



WorkBook Companion

Understanding Funding Options

Build the foundations for your case for support and highlight ways you can enhance philanthropy for your cause.

WORKBOOK COMPANION

Understanding Funding Options and your Role in Philanthropy

1. My organization impacts people in our community by:

2. Our vision is:

3. Our mission is:

4. We are unique because:

5. What is the need?

What it is, and who exactly will benefit by meeting that need? Keep the need manageable so your supporters feel they can make a difference. (Global poverty is too big to get their arms around. Focus on something more realistic... save a person or help a family.)



6. How can you tell this is a pressing need?

Make it clear that the need is now, and urgent. If possible, include surveys, expert opinions, or statements from those who need help.

7. How is your organization uniquely qualified to tackle this need?

While there may be several nonprofits that could deal with this issue, what is unique about you? Is it your track record, the innovative nature of your approach, other?

8. What will the benefits of your action be?

If you act now, what will be the positive consequences, both major and minor? Be realistic. What can be guaranteed, and what is possible?

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

What are the negative consequences if you fail? Sometimes this is the most potent motivator for donors, so lay out the major and minor adverse effects if there is no action.



10. How will you hold yourselves accountable?

11. We require financial support in the following areas:

Core Operating: \$ _____

Project: _____ \$ _____

Project: _____ \$ _____

Project: _____ \$ _____

Capital Project: _____ \$ _____

Endowment (Y/N): \$ _____

12. The top 5 current supporters (or groups of supporters) to our organization are:

1. _____

2. _____

3. _____

4. _____

5. _____



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

1. _____
2. _____
3. _____
4. _____
5. _____

15. A few *new* ways that people could give to our organization might include...

1. _____
2. _____
3. _____
4. _____
5. _____

16. My own personal strengths that I can apply to help raise funds and nurture donor relationships are:



17. If I were to send a letter, it would be to the following groups connected to my organization:

1. _____
2. _____
3. _____
4. _____
5. _____

18. Cultivation planning for significant supporters (current or potential):

Supporter #1 _____

Next Actions:

1. _____
2. _____
3. _____

Supporter #2 _____

Next Actions:

1. _____
2. _____
3. _____



Supporter #3 _____

Next Actions:

1. _____
2. _____
3. _____

19. Donor retention is of utmost importance to our organization. What are the top 3 ways that we can express our appreciation or make donors feel special?

1. _____
2. _____
3. _____

20. Three special donors that I need to thank are:

1. _____
2. _____
3. _____

21. My fund development team are (or should be) comprised of:

1. _____
2. _____
3. _____
4. _____



22. Other thoughts, ideas and inspiration

Great work. (You've got this.) Now spread the word for success!

