Fundraising tactics

Cheat Sheets

Individual Giving

Annual donations, monthly donors, major gifts, planned giving

Funding Flexibility: HIGH - Flexible, unrestricted revenue that builds long-term independence.

Advantages

Financial Predictability: Can become predictable over time, especially through monthly giving channels.

Deep Ownership: Builds long-term community ownership around your core mission.

High-Value Returns: Major gifts and planned giving can secure high-value capital and long-term positioning.

Best Fit When Your Organization Has:

Clear Messaging: A strong case for support, clear messaging, and trusted stories of impact.

Basic Systems: A CRM or basic donor tracking setups alongside tax receipting capacity.

Active Outlets: Communications channels ready to deploy content (email, social media, website).

Stewardship Bandwidth: Capacity for relationship maintenance and leadership involvement for major gifts.

Reality Check

• Takes dedicated time to build from the ground up.

• Donor retention matters just as much as new acquisition.

• Progress is harder if the organization has low visibility or weak stewardship systems.

• Works best when your organization is a registered charity (can issue tax receipts to donors)

Overall Readiness Score

[1: No Capacity]   [2: Low]   [3: Medium]   [4: High]   [5: Fully Ready]

Foundation Grants

Family or private foundations, corporate foundations, community foundations

Funding Flexibility: MEDIUM — Frequently restricted to specific projects or pilots.

Advantages

Substantial Influx: Capable of bringing in large, impactful lump-sum gifts.

Strategic Testing: Great fit for funding pilots, driving growth, and executing specific projects.

Local Alignment: Community foundations can step up as exceptionally strong local allies.

Best Fit When Your Organization Has:

Structured Programs: Total program clarity with well-defined goals, activities, and measurable outcomes.

Technical Skills: Strong grant writing capacity backed by good funder research and relationship management.

Operational Controls: Established budgeting, grant management, reporting, and compliance systems.

Validation: Evidence of community need, verified impact data, and board support for funder cultivation.

The Reality Check

- Funding is frequently restricted to exact line items.
- Highly competitive, time-intensive, and demands heavy reporting that can strain small teams.
- Can create risky operational dependency if overused as a primary funding pillar.

Overall Readiness Score

[1: No Capacity]   [2: Low]   [3: Medium]   [4: High]   [5: Fully Ready]

Government Funding

Grants, service agreements, wage subsidies

Funding Flexibility: LOW — Usually strictly tied to specific public policies or rigid service agreements.

Advantages

Scale and Stability: Can provide exceptionally large, stable, and long-term funding streams.

Core Support: Service agreements can fund core program delivery; wage subsidies lower staffing costs.

Institutional Legitimacy: Public contracts add significant scale and legitimacy to your operations.

Best Fit When Your Organization Has:

Rigorous Infrastructure: Highly developed administrative systems with ironclad financial controls.

Compliance Readiness: Team capacity to handle grueling reporting, tight deadlines, and external audits.

Program Execution: High delivery readiness, clear policies, structural governance, and a proven track record.

The Reality Check

- Administrative reporting and compliance burdens can be incredibly heavy.
- Funds may face delays or become tied to shifting politics and policy changes.
- Can heavily stretch teams if full cost recovery mechanisms are weak within the agreement.

Overall Readiness Score

[1: No Capacity]   [2: Low]   [3: Medium]   [4: High]   [5: Fully Ready]

Corporate Partnerships

Donations, sponsorships, employee giving, cause marketing

Funding Flexibility: MEDIUM — Can be flexible when designed as general support and not tied to project-specific reporting.

Advantages

Multi-Resource Influx: Unlocks cash alongside in-kind support, product donations, and professional networks.

Targeted Visibility: Sponsorships offer great backing for major events and visibility campaigns.

Recurring Alignment: Employee giving campaigns build predictable, recurring donor support.

Best Fit When Your Organization Has:

An Appeal Package: A crisp, professional partnership offer or structured sponsorship tier package.

Assets and Outlets: A strong brand, polished materials, and audience or presence that matters to businesses.

Stewardship Focus: Staff time dedicated to relationship cultivation and clear gift acceptance guidelines.

The Reality Check

- Highly transactional unless actively nurtured into a deeper relationship over time.
- Risks mission drift if values alignment with the corporation is weak.
- Sponsorship arrangements are frequently short-term unless intentionally renewed year-over-year.

Overall Readiness Score

[1: No Capacity]   [2: Low]   [3: Medium]   [4: High]   [5: Fully Ready]

Events and Community Support

Peer-to-peer fundraising, community drives, major fundraising events

Funding Flexibility: HIGH — Revenue is mainly flexible, unrestricted funding.

Advantages

Public Momentum: Rapidly builds brand visibility, public momentum, and community buy-in.

Acquisition Funnel: Prime method to source new donors, champions, and active volunteers.

Dual-Purpose Engagement: Combines immediate fundraising with ongoing stewardship and awareness.

Best Fit When Your Organization Has:

Logistical Power: Volunteer and community coordination capacity paired with event planning systems.

Promotion Channels: Strong marketing support paired with a clear community call to action.

Digital Tools: Functional tools for registration, donation processing, and automated follow-up.

P2P Scaffolding: User-friendly fundraising pages, templates, and hands-on champion support.

The Reality Check

- Can be incredibly staff-heavy and resource-intensive relative to net financial return.
- Event revenue is volatile and highly unpredictable.
- One-time events don't automatically convert into long-term income without strong follow-up.

Overall Readiness Score

[1: No Capacity]   [2: Low]   [3: Medium]   [4: High]   [5: Fully Ready]

Earned Income

Fee-for-service models, social enterprises, program fees, licensing

Funding Flexibility: HIGH — Highly flexible revenue that reduces dependency on erratic grant cycles.

Advantages

Resilience Catalyst: Builds long-term financial resilience through predictable customer transactions.

Leveraged Assets: Excellent fit for groups with proprietary training, tools, or specialized services.

Scalable Impact: Licensing or franchising allows you to scale impact without delivering everything directly.

Best Fit When Your Organization Has:

A Marketable Asset: A clearly monetizable service, product, curriculum, or niche expertise.

Commercial Mindset: A business mindset, market understanding, and a clear pricing model.

Operational Machinery: Strong delivery capacity, quality control, and systems for contracts and invoicing.

Legal Shielding: Total clarity on local legal and financial rules regarding charity law and tax regulations.

The Reality Check

- Requires deep business discipline, not just a good idea.
- Can pull focus from core mission if designed poorly or managed too commercially.
- Charity law issues need careful navigation depending on jurisdiction and commercial activity.

Overall Readiness Score

[1: No Capacity] [2: Low] [3: Medium] [4: High] [5: Fully Ready]

Membership

Alumni networks, giving circles, subscriber communities

Funding Flexibility: HIGH — Predictable, flexible, recurring revenue—powerful without tax-receipting capacity.

Advantages

Reliable Retention: Generates predictable, stable, and recurring revenue over time.

Deep Loyalty: Cultivates strong user loyalty, deep connection, and ongoing community buy-in.

Strategic Fit: Perfectly suited for alumni networks, professional groups, and tight donor circles.

Best Fit When Your Organization Has:

Value Proposition: A crystal-clear value proposition with benefits members actually care about.

Management Infrastructure: Database/CRM or subscriber tools to track renewals and engagement.

Relational Bandwidth: Staff time for relationships, consistent programming, content, or access opportunities.

The Reality Check

- Incredibly hard to sustain if core membership benefits remain vague or poorly executed.
- Can become highly admin-heavy to track renewals, churn, and benefits delivery.
- Rarely works if there is no genuine sense of community belonging or practical utility.

Overall Readiness Score

[1: No Capacity]   [2: Low]   [3: Medium]   [4: High]   [5: Fully Ready]

Funding Partnerships

Collaborative and pooled funding, re-granting, revenue sharing, resource sharing

Funding Flexibility: MEDIUM to HIGH — Helps smaller organizations access larger institutional pots.

Advantages

Scale Opportunities: Unlocks funding scales and proposals impossible to execute alone.

Cost Efficiency: Resource or infrastructure sharing significantly lowers overhead costs.

Ecosystem Authority: Builds collective credibility; perfect for place-based or systems-change initiatives.

Best Fit When Your Organization Has:

Relational Trust: Deep, existing institutional partnerships built on explicit trust.

Shared Governance: Clear agreements detailing roles, shared governance, and financial split-ups.

Coordination Capacity: High communication capacity for cross-partner tracking and mutual accountability.

The Reality Check

- Operations can get messy rapidly if individual roles are left unclear.
- Shared funding does not automatically guarantee shared power or equal equity.
- Inter-organizational coordination takes considerable time; vague expectations create tension.

Overall Readiness Score

[1: No Capacity]   [2: Low]   [3: Medium]   [4: High]   [5: Fully Ready]

Investments

Interest income, endowments, capital market investments

Funding Flexibility: HIGH — Generates passive, completely unrestricted operational income.

Advantages

Passive Security: Generates consistent, passive financial returns over long horizons.

Generational Stability: Properly managed endowments protect long-term institutional stability.

Diversification: A premium component within a mature, fully diversified funding mix.

Best Fit When Your Organization Has:

Excess Capital: Liquid capital or designated reserves explicitly available to invest.

Fiduciary Stewardship: Board oversight, investment policy, and solid risk management.

Expert Advisory: Clear rules on endowed restrictions and access to trusted financial advisors.

The Reality Check

- Strictly a long-term capital preservation play, not a short-term fundraising solution.
- Requires significant money to make money.
- Market risk always exists; largely irrelevant for early-stage or cash-strapped operations.

Overall Readiness Score

[1: No Capacity] [2: Low] [3: Medium] [4: High] [5: Fully Ready]