

Money Story Checklist

1. I know **THEIR** Money Story

- Major Donors
- Executive Director
- Board Chair
- Finance Department and/or Committee
- Program Staff
- Fundraising Department and/or Committee
- My Own

2. Our Communication includes a **CLEAR** Money Story

- How we help one person + what it takes to help
- Shows progress toward our next \$ milestone
- Inform about “what it takes” to grow & vision forward
- Relationship-building, inspiring, “specific” examples

3. Continually **INSPIRE** Participation

- We show the positive impact of recent contributions
- Thanking is personal, timely and feels great
- Our mission is deeply infused into our fundraising
- It's simple and enjoyable to make a contribution

Action Plan: Clarifying Our Money Story

(To be most effective: ONLY choose up to 3 NEW actions at a time)

Action	Measurable Target	By When	Process/System	Partner(s)