Section 2 Action Step - Diversification

1. Government Grants (public funding): _____%
2. Foundation/Corporate Giving (private funding): _____%
3. Individual Giving (including Board members): _____%
4. Other (events, earned revenue, etc.): _____%

What stands out to you?

_____

_____

_____

Where is your biggest risk?

_____

_____

_____

Section 3 Action Step – Readiness Checklist

Agency: _____ Completed by: _____

Private fundraising means asking individuals, businesses, or foundations to support your work. This checklist helps you see what is already in place and what to build next.

Mark one box for each statement: Yes = we do this now; Somewhat = we have started; No = we do not do this yet. You do not need a formal fundraising department to use this checklist.

Section 1: Know what you are raising money for

☐ **Yes** ☐ **Somewhat** ☐ **No** We can name one or two clear needs to fundraise fore.
☐ **Yes** ☐ **Somewhat** ☐ **No** We know about how much money each need requires.
☐ **Yes** ☐ **Somewhat** ☐ **No** We can explain in plain language what a donation would make possible.
☐ **Yes** ☐ **Somewhat** ☐ **No** We can share a real result or story that shows our work matters.

Section 2: Have people ready to help

☐ **Yes** ☐ **Somewhat** ☐ **No** One person is responsible for keeping fundraising work on track.
☐ **Yes** ☐ **Somewhat** ☐ **No** Our director is willing to meet with supporters and ask for gifts.
☐ **Yes** ☐ **Somewhat** ☐ **No** Our board understands how it can help, such as giving, making introductions, or thanking donors.
☐ **Yes** ☐ **Somewhat** ☐ **No** Staff can make time to respond to donors and follow up on promises.

Section 3: Make giving easy

☐ **Yes** ☐ **Somewhat** ☐ **No** Someone can quickly find out how to donate to us.
☐ **Yes** ☐ **Somewhat** ☐ **No** We have a working and secure way to accept online gifts.
☐ **Yes** ☐ **Somewhat** ☐ **No** We can accept a check and record who sent it and what it is for.

Section 4: Keep good records

☐ **Yes** ☐ **Somewhat** ☐ **No** We keep donor names, contact info, and gift amounts in one place.
☐ **Yes** ☐ **Somewhat** ☐ **No** We record when we contact someone and what follow-up we promised.
☐ **Yes** ☐ **Somewhat** ☐ **No** We can tell which donors have given before and when they last gave.
☐ **Yes** ☐ **Somewhat** ☐ **No** Only the right people can access donor and payment information.

Section 5: Thank donors and stay in touch

☐ **Yes** ☐ **Somewhat** ☐ **No** We thank donors soon after they give.
☐ **Yes** ☐ **Somewhat** ☐ **No** Our thank-you messages say what the gift supports.
☐ **Yes** ☐ **Somewhat** ☐ **No** We share updates about the difference donations make.

Section 6: Ask and learn

☐ **Yes** ☐ **Somewhat** ☐ **No** We have a short list of people or businesses who may want to support us.
☐ **Yes** ☐ **Somewhat** ☐ **No** We have a simple plan for when and how to invite people to give.
☐ **Yes** ☐ **Somewhat** ☐ **No** We keep track of who was asked, their response, and the next step.
☐ **Yes** ☐ **Somewhat** ☐ **No** We check what worked and decide what to improve next time.

Section 4 Action Step – Potential Funding Sources

Agency or program: _____

Write the names of people, organizations, or opportunities you could explore in each box. These are possibilities, not confirmed commitments. Add a first step for the most promising leads at the bottom.

Individuals **Past donors, volunteers, community members** _____ _____ _____	**Foundations** **Local, family, or community foundations** _____ _____ _____	**Businesses** **Sponsorships, gifts, employee giving** _____ _____ _____
	YOUR AGENCY **Name:** _____ **Goal: $**_____	
Events **Fundraising events and peer campaigns** _____ _____ _____	**Community groups** **Faith groups, clubs, associations** _____ _____ _____	**Other support** **In-kind gifts, matching gifts, other** _____ _____ _____

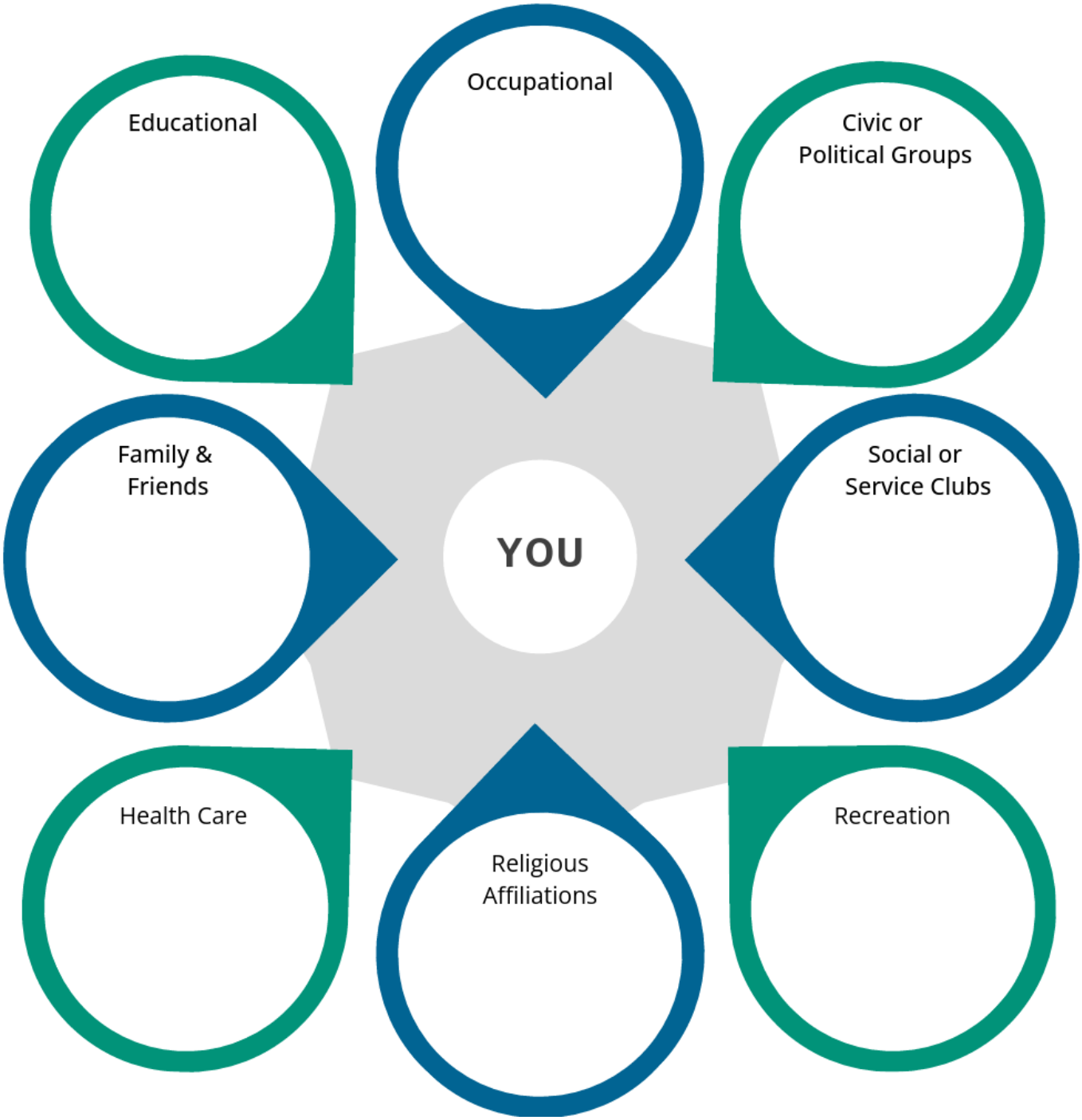
Which two possibilities should you explore first?

1. _____ **First step:** _____

2. _____ **First step:** _____

Section 5 Action Step – Relationships Mapping

Write the names of a few people you know in each category who may be willing or able to make a contribution to help our community.



Section 6 Action Step – Rewrite the Ask

The paragraph below is a fictional fundraising request. It explains that the program needs support, but it does not tell a donor exactly what their gift would accomplish. Rewrite it into a clear, compelling ask.

Wisconsin Badger Community Action Agency needs help to feed families in Ope County. Food costs are rising and our funding doesn't cover everything we need. We spend $56,000 on our Food for All Program, but expenses are over $70,000 per year. Food is a basic need and everyone in Ope County deserves to eat healthy. That's why we provide lots of community members with food every week. This food includes fruits, vegetables, whole grains, protein, dairy, and other essentials to meet nutritional needs. The problem is we sometimes don't have enough money to feed everyone. You can make a difference today! Thank you for your consideration.

Outline for rewritten ask:

1. **Open with a specific need.** Who needs help in Ope County, and what is happening?

2. **Show the need with data.** Include the program's funding gap and at least one other statistic.

3. **Make it personal.** Tell a brief fictional story about one family and how Food for All helps.

4. **State a SMART goal.**

5. **Make a direct ask.** How much are you requesting, and what will the gift pay for?

6. **Put it together in one short, donor-facing paragraph or two.**

_____

_____

_____