



Fundraising Priorities Checklist

Top 3 - MAP

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MAP

We employ a strategy we call MAP to help organizations position their planning activities to support scalable and sustainable growth in their engagement and revenue generation. We help you create resources that can effectively engage your entire organization, so your plans can do more than take up space on shelf.

- Measured** - What will you track and what does success look like?
- Analyzed** - Have you defined the problem and how are you are going to solve it?
- Practical** - Are your goals attainable and do you have the resources you need?

We Are Here To Help

We have developed a number of resources to help your organizational planning and preparedness through these proven techniques. Whether you are just getting started or you're ready to take your planning to the next level, we can help.

In This Resource

This resource provides information and strategies to support all three components of our MAP strategy.

- Fundraising Priority vs. Strategic Priority
- The seven big questions that you and your team need to answer
- Tips to help you turn your priority into action

Check out our other planning resources so you can MAP out your goals with confidence, or contact us directly if you would like us to set up a tailored planning and preparedness strategy.

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Corporate Screen Checklist

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Fundraising Priorities vs. Strategic Priorities

Unlike strategic priorities, which are typically structured to prioritize the work of subject matter experts related to organizational goals, fundraising priorities, while needing to be linked to strategic priorities, speak to a different audience. What is important to you, may not be important to your donors.

Donors connect emotionally to a cause, and for donor's, it is about how your organization connects to the causes they are passionate about. Demonstrating that your organization is a worthy destination that can create impact and change in support of those causes, requires an entirely different approach.

Defining your fundraising priorities to position your employees, volunteers, and donors to speak about the cause and impact can create champions. It can also increase the ability of your team to demonstrate for donors and potential donors that your organization is a preferred conduit for the impact and change they want to see. Ensuring you have defined your fundraising priorities effectively can position you and your entire team for success.

The Seven Big Questions You Need to Answer

Knowing how to position your fundraising priorities to achieve your goals whether in support of your Annual Fund or a Capital Campaign, comes from understanding how to address the questions that most donors have when they consider your organization. We have learned to start here with these questions.

- Make it Real** - What is the problem and who does it affect?
- Give it Context** - What do we already know?
- Demonstrate Relevance** - Why does it matter?
- What it will Address** - What do we need to know?
- What will it Cost** - How much do you need to raise?
- What it will Change** - What will be done, when, and in what order?
- Define Your Impact** - What will be measured and to whom will it be reported?

Fundraising priorities can shape the dialogue we have with the communities and organizations we serve. Not only do well-defined fundraising priorities help us talk about the current reality, they speak to the future created through participation, influence, investment in shared goals.





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Make it Real

In our experience, defining the problem and the opportunity in ways that can speak to your intended audience is an important first step in the process. However, this needs to be more than facts and figures. You need to tell someone's story and, you need to link their story to the work your organization is doing. Together, this can help you showcase the need, the impact, and the intended change that will occur because of the investment of your donors. Here are some ways to help you make it real.

- Think about who should be the face of your fundraising priority. Who are they? Why?
- Does this individual's story resonate, inform, and inspire?
- How well does it align with the facts and figures?
- Can this fundraising priority speak to a broader audience? How?
- Name it - What's the issue / problem this fundraising priority will address?

Give it Context

Providing context allows you to tell the current reality. This is where your facts and figures are most important. It showcases what is already known and builds trust for donors. Even though most philanthropic decisions are emotional, most donors require some sort of validation. Better that it comes from you.

- What are the areas of focus for your research?
- Do your areas of focus effectively outline the issue your fundraising priority will affect?
- Are the areas of focus easy to understand? (clear, concise, consistent)

Demonstrate Relevance

In our experience, demonstrating relevance is much easier when you go back to your charitable purpose. Why do you exist and what are the societal factors that negatively impact the beneficiaries of your organization from more fully participating in society?

- How does the work of your organization and its partners create meaningful change?
- What are the issues / problems at the core of your mission?
- How does your fundraising priority affect change?





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What it will Address

A crucial element of engaging donors is the ability to clearly articulate how your initiative / program can turn the dial on a specific issues or problem. More importantly, it provides your organization with the ability to help increase donor knowledge regarding information or research you believe they need to know related to the issue / problem and further demonstrate why your organization is a good investment.

- What is the societal issue / problem your program or initiative will address?
- Describe specifically what your initiative / program is doing or will do?
- What are your intended outcomes?
- Who else is involved? (government, agencies, institutions, partners, etc.)

What it will Cost

Donors want to know how far their investment will go. Sharing your goals and how much each program initiative will cost, can increase donor trust that you know what you are talking about and you have a strategy to get there.

- Define your fundraising goal - How will \$\$\$ support these programs?
- What is the cost of delivery for each item / program / initiative?
- What is the total cost / (resources and dollars)?
- How many people does the program / initiative support? (unique / cumulative metrics)?

What it will Change

Defining what will change and in what order provides your organization with the opportunity to share the work of your team and the affect your organization will have on the intended outcomes. Here are some questions to consider.

- How and when will the money be used?
- How many people will this money help?
- How many additional resources will this program / initiative provide?





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Define Your Impact

Although the decision to invest in a cause is typically an emotional decision, it is extremely important for your organization to be transparent about how you will measure and report out on the impact and change that will result from your program / initiative. This provides an opportunity for your organization to match your numbers with your storytelling.

- What information do you intend to share and with who?
- Do your numbers align with your story? If not, why?
- What will be the anticipated net change on the societal issue (cause)?

Tips

This can seem overwhelming at first, but remember you are mapping out your strategy. This will help you speak externally, but it will also help to build support within your organization. Here are some helpful tips to get you and your team started!

- Look to your strategic plan. What are the strategic pillars and organizational goals for the next three to five years?
- Are there any gaps that fundraising can best address?
- How will your priority resonate with current and potential donors?
- Do you have enough information to address the seven big questions?
- Do you need additional support? From whom?
- Share a DRAFT but complete document with management sign-off before seeking board input and approval.
- If you have access to key donors, seek their advice. Remember, if you ask for money you will get advice, if you ask for advice you can get money.
- Seeking board input will increase the likelihood they will support the initiative through their participation, shared influence, and investment. Don't miss the opportunity.
- Flag for your marketing team early. Do your best work within their timelines, so it can be properly branded and supported.

