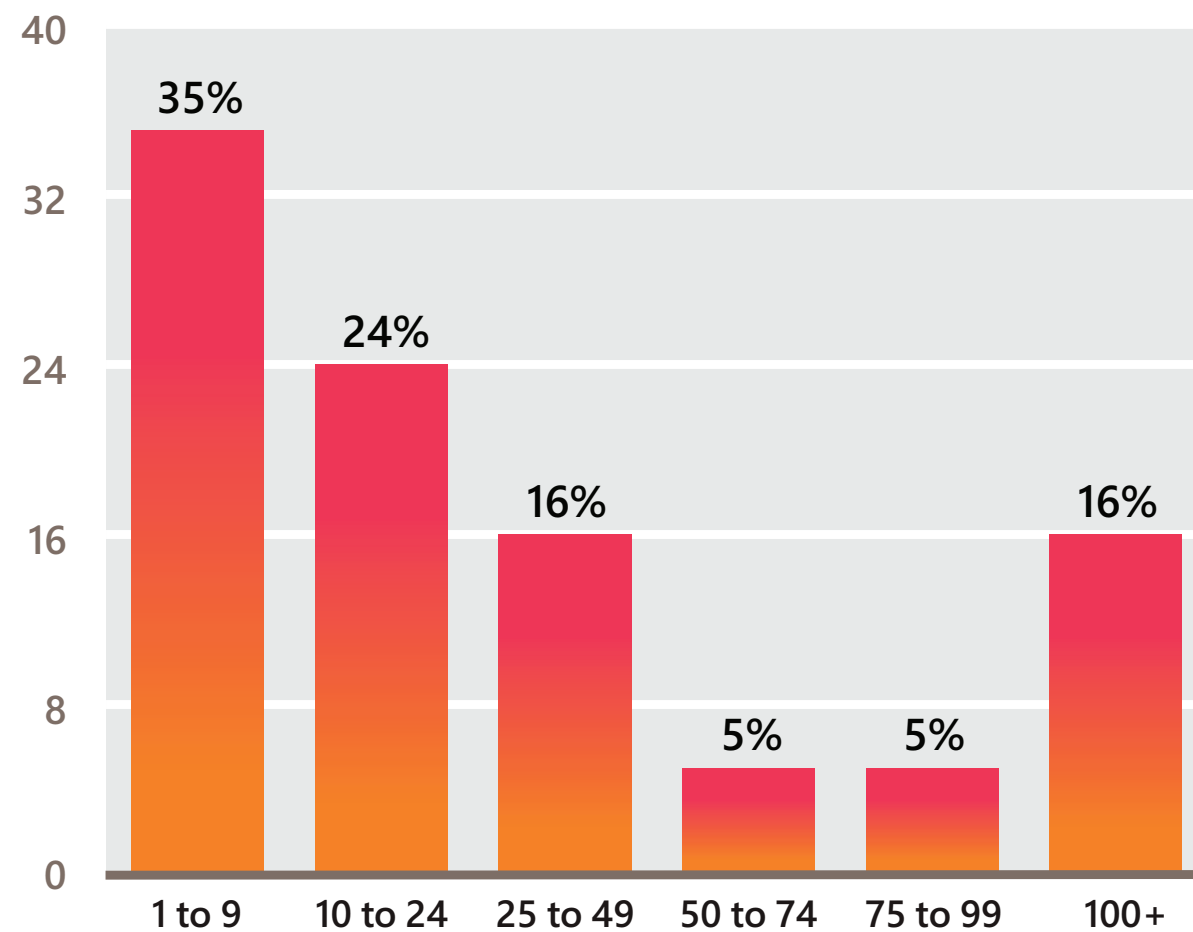
### SECTION SUMMARY

Our current due diligence culture leans towards reputational impact over the mechanics of the donation. This may be the correct setup as far as fundraising departments are concerned, if conflict of interest is being reviewed elsewhere. However, for those based in the UK, the Charity Commission states that an assessment of conflicts of interest must be part of a due diligence process to help reduce conditions that 'could undermine the charity's independence'. (*Due Diligence & Monitoring & End Use of Funds, Charity Commission*)

# Report Volume & Time

## SURVEY QUESTION #14

How many full due diligence reports do you complete per year on average?



### Finding

These results offer a useful benchmark on the typical volume of due diligence reports per year, with 1–9 reports being the most common volume at 35 percent, 10 to 24 being the second at 24 percent, and 25 to 49 being the third at 16 percent.

### Cross Examination

Report volume is a continual point of discussion for those engaged in due diligence, so the most common responses have been broken down by income:

- £1m or less saw 1 to 9 reports as their most common response at 35 percent
- £2m–£4.9m saw 1 to 9 also as their most common response at 71 percent
- £5m–£9.9m saw 10 to 24 as their most common response at 42 percent
- £10m–£24.9m saw 10 to 24 and 25 to 49 as their most common responses at 31 percent each
- £25m+ jumped to 100+ as their most common response at 37 percent

*(continued on next slide)*

## REPORT VOLUME & TIME: SURVEY QUESTION #14 (continued)

As has been typical across the survey, each income band exhibits extremes in approach. For example, in contrast to the findings on the previous page, of those with an income of £25m+, 30 percent conducted 1 to 9 reports per year, the second highest response in that band. Furthermore, of those with an income of £1m or less, 7 percent conducted 100+ reports per year. These polarised results illustrate that report volume comes more from a process decision rather than a natural consequence of increasing income volume.

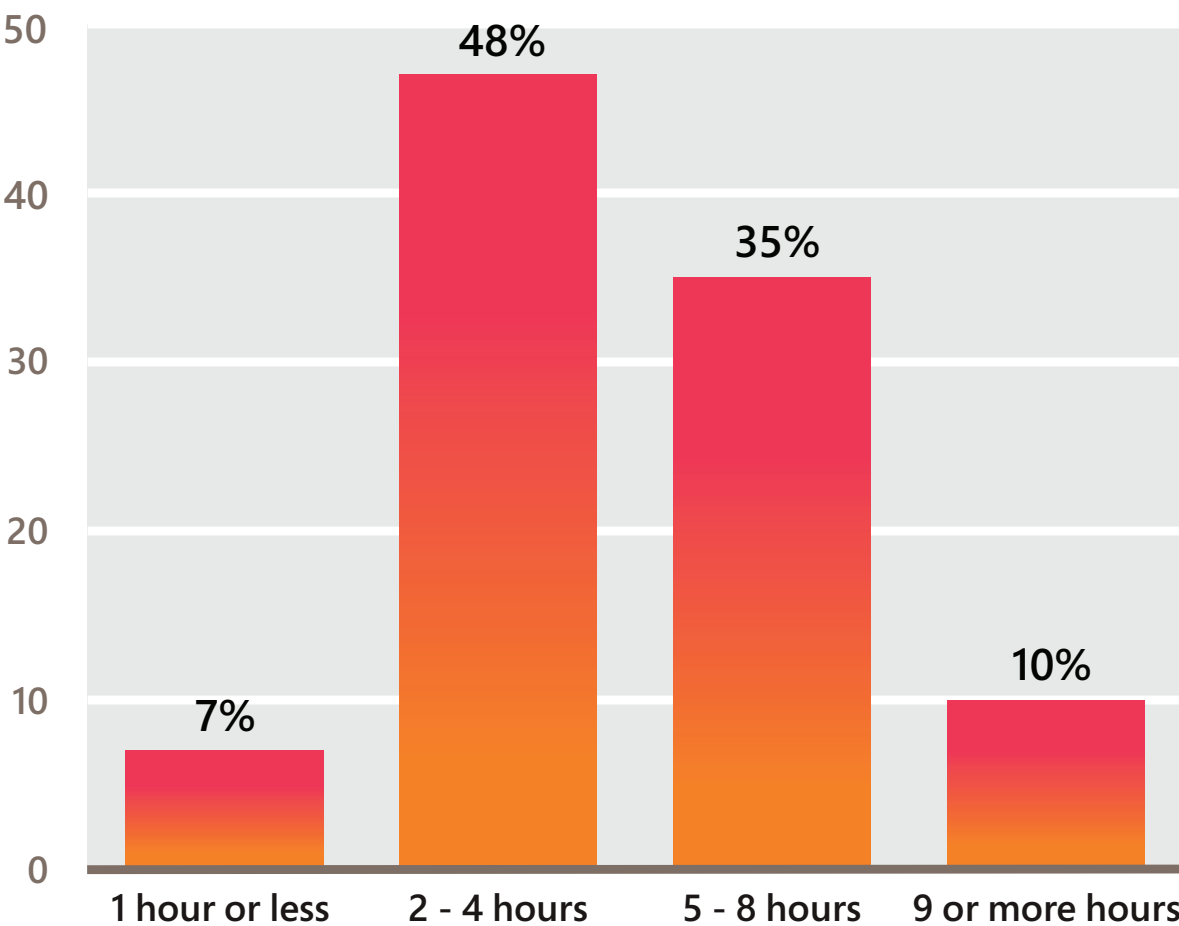
When comparing report volume to due diligence staff levels, one found that the larger the team, the higher the report output. For example, of those who had a team of 1 or less, 33 percent cited 1 to 9 reports per year vs. a team of 5 to 9, for which 100 percent reported a volume of 100+. However, there were some significant extremes again, with 8 teams of 1 or less reporting a volume of 100+ reports per year.





# REPORT VOLUME & TIME: SURVEY QUESTION #15

How long does each report take, on average?



## Finding

Just less than half of respondents (48 percent) took 2 to 4 hours per due diligence report, with 35 percent taking 5 to 8 hours. The results present a clear benchmark on how long standard due diligence reports take. Further investigation is needed to establish how much depth is required to adequately protect an organisation. However, those citing 1 hour or less or 9 or more hours might benefit from comparing their practices.

## Cross Examination

When contrasting hours spent per report with report volume, one may anticipate that the higher output of reports is achieved through staff spending less time per report. However, whether 1 to 9 or 100+ reports were completed per year, it took about the same number of hours. For example, for each level of report volume, the most common responses were either 2 to 4 or 5 to 8 hours.

Again, extremes were found in all levels of income, indicating that some teams spend significantly more time on due diligence than their counterparts. For example, some organisations that conducted 100+ due diligence reports per year took 9 or more hours per report with a team of only 1 or less — totalling 900 hours per year. However, a significant portion of other organisations with the same team of 1 or less conducting 100+ reports spent 2 to 4 hours per report — less than half the time.

## REPORT VOLUME & TIME

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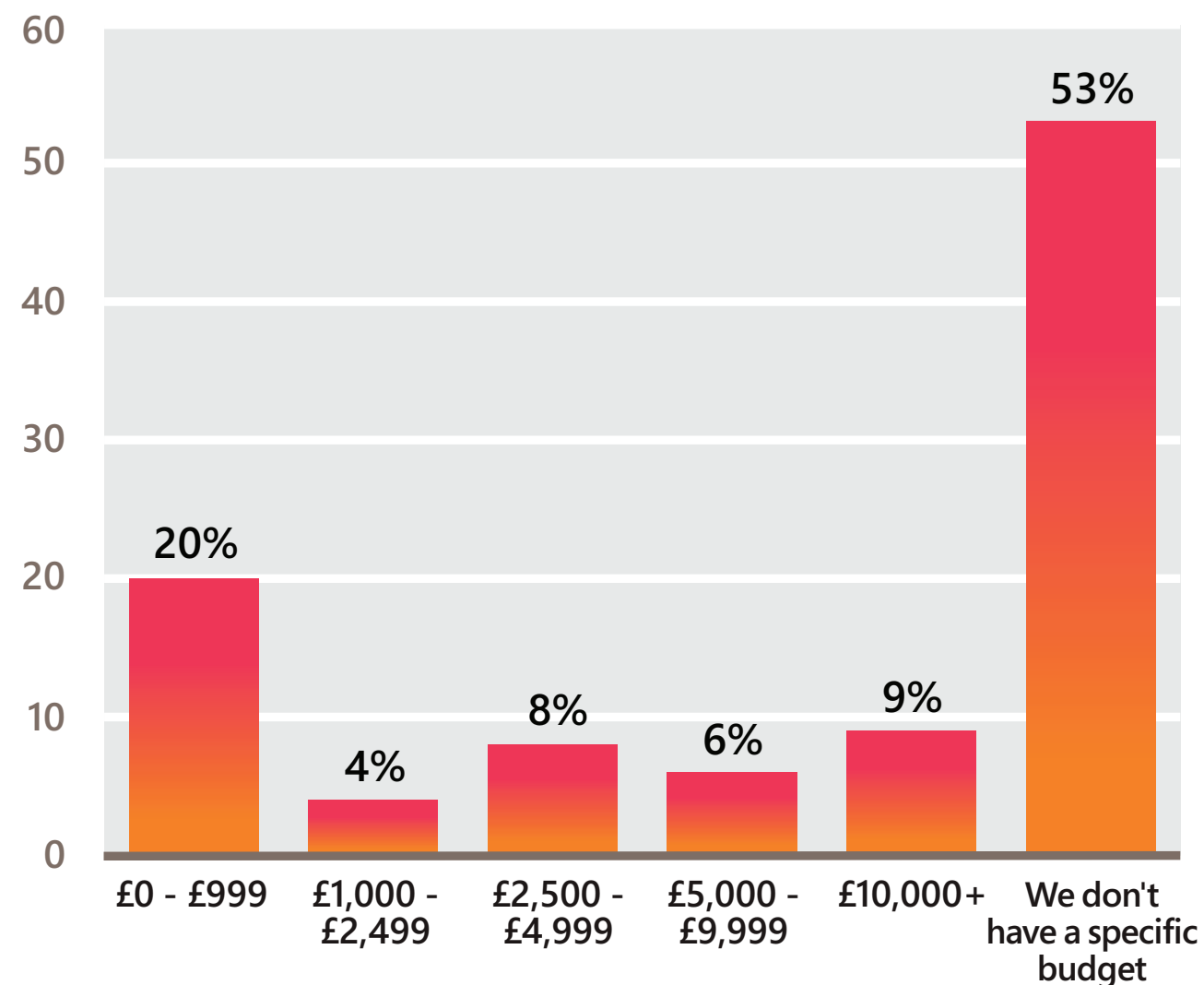
### SECTION SUMMARY

Although there are some clear results useful for benchmarking, there were a number of extreme outliers that indicate that some organisations either have a lower tolerance for risk or simply struggle to know what is proportionate. Since due diligence is still in its nascent stage, it is difficult to say what report volumes we should realistically expect to help protect our organisations.

# Resources

## SURVEY QUESTION #16

What is your (non-staff) budget specifically for due diligence?



### Finding

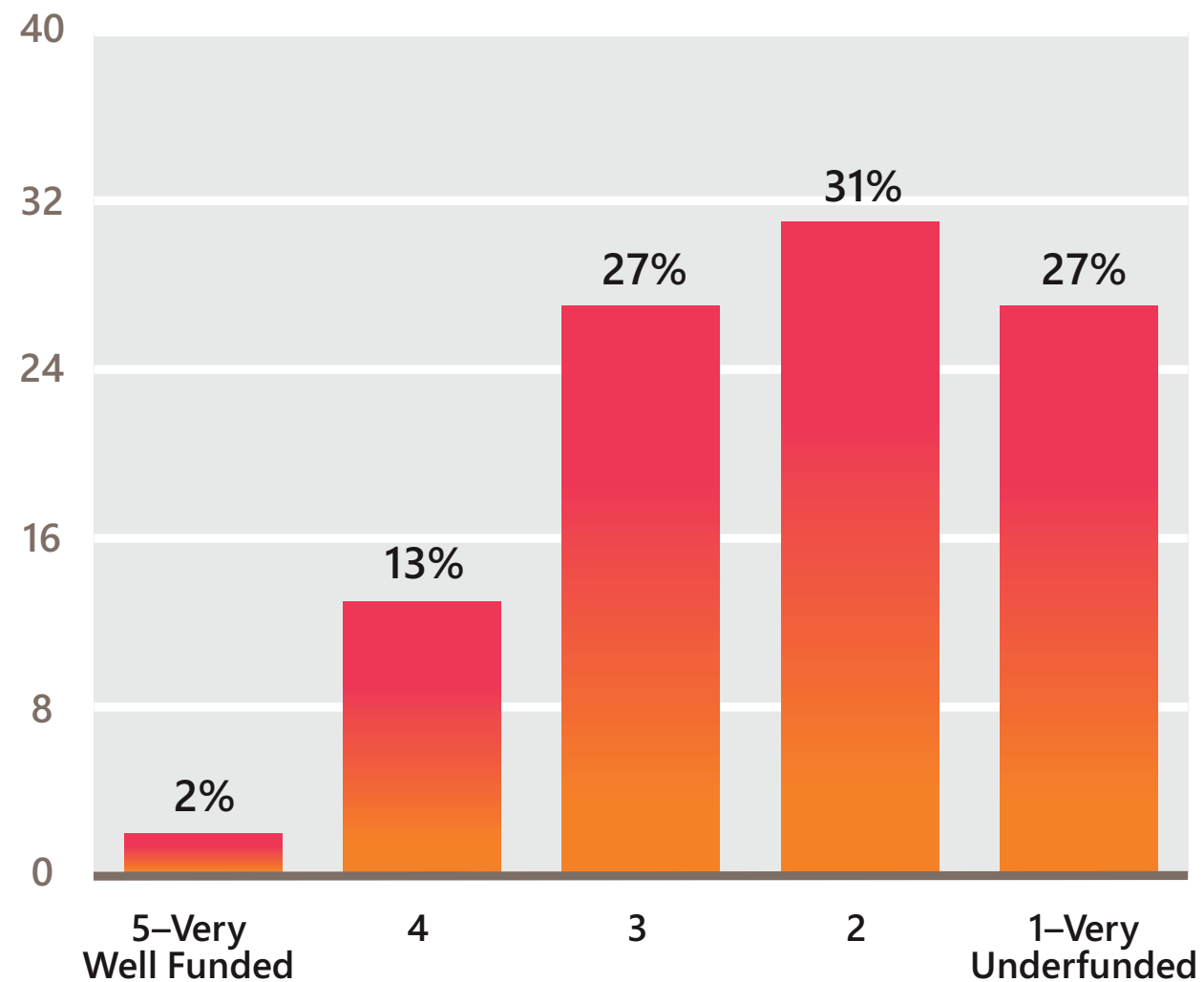
In total, 53 percent of respondents did not have a specific budget for due diligence, whereas 47 percent did. Of the 53 percent who did not have a specific budget, many cited a general research budget that included resources used for due diligence — though 23 percent of those cited no budget for either. Of the 43 percent who did have a specific budget, 20 percent cited £0—£999, with the second highest budget chosen at £10,000+, at 9 percent.

### Cross Examination

Comparing budget level did not show a significant correlation where a higher income resulted in a higher budget. Income levels from £1m or less through to £10m—£24.9m all cited £0—£999 as their most common budget. If you had an income of £25m+, the most common budget at 38 percent was £10,000+, with £0—£999 in second place at 29 percent.

### RESOURCE: SURVEY QUESTION #17

How well do you feel the due diligence team is funded compared to other teams in your fundraising department?



### Finding

58 percent of respondents felt underfunded, 27 percent felt unsure, and only 15 percent felt well funded or very well funded.

## RESOURCE: SECTION SUMMARY

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### SECTION SUMMARY

It is clear the respondents feel significantly underfunded. Though again, it's difficult to know exactly what budget is needed to protect an organisation. However, with some organisations with an income of £25m+ only designating £0—£999, of which there were 10, these responses do become more understandable. Researchers may also need to do more to evidence for the need for additional resources.

# Training

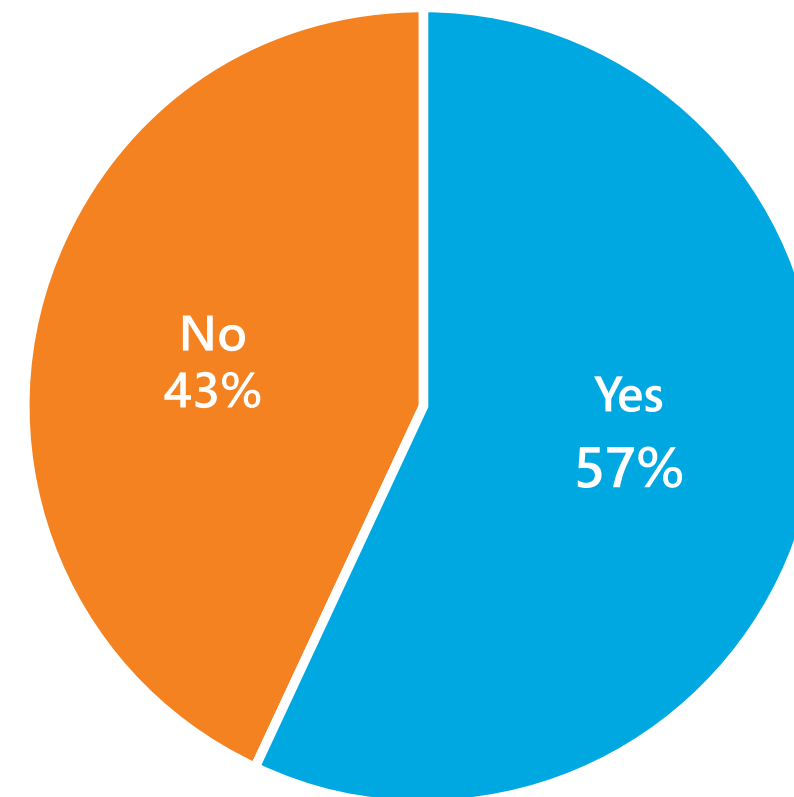
## SURVEY QUESTION #18

Have you or any member of your team ever received training on due diligence, ethics, and/or reputational risk?

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### Finding

These results suggest that a considerable number of organisations are supported by untrained due diligence teams. This is likely due to specialist training being largely unavailable, particularly as an emerging area. Nonetheless, this has to be addressed, especially as earlier results showed that training correlated strongly with confidence levels. Leaders might need to think more creatively on how to get teams the training they need.





# Conclusion

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The survey creates a contrasted picture of how due diligence is undertaken across the sector, with a number of split results on key issues. In general, there is inconsistency in the process application, including in thresholds, authorisations and resources. These manifest as extreme differences among comparable organisations of all sizes and incomes. This suggests a sector still grappling with a coherent 'logic' on how to do due diligence, particularly around establishing consistent risk tolerance and proportionate risk management.

Respondents themselves feel relatively confident that their processes will uncover reputational risks but feel sceptical of their department's ability to handle a crisis. In general, they feel due diligence is significantly underfunded and not always taken seriously.

Nonetheless, a generic image of good practice is emerging and there are some clear 'leaders' in most survey results. As such, the results offer some useful initial benchmarks, which are particularly beneficial for those organisations that have found themselves as 'outliers' or are developing a process.



# Recommendations

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- 1. Sector Consensus**—The sector has to try and find its way to a consensus on what is considered proportionate risk management. The more a standard expectation and logic can be established, the more organisations can align themselves to it and justify appropriate resources. It is hoped this survey is a start of this journey.
- 2. Periodic Review**—Whilst due diligence is still in its nascent stage, organisations would benefit from periodic reviews of their process. As the results illustrate, process application ranges greatly with some significant outliers, divides and gaps. Setting a culture of review will help strengthen procedures over time and stop unexpected reputational issues from slipping through as knowledge in this area grows.
- 3. Stakeholder Research**—Stakeholder research and focus groups could help establish more clear reputational tolerances. What donation levels, types and issues really matter to supporters? This research would have to be conducted in the context of risk vs. resource.
- 4. Revise Resource**—It is clear that the sector feels underfunded. More exploration, discussion and realism on what due diligence costs are needed.
- 5. Uplift Knowledge**—Training was absent for many teams, which directly impacted personal confidence in the process. Further, there was a lack of confidence in a department's ability to handle a crisis and a feeling that due diligence is not always fully appreciated. More training provision across the whole department would help uplift confidence.
- 6. Enhance Neutrality**—There is a potential overreliance on fundraising staff authorizing their own department donations. Gift Acceptance Committee's also do not typically have a neutral party or a gift affected participant. This is likely down to common resource issues faced by all not-for-profits. However, for the matter of protection, it may be advisable to uplift neutrality wherever possible—especially establishing a Gift Acceptance Committee where there is none.
- 7. Deepen Report Content**—Report content was one of the most conclusive areas of the survey, though one key aspect appeared largely overlooked—conflict of interest. For some respondents, this may have been considered as part of another risk factor, like 'Misalignment of Org Values', or taken care of in another process or even department; however, it is advisable to check to ensure these considerations are met.
- 8. Clearer Delineation**—Perhaps some of the issues cited above are a result of an unintentional conflation of functions, particularly of prospect research and due diligence. Due diligence is a highly specialised area that in reality is a separate function from prospecting. Having clearer delineations, like dedicated staff and budgets, could help attract more resources and elevate a sense of seriousness where needed.

# About the Authors

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Jason Briggs  
*Consulting Partner*



**Jason Briggs** is a consulting partner with the BWF Europe division. As a consulting partner, he also serves as the co-founder of PyroTalks CIC, a community interest company that provides accessible specialist knowledge to the nonprofit sector.

Previously, Jason was director of development at Cavendish Cancer Care, with a track record of success at all giving income channels. While Jason was at the University of Sheffield, he headed up the prospect research & insight teams, and he sat on the senate's academic research ethics committee. He also previously worked as a consultant for Graham-Pelton, specializing in insight and campaign planning.

Jason is a Fellow for Halpin Partnership, specializing in higher education advancement. He is an active committee member for the CIOF Researchers in Fundraising Committee, which runs Europe's largest gathering of fundraising intelligence specialists. He is a founding trustee for Land of Joy, which raised £1.2m to establish a Tibetan retreat centre, and he also serves as a trustee for the Foundation for Developing Compassion & Wisdom.

Jason has a uniquely varied experience in the nonprofit sector, having gained senior experience of both systems and leadership roles. His experience ranges across higher education, national and local charities, and healthcare, as well as religious organizations. He is known for his free-thinking approach to advancement, having been awarded an Insight in Fundraising Award 2016 for his work on international philanthropy, and CASE Europe Iain More Award 2017 'for emerging development professional'. He holds a 1st Class degree in History & Philosophy and a Diploma in Fundraising Management from The University of Sheffield.

## ABOUT THE AUTHORS

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Alex Oftelie

*Senior Vice President of Decision Science, BWF*



**Alexander Oftelie** is senior vice president of decision science at BWF where he oversees all BWF analytics engagements, workshops and trainings, and product implementation. His specific areas of expertise include predictive modelling, business impact analysis, survey design and sampling methodology, analytics training and analytics implementation.

Prior to working at BWF, Alex worked as a nonprofit subject matter expert for IBM and as an advanced analytics consultant for Gallup. At IBM, Alex specialized in helping clients understand and demonstrate the impact of business analytics on fundraising and engagement efforts of nonprofits throughout North America.

He is a recognized leader, speaker and trainer for CASE, AHP and Apra and holds a Bachelor of Arts from St. Olaf College and a Master of Public Affairs from the University of Minnesota.



# About BWF

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For nearly 40 years, BWF has been committed to advancing the critical work of the world's leading hospitals, health systems, research institutes, children's hospitals, education and healthcare NGOs.

BWF, a full-service philanthropic consulting services firm, provides nonprofits with campaign management, high-net-worth fundraising, organizational consulting, data science, digital marketing, and more.

## SENIOR LEADERSHIP

**Josh Birkholz**, Chief Executive Officer

**Katrina Klaproth**, Chief Operating Officer and President of Philanthropic Services

**Mark Marshall**, President of Philanthropic Counsel



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