

# FUNDRAISING PRIMER

Your first steps  
in successful  
fundraising



**Could your:**

- ✓ **Community benefit from additional services?**
- ✓ **Programs be strengthened with additional funding to support your efforts?**
- ✓ **Agency utilize support to expand your funding sources?**

For far too long your agency, like many others, has relied solely on federal and state funding. You also know those grants are erratic and that having a strong donor relations program will provide added sustainability to your programs and your agency.

It's time you take charge of your funding stream, and it's a lot easier than you may think. Count on Wipfli to get you started with the Fundraising Primer. It's your first step to successful fundraising!

Learn more at **[wipfli.com/startfundraising](http://wipfli.com/startfundraising)**

**[wipfli.com/ngp](http://wipfli.com/ngp)**  
**888.876.4992**

**WIPFLI**<sup>LLP</sup>  
CPAs and Consultants



# Fundraising Primer

## Your first steps in successful fundraising

Every agency can put additional funding to good use. With Wipfli's Fundraising Primer, you will gain insights about where your agency's current fundraising efforts are, what is possible, and what needs to be done to start seeing donation dollars come in the door to better help your programs and community.



### PHASE 1: CAPACITY ASSESSMENT

**The Capacity Assessment is designed to evaluate current fundraising methods, tools, policies, and procedures, as well as the current understanding and vision of what fundraising objectives and roles are within your agency.**

**The Capacity Assessment includes:**

- Board Fundraising Readiness Survey with guidance on how to lead your agency's fundraising efforts.
- Interviews with program directors, staff, and/or donors, designed to identify key opportunities for fundraising, as well as any observed gaps or roadblocks.
- Interviews with agency leadership to create a gift processing and donor acknowledgment policy and to add fundraising language to agency job descriptions and evaluations.
- Assessment of messaging, storytelling, or marketing materials.
- Assessment of donor experience, with suggestions for improvement.
- Assessment of current fundraising software or suggestions of software to purchase.
- Written report for suggested next steps and opportunities for improvement.



### PHASE 2: BOARD TRAINING

**Board Training is designed to give your key stakeholders strategies for getting started and moving the needle forward. Board Training includes:**

- Interactive discussion with your board chair on how to tell your agency's story.
- Interactive discussion with your board chair on effective ways of finding donors.
- Recorded webinars for your board, staff, and volunteers.

Let's see what's possible for your community when you find alternative ways to fund your program. Get started today at

**[wipfli.com/startfundraising](http://wipfli.com/startfundraising)**



**Contact us today:**

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