

## Introduction to Fundraising Planning: Taking Stock of Your Strengths

# An Assets Inventory

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### Values, Vision, and Mission

1. What values do you hold that you associate with your organization?
  
  
  
2. How would the world be different on the day that you could say that your mission is accomplished?
  
  
  
3. What is the mission of your organization?

### Accomplishments

4. What are your ongoing core projects or programs and what are the results or outcomes that you can point to as a result of these efforts?

Projects/Programs	Results/Outcomes
a.	
b.	
c.	
d.	

5. What are the core competencies (e.g., skills and abilities) that enable your organization to succeed in these efforts—personal or organizational or both?
  
  
  
6. How do you endeavor to measure your effectiveness? (e.g., statistics; letters of appreciation, testimonials, assessments by outside bodies, awards and honors, etc.)
  
  
  
7. Do you attract any media visibility? If yes, in which media outlets?

### **Board and Staff History**

8. What are some of the key qualifications and talents of your past and current board members and staff?

9. Have board or staff members received any recognition of their talents and contributions?

10. What percentage of your board members make financial contributions to your organization?

### **Organizational History**

11. How long has your organization been in existence?

12. What distinguishes your past work from that of similar organizations? List the specific ways in which your work differs from theirs.

13. What recognition has your organization as a whole received since its inception? (e.g., invitations to speak at conferences, workshops, public rallies, and legislative hearings; certificates of commendation; quotations in scholarly or popular journals and magazines; letters of appreciation; etc.)

### **Funding History**

14. Name the institutions that support your work.

a. Foundations:

b. Corporations and businesses:

c. Religious sources:

d. Associations of individuals:

e. Others (e.g., labor unions, federations, governmental agencies, etc):

15. How many individuals pay dues, make contributions, or do both to support your work?  
What percentage renew their support each year?

16. How diversified is your financial base? For example, how many different sources extend support to you? What percentage of your total income does each comprise?

**Other:**