



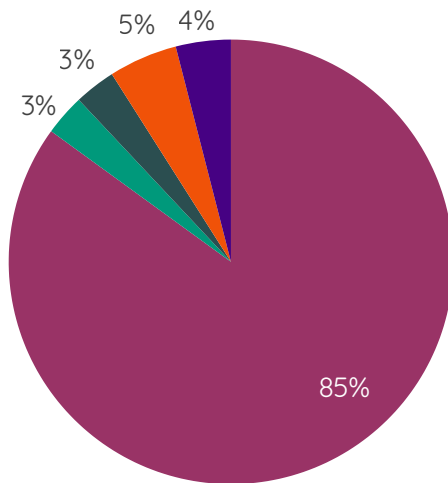
RAISE  
THE BAR

# ✓ Holistic Funding Health Check

You've consulted with your stakeholders and identified strategic priorities.  
In this turbulent and uncertain landscape, are your fundraising and revenue  
approaches ready to realize them?

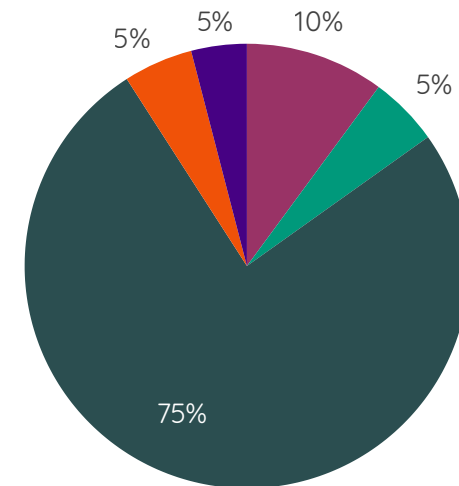
Ensuring your organization's revenue is diverse and not heavily reliant on only one or two sources of funding will help ensure that you are in the best position to weather unpredictable times.

**UNBALANCED REVENUE PROFILE 1**



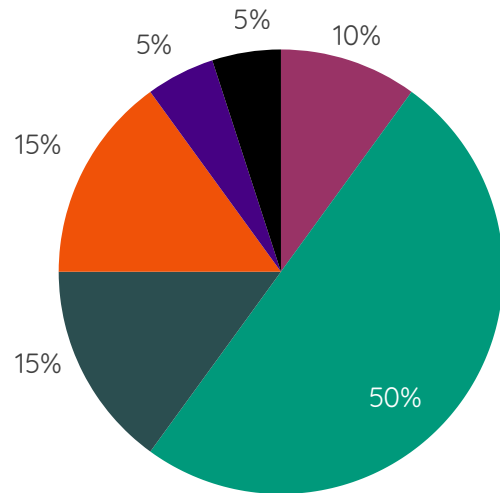
- **Government Grants**
- **Earned revenue**
- **Individual donations**  
(from only a few donors)
- **All other sources**  
(interest, endowment funding, misc. revenue)
- **Fundraising Event(s)**
- **Corporate and Foundation Funding**

**UNBALANCED REVENUE PROFILE 2**



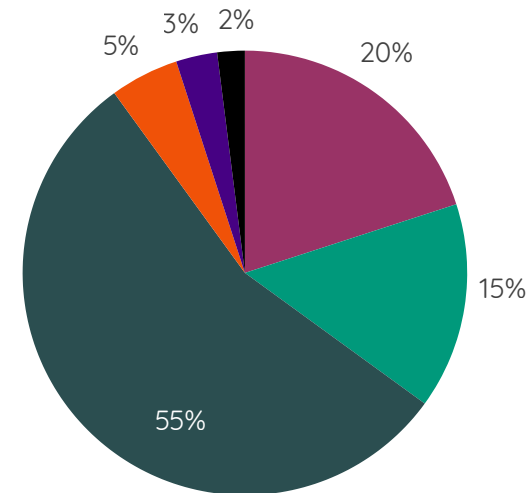
- **Government Grants**
- **Earned revenue**
- **Individual donations**  
(from only a few donors)
- **All other sources**  
(interest, endowment funding, misc. revenue)
- **Fundraising Event(s)**
- **Corporate and Foundation Funding**

### MORE BALANCED REVENUE PROFILE 1



- Government Grants**
- Earned revenue**
- Individual donations**  
(numerous donors, many giving levels)
- All other sources**  
(interest, endowment funding, misc. revenue)
- Fundraising Event(s)**
- Corporate and Foundation Funding**

### MORE BALANCED REVENUE PROFILE 2



- Government Grants**
- Earned revenue**
- Individual donations**  
(numerous donors, many giving levels)
- All other sources**  
(interest, endowment funding, misc. revenue)
- Fundraising Event(s)**
- Corporate and Foundation Funding**

# A HOLISTIC FUNDING CHECKLIST PLAN

<b>Practical Fundraising Goals</b>	<ul style="list-style-type: none"><li><input type="checkbox"/> <b>Are there achievable, agreed-upon fundraising goals that reflect your:</b><ul style="list-style-type: none"><li>• organizational priorities and capacity.</li><li>• audiences/stakeholders.</li><li>• fundraising strategy/ development plan</li></ul></li></ul>
<b>Donor Prospecting, Cultivation, and Stewardship</b>	<ul style="list-style-type: none"><li><input type="checkbox"/> <b>Individual donors:</b> Do you conduct a wealth/propensity data analysis to understand your donors' ability to give and identity cohorts (especially for major gifts or capital campaigns)?</li><li><input type="checkbox"/> <b>Do you have a Donor Cultivation Plan</b> that reflects your needs, strengths, and values?</li><li><input type="checkbox"/> <b>Do you know your “audiences”</b> and the most effective channels to reach them in ways that resonate with their philanthropic interests and matches your mission?</li><li><input type="checkbox"/> <b>Is there an easy-to-implement and effective Donor Engagement &amp; Recognition Program that includes:</b><ul style="list-style-type: none"><li>• VIP Gatherings (Quarterly).</li><li>• Mission Tours (Quarterly to monthly).</li><li>• Naming Opportunities and/or Donor Gift / Card Schedule.</li><li>• Monthly Board Thank You Bank.</li><li>• Thank you, call / text process (internal staff).</li></ul></li></ul>

<p><b>Annual Fund</b></p> <p><b>Individual Donor Program</b></p>	<p><input type="checkbox"/> <b>Do you run an annual fund campaign schedule consisting of these elements?</b></p> <ul style="list-style-type: none"> <li>• A minimum of 4-6 appeal campaigns (March/April for AZGD/Tax Credit in AZ, May/June for Summer Urgent Fund, FY Month 1 for the Board Campaign, November/Giving Tuesday, and December/Year-End, combo solicitation with an existing event).</li> <li>• For more robust fundraising programs, monthly with more complex segmentation strategies.</li> <li>• First Time Donor, Second Time Donor, and Win Back Programs/Strategies.</li> <li>• Multichannel, integrating mail, email, text, phone, social IM, peer-to-peer fundraising</li> </ul>
<p><b>Major Gifts Program &amp; Strategies</b></p>	<p><input type="checkbox"/> <b>Do you have an established major gifts program consisting of these elements?</b></p> <ul style="list-style-type: none"> <li>• Assigned portfolios with identified solicitors.</li> <li>• A moves management strategy.</li> <li>• Unique cultivation, engagement, and recognition strategies designed to offer unique benefits to this donor cohort.</li> <li>• In-person cultivation and solicitation strategies.</li> </ul>

<p><b>Government Grant Strategy</b></p> <p>Appropriate to Your Org</p>	<p><input type="checkbox"/> <b>Do you have the capacity and expertise</b> to research, pursue, write, submit, and manage <u>government</u> grants and contracts (as appropriate)?</p>
<p><b>Corporate &amp; Foundation Giving</b></p>	<p><input type="checkbox"/> <b>Do you have the capacity and expertise</b> to research, pursue, write, submit, and manage <u>corporate and foundation</u> giving opportunities, which typically involve:</p> <ul style="list-style-type: none"> <li>• Relationship-building and stewarding like Major Donors.</li> <li>• Prospect research.</li> <li>• Writing and submitting proposals and sponsorship opportunities.</li> <li>• Volunteer and employee giving opportunities/engagement.</li> </ul>
<p><b>Planned Giving</b></p>	<p><input type="checkbox"/> <b>Do you have a clear Gift Acceptance Policy</b> and an effective evergreen marketing plan to promote basic inclusions and encourage planned giving?</p> <p><input type="checkbox"/> Are you developing partnerships with industry professionals?</p> <p><input type="checkbox"/> Do you have effective leads generation strategies and processes?</p> <p><input type="checkbox"/> Do you offer Planned Giving workshops?</p>

<b>Social Enterprise</b>	<input type="checkbox"/> <b>Does your organization develop unique revenue-generating opportunities such as:</b> <ul style="list-style-type: none"> <li>• Program/ticket fees.</li> <li>• Business ventures, product lines of service, or sales opportunities.</li> <li>• Third Party Payers (e.g., insurance, Education ESAs, etc.).</li> </ul>
<b>Endowment &amp; Investment Income</b>	<input type="checkbox"/> <b>Do you have an informed endowment and investment strategies?</b> Do they maximize your organization's income through dividend and interest payments?
<b>Integrated Marketing &amp; Communications Strategies</b>	<input type="checkbox"/> <b>Is your marketing approach, including tone, timing, and content (all channels) in harmony</b> with your fundraising and revenue generation strategies?  <input type="checkbox"/> <b>Are you utilizing social media marketing and web advertising</b> to drive financial engagement, through services or fundraising strategies?
<b>Fundraising Events “Fit for Purpose”</b>	<input type="checkbox"/> <b>Are your fundraising events mission centric</b> and focused on significant net revenue?  <input type="checkbox"/> <b>Are your events meeting the financial needs of your organization?</b> (If not, why are they considered fundraising events?)  <input type="checkbox"/> <b>Is there a positive correlation between your event expenses and the revenue return on investment (ROI)?</b> What are the opportunity costs of the event?

<b>Unification Streamlining Pooling Resources</b>	<input type="checkbox"/> <b>Does the organization consider ways to acquire / merge/ become part of / fiscally sponsor other programs and organizations</b> as a growth strategy, to strengthen, modernize, and better serve the community?
<b>Board, Staff, &amp; Volunteer Roles</b>	<input type="checkbox"/> <b>Are all board, staff, and volunteers aware of your fundraising and revenue philosophies?</b>  <input type="checkbox"/> <b>Are all staff expected to play a role in revenue generation?</b> Does everyone know their roles and are they held accountable for reaching them?  <input type="checkbox"/> <b>Do volunteers and Board members have a fundraising role</b> at your organization? Are you harnessing their power effectively?
<b>Fundraising Budget</b>	<input type="checkbox"/> <b>Do you have a realistic budget for greatest impact?</b>  <input type="checkbox"/> <b>Do you dedicate enough to make these efforts happen</b> (direct expenses, human resources, professional development, consultants, volunteers)?

Each of these revenue sources grow, evolve, and mature over time. The key is to think about each opportunity and grow funding in different ways to diversify, stabilize, and sustain your organization's financial strength for years to come.

There are many elements to successful fund diversification, no one size fits all.

Every organization has unique strengths and opportunities to become stronger and more stable to better meet their mission.





RAISE  
THE  
BAR

THANK YOU  
for attending  
today's session

## Your Cause is our Because

Running a nonprofit is mission-driven work—but it's also complex.

Whether you're scaling fast, navigating transition, or rethinking fundraising, we help you move forward with clarity and confidence.

BOOK A FREE CONSULT

Jennifer M. Tersigni  
CFRE, CIE, LCC,  
CEO & Lead Consultant

[raisethebarllc.com](https://raisethebarllc.com)

300+  
ORGS SERVED

\$1.2B  
RAISED

