**A Practical Guide to Fund Development – Self-Assessment Worksheet**

*B-PAP Grantee Convening – Wichita (July 17, 2025)*

Use this worksheet to reflect on your organization’s fund development capacity across six key domains. For each statement below, rate your current status on a scale from **1 (needs strengthening)** to **5 (excellent)**. Jot down notes or examples to support your rating. *(Remember, there are no “wrong” answers – the goal is to spark honest discussion and ideas for improvement)*

After assessing all six areas, conclude by identifying one practical **30-day experiment** or next step your team will take to boost your fund development capacity.

**1. Mission Clarity**

* **Our mission is clear, compelling, and guides our fundraising efforts.**
**Rating (1–5):** \_\_\_\_     **Notes:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Everyone on our team (staff and board) can articulate our mission and the impact of our work.** *(Is your team aligned and able to tell others what you do and why it matters?)*
**Rating (1–5):** \_\_\_\_     **Notes:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Our programs and fundraising strategies align with our mission and values.**
**Rating (1–5):** \_\_\_\_     **Notes:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**2. Data Infrastructure**

* **We have systems in place (database or spreadsheets) to track donor information and donations.** *(A good donor management system or CRM helps maintain a centralized record of supporters.)*
**Rating (1–5):** \_\_\_\_     **Notes:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **We regularly use data (e.g. giving history, campaign results) to inform our fundraising strategies.** *(Tracking metrics like donor retention or fundraising results helps with continuous improvement.)*
**Rating (1–5):** \_\_\_\_     **Notes:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **We have clear processes to acknowledge contributions and keep donor records up-to-date.** *(For example, promptly sending thank-you letters and updating donation logs.)*
**Rating (1–5):** \_\_\_\_     **Notes:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**3. Partnership Reach**

* **We collaborate with other organizations or community groups to broaden our reach and resources.** *(Strategic collaborations can help us reach a wider audience and leverage each other’s networks.)*
**Rating (1–5):** \_\_\_\_     **Notes:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Our organization has relationships with key community leaders, allies, or businesses who support our cause.** *(These partners can champion our mission or open doors to new funding opportunities.)*
**Rating (1–5):** \_\_\_\_     **Notes:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **We engage partners in our fundraising efforts (e.g. co-hosting events, sponsorships, referrals).**
**Rating (1–5):** \_\_\_\_     **Notes:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**4. Donor/Funder Pipeline**

* **We maintain a list of prospective donors and funders and update it regularly.** *(It’s important to have a pool of potential supporters – individuals, businesses, foundations – identified for outreach.)*
**Rating (1–5):** \_\_\_\_     **Notes:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **We have a plan to cultivate new donors and to steward existing ones for the long term.** *(This could include regular communication, meetings, or thank-you touches to build relationships.)*
**Rating (1–5):** \_\_\_\_     **Notes:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Our funding comes from a variety of sources (not overly reliant on any single donor or grant).** *(Diversifying funding – exploring new donors, grants, partnerships, or revenue streams – helps ensure financial stability.)*
**Rating (1–5):** \_\_\_\_     **Notes:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**5. Storytelling Tools**

* **We have compelling success stories or examples that demonstrate our impact and inspire support.** *(Storytelling is at the heart of effective fundraising – personal narratives and testimonials can connect emotionally with donors.)*
**Rating (1–5):** \_\_\_\_     **Notes:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Our communication materials (website, brochures, social media) effectively tell our story and mission.** *(They clearly communicate who we are, what we do, and why it matters to the community.)*
**Rating (1–5):** \_\_\_\_     **Notes:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **We tailor our message for different audiences, showing donors/funders the tangible impact of their support.** *(For example, using data and visuals for some funders, or heartfelt stories for community donors.)*
**Rating (1–5):** \_\_\_\_     **Notes:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**6. Adaptive Leadership**

* **Our leadership (staff and board) encourages trying new fundraising approaches and learning from the results.** *(Adaptive leaders empower teams to experiment, take calculated risks, and learn from successes and failures.)*
**Rating (1–5):** \_\_\_\_     **Notes:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **We regularly reflect on our fundraising efforts (what’s working or not) and adjust course as needed.** *(In fundraising, flexibility and timely adjustments are key when things don’t go as planned.)*
**Rating (1–5):** \_\_\_\_     **Notes:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **We invest in building our team’s fundraising skills and knowledge.** *(For example, through training, mentoring, or sharing best practices – fostering a culture of continuous improvement.)*
**Rating (1–5):** \_\_\_\_     **Notes:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**30-Day Experiment – Next Step**

**Based on our self-assessment above, one practical action we commit to take in the next 30 days to strengthen our fund development capacity is:**

*(Describe a small experiment or next step your team will take — for instance, trying a new fundraising idea, improving a process, or reaching out to a partner — and how you will know if it’s making a difference.)*

**Together, let’s commit to this 30-day experiment and plan to share our progress!**

**Sources:** The self-assessment domains and prompts are informed by nonprofit capacity-building best practices and fundraising literature:
[saadandshaw.com](https://saadandshaw.com/capacity-infrastructure/#:~:text=1,the%20general%20public%2C%20and%20amongst)
[texascasa.org](https://texascasa.org/wp-content/uploads/2020/10/Part-2-Texas-CASA-Growth-Planning-Toolkit.pdf#:~:text=positively%20in%20the%20past%20to,number%20of%20active%20board%20members)
[nonprofitfundraising.com](https://nonprofitfundraising.com/top-9-nonprofit-management-tips-for-2025/#:~:text=6)
[linkedin.com](https://www.linkedin.com/pulse/embracing-change-why-adaptive-leadership-essential-rodger-moran-mba-g2swc#:~:text=internal%20growth.%20Non,ultimately%20enhancing%20the%20organization%E2%80%99s%20impact), adapted for grassroots organizations.