



TOOLKIT FOR FUNDRAISING SUCCESS

Helping Non-Profit Organizations Attract and Secure Funding

Making “the ask” can be nerve-wracking, even for seasoned professionals. In this interactive session, you'll learn how to confidently ask donors for impactful gifts.

We'll cover key steps before, during, and after the ask, strategies for handling rejection, and tips for crafting a compelling written proposal to boost your chances of success.



TAGLINE TAKEAWAYS

- **Know Your Audience, Having Social Awareness:** What makes your funder tick. What areas of focus are meaningful to them, not just you? Be sensitive to the climate of their organization.
- **Personalize each ask – one-size doesn't fit all:** Do your research on what different funders' focus areas are, the size of gifts they typically give, and the benefits they prefer.
- **Know your Elevator Speech:** Update it, practice it, believe it. You have 30 seconds to hook your funder. What you say and how you say it matters.
- **Appropriate follow-up is key:** Funders appreciate transparency and communication but in a time appropriate manner.
- **Remember the Ugly "Dear Friend, or wrong name!"** Cutting and pasting incorrect details.
- **Build your case – data and impact speak volumes:** Show me, don't tell me. Make your mission come to life with real stories, real people, real impact.





FUNDRAISING BEST PRACTICES CHECKLIST

- ✓ **Know Your Mission:** Can you clearly articulate your organization's purpose in one sentence?
- ✓ **Research Funders:** Have you identified funders whose interests align with your mission?
- ✓ **Tailor Your Approach:** Is each proposal customized addressing the goals of the funders?
- ✓ **Create an Impactful Narrative:** Do you have a compelling story about why your cause matters?
- ✓ **Engage Funders:** Are you regularly updating funders on progress and outcomes?
- ✓ **Build Relationships:** Are you engaging in continuous relationship-building and stewardship?
- ✓ **Follow Up:** Do you have a clear follow-up plan after submitting your proposal?



ELEVATOR SPEECH WORKSHEET

**Craft a compelling elevator pitch for funders.
It should include the following components:**

- **Introduction:** Who are you and what does your organization do?
- **The Need:** What problem is your organization solving?
- **The Impact:** How does your organization create change?
- **The Ask:** What do you need from the funder?
- **The Vision:** What are the long-term goals of your organization?

Worksheet Prompt:

Write your 30-second pitch below using the sections outlined above.
Practice delivering it to a partner or in front of a mirror.





FUNDRAISING PROPOSAL TEMPLATE

It seems simple, but I have read hundreds of proposals that were missing one or more of these key elements.

- **Organization Overview:** Simply put, who are you and what do you do?
- **The Problem:** Why do you need funding? What would happen to the people you serve without your organization?
- **Solution:** How will your organization address this issue with your funder's support?
- **Outcomes/Impact:** Don't forget to follow up with your funder & show how their donation made a difference.
- **Budget:** Review your total budget vs. your ask. Make sure these numbers align.
- **Funding Request:** Include a specific ask in your proposal? Not sure? Ask your funder!
- **Call to Action:** What is your implementation plan?



DONOR STEWARDSHIP TIPS

Rules we know, but rarely put into place. These are key to a successful ask!

- **Acknowledge donations promptly:** Send a personalized thank-you note within 48 hours. Don't overthink this-it can be a form letter with a handwritten "Thank you!"
- **Report on impact:** Keep donors updated on how their contributions have made a difference. An "Ugly" is not reaching out to your donor until 365 days later asking for the gift again.
- **Invite them to events:** Engage donors by inviting them to your organization's events or activities- Comp their tickets if you can! Get donors in at the ground level and grow that relationship.
- **Personalize communication:** Tailor your messages based on the donor's history and interests. Do your research and craft a message or ask specifically for them. This shows interest in creating a relationship with your donor as opposed to just asking for money.





BASIC FUNDER RESEARCH TOOLS

- The Community Foundation
- Local Chamber of Commerce
- Collect other invites, annual reports, follow social media sites etc.
- Join other non - profit committees or boards of directors
- Ask!

FUNDRAISING CALENDAR

Post-Fundraising: Acknowledgments, Stewardship, Follow-up, plan for next year events

- A visual calendar template (both digital and physical) where participants can plan their fundraising campaigns throughout the year. It should include:
 - **Pre:** Research, proposal writing, strategy planning
 - **Active:** Campaign launches, donor meetings, events
 - **Post:** Acknowledgments, stewardship, follow-up





Victoria Hostig

NEXT STEPS

**Resources and workshops
to further development:**

**Everyone is a Fundraiser:
Even You!**

**Networking 101:
Successful Growth of your
Network**

**Tips & Tricks:
For making an impactful ask**

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