Fundraising Priorities Checklist

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How do you turn an organizational priority into a fundraising priority that donors and funders have a compelling reason to support?

This checklist helps you understand what turns an organizational priority into a credible fundraising priority and identify what may be missing before developing your Case for Support.

Complete each step in order. Check it when its completion statement is true. Unchecked steps identify areas needing further information, discussion, or decisions.

In This Checklist

- ☐ **Establish the Need and Relevance**
- ☐ **Connect the Priority to a Credible Response**
- ☐ **Measure and Communicate Impact**

Why You Can Trust This Resource

This checklist draws from research and our experience helping organizations establish fundraising priorities and develop credible Cases for Support. It helps teams connect organizational priorities to philanthropic opportunities and identify gaps.

It is a starting point to help you ask questions. A facilitated in-service can help the right people reach agreement and make decisions. An integrated project can develop an approved fundraising priority into a credible Case for Support.

AdvanceU 1st Consultants has over 50 years of combined experience and is a BBB Accredited Business with an A+ rating. We help organizations understand their value, make defensible decisions and develop fundraising opportunities they can deliver.

Contact us if you want to leverage any of our other resources within your organization.

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Establish the Need and Relevance

☐ Make It Real: What is the problem and who does it affect?

Identify the need or opportunity your fundraising priority is intended to address. Consider who is affected, what they are experiencing, and what stories or firsthand accounts could help others understand the issue.

This step is complete when you can clearly describe the need or opportunity, who is affected, and what information or stories help make it real.

☐ Give It Context: What do we already know?

Review the research, data, program information, and experiences that explain the current situation. Distinguish what is supported by evidence from what is assumed or still needs to be established.

This step is complete when you can identify the evidence supporting the need or opportunity and any important gaps in your understanding.

☐ Demonstrate Relevance: Why does it matter and to whom?

Connect the need or opportunity to your organization's mission and priorities. Consider why addressing it matters, what meaningful change could result, and why donors and funders may care about that change.

This step is complete when you can explain why the priority matters to your organization, the people or communities affected, and potential supporters.

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Connect the Priority to a Credible Response

What Will It Address: What does your organization propose to do?

Describe how your organization intends to respond to the identified need or opportunity. Consider the programs, services, or initiatives involved, the intended outcomes and the contributions of other organizations or partners.

This step is complete when you can explain what your organization proposes to do, the outcomes it intends to achieve and who else may be involved.

What Will It Cost: What is the total cost and how much do you need to raise?

Review the full cost of the proposed work, including employees, operations, and other resources required for delivery. Identify existing revenue sources, funding commitments, and the portion that philanthropic support is expected to provide.

This step is complete when you know the full cost of the proposed work, how much funding is already available, and how much needs to be raised through philanthropy.

Identify the activities required to deliver the proposed work, who is responsible, and the anticipated sequence and timing. Consider what must happen before the intended outcomes can be achieved and any dependencies that could affect delivery.

This step is complete when you can explain the planned work, who will carry it out, when it will happen and what needs to be in place for it to proceed.

What Will It Change: What will be done, by whom, when, and in what order?

Why Now? What makes this priority important to address at this time?

Identify what makes action timely. Consider whether the need is growing, circumstances are changing, or an opportunity exists that could be lost through delay. Distinguish genuine urgency from a desire to raise funds.

This step is complete when you can explain why action is needed now and what may happen if it is delayed.

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Measure and Communicate Impact

☐ Measure Your Results: What outcomes show the difference philanthropic support makes?

Identify the results and outcomes that will demonstrate progress toward the intended change. Consider what can realistically be measured, what information is already collected, and how philanthropic support contributes to the intended results.

This step is complete when you have identified the outcomes to measure, the information needed, and how progress will be tracked.

☐ Communicate the Change: How will you share metrics and stories, with whom and through which channels?

Identify who needs to understand the results, including donors and funders. Consider how to combine meaningful metrics and credible stories to communicate what has changed and the difference philanthropic support has made.

This step is complete when you know which results and stories will be shared, with whom, how and when.

Once the checklist is complete, identify what is ready, what needs further information or decisions, and what may need reconsideration. Check alignment with your strategic plan, involve management and your board at the appropriate stages, and consider whether your priority will resonate with donors. Resolve outstanding questions before developing your Case for Support.

AI transparency: AdvanceU 1st Consultants developed the framework and guidance in this resource. We used generative AI to help organize the material and support drafting and editing. We refined and approved the final content, the professional judgment, recommendations, and final editorial decisions are ours.