



**Bold Leadership**

**Transformative Fundraising**

WorkBook Companion

**Fueling your Mission:**

**Proven Fundraising Strategies, Sources and Tip**

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Bold Leadership. Transformative Fundraising.

WorkBook Companion

**Fueling your Mission: Proven Fundraising Strategies, Sources and Tip**

**1. My organization impacts people in our community by:**

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**2. Our Vision is:**

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**3. Our Mission is:**

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**4. We are unique because:**

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**5. If we do not get donations from the community, then:**

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**6. We require financial support in the following areas:**

Core Operating: \$ \_\_\_\_\_

Project: \_\_\_\_\_ \$ \_\_\_\_\_

Project: \_\_\_\_\_ \$ \_\_\_\_\_

Project: \_\_\_\_\_ \$ \_\_\_\_\_

Capital Project: \_\_\_\_\_ \$ \_\_\_\_\_

Endowment (Y/N): \$ \_\_\_\_\_

**7. My fund development team members are or should be:**

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

**8. My top 5 current supporters (or groups of supporters) to our organization are:**

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

**9. Potential new supporters (or groups of supporters) to our organization could be:**

1. \_\_\_\_\_

2. \_\_\_\_\_



3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**10. How can people give to my organization in new ways?**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**11. If I was to send a letter, I would send it to the following groups connected to my organization:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

**12. Cultivation Plan for large donors (current or potential):**

**Donor #1** \_\_\_\_\_

**Next Actions:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_



Donor #2 \_\_\_\_\_

Next Actions:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

Donor #3 \_\_\_\_\_

Next Actions:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

### 13. Saying “thank you” strategies

Top three ways that our organization can do a special thank you!

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

### 14. Three special donors that I need to thank are:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

