Fund Development Self-Assessment

A program check to run once the conditions are in place

Instructions: Take twenty minutes. There are no right or wrong answers; your starting point is yours alone. Complete Part A alongside whoever owns your budget so the numbers are real, rate Part B honestly, and use Part C to commit to a single action you can finish this month.

Part A: Your Current Funding Picture

List your organization's current revenue sources and the share of total budget each represents. Include everything, not only grants.

Source / Program Name	Type	Annual Amount	% of Budget	Renewal or End Date
	Government, federal	$		
	Government, state	$		
	Government, local	$		
	Foundation	$		
	Corporate	$		
	Individual giving	$		
	Earned revenue or fees	$		
	Other	$		
TOTAL		**$**	**100%**	

Your single greatest funding vulnerability right now

What share of your budget renews on someone else's decision in the next twelve months?

Part B: Where Are You on the Five Components Today?

Rate your organization's current status for each component. Be honest; this is for your planning, not for grading.

1. Case for Support: *A written, compelling narrative of who you are, the problem you address, and the impact you make, in language a stranger would understand*

☐ 1 Not yet started | ☐ 2 Early stages | ☐ 3 Partially in place | ☐ 4 Mostly in place | ☐ 5 Strong / complete

Notes / what is working or missing

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2. Funding Goals & Targets: *Specific, time-bound revenue targets, with a target funding mix across multiple source types rather than a single number handed down from the budget*

☐ 1 Not yet started | ☐ 2 Early stages | ☐ 3 Partially in place | ☐ 4 Mostly in place | ☐ 5 Strong / complete

Notes / what is working or missing

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3. Donor & Funder Identification: *A documented list of prospects with alignment scores, deadlines, and status tracking that more than one person can read and use*

☐ 1 Not yet started | ☐ 2 Early stages | ☐ 3 Partially in place | ☐ 4 Mostly in place | ☐ 5 Strong / complete

Notes / what is working or missing

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4. Cultivation & Stewardship: *A plan for building and sustaining donor and funder relationships across the full relationship cycle, not only at the point of the ask or the report deadline*

☐ 1 Not yet started	☐ 2 Early stages	☐ 3 Partially in place	☐ 4 Mostly in place	☐ 5 Strong / complete

Notes / what is working or missing

5. Infrastructure & Accountability: *A named staff lead, a tracking system for prospects, deadlines, and reporting, and board-level accountability for fund development*

☐ 1 Not yet started	☐ 2 Early stages	☐ 3 Partially in place	☐ 4 Mostly in place	☐ 5 Strong / complete

Notes / what is working or missing

Part C: Your #1 Priority Action

Based on your ratings above, where is the biggest gap? What one action, taken in the next 30 days, would most move your fund development program forward?

My #1 priority action

Who will own this action at my organization?

I will complete this by (date)

The biggest obstacle I anticipate

One resource or support I need to move this forward

Remember: A one-page fund development plan is infinitely better than none. You do not have to build this alone, and neither does your organization. Start now, start small, and build from there.

Companion tool: if the components above are hard to rate because no one clearly owns the work, start with the Atrómitos Culture of Philanthropy Self-Assessment. Culture comes first. This is the program you build on top of it.