EXCELEVATE

Funder Prospecting & Alignment Checklist

A STRATEGIC ASSESSMENT TOOL

Funding strategy is not just about hunting new opportunities; it's about pruning high-risk dependency and refining your portfolio. This Assessment helps your leadership team rank both new prospects and existing funding awards based on **mission alignment** and **organizational capacity** to manage overall risk.

Use the 3-Point System:

- **3 Points:** Perfect Fit / Strong Advantage (Maximizes capacity).
- **2 Points:** Acceptable Fit / Manageable Risk (Requires monitoring).
- **1 Point:** Poor Fit / High Risk / Requires External Support (Avoid/Scale back)

Part 1: Strategic & Mission Alignment

(FUNDER-SIDE FIT)

Goal: Determine how well the funder's priorities fit our mission.

Question	Rank (1-3)	Scoring Notes
1. Mission Match: How closely does their stated mission match our core program?		3=Explicitly stated/Prior funder. 1=Tangentially related/New program area.
2. Geographic Priority: How specific is their focus on our service area?		3=County/City specific. 1=National/Global (higher competition).
3. Financial Range: Is our ask within the typical high-end of their past award sizes?		3=Matches their average awards. 1=Significantly outside their norm (too high or too low).
4. Funding Type: Do they typically fund the type of support we need (e.g., General Operating vs. Project)?		3=Open to General Operating Support/Unrestricted. 1=Strictly Project/Capital.
Total Score (Part 1):		

Part 2: Operational & Capacity Fit

(INTERNAL-SIDE RISK)

Goal: Determine how much internal capacity and financial risk this opportunity requires.

Question	Rank (1-3)	Scoring Notes
5. Program Management: How well does the required funding fit an existing program/project with current capacity?		3=Perfect match to established program. 1=Requires development of a brand new program.
6. Reporting Burden: How complex is the required reporting (e.g., 4+ reports, strict metrics, detailed accounting requirements)?		3=None 2=Simple/less than 2 per year narrative/financial. 1=Complex, high-frequency, new compliance metrics.
7. Payment Structure/Cash Flow: Is the award paid up front or is it heavily reimbursable? Will we be able to recoup indirect costs?		3=Up front payments & indirect costs. 2=Up front or scheduled payments. 1=100% Reimbursable (high internal capacity risk).
8. Match Requirement: Is there a cash or significant in-kind match requirement?		3=None. 1=Requires more than 1% of budget or significant new cash fundraising effort.
Total Score (Part 2):		

Part 3: Strategic Decision Making

(NEW VS. EXISTING FUNDERS)

Total Assessment Score	Strategic Recommendation for NEW Prospect	Strategic Recommendation for EXISTING Funder
17 - 24 Points (High Fit)	**APPLY NOW:** Commit maximum time. This is a high-probability, low-risk opportunity.	**MAINTAIN & GROW:** This is a foundation partner. Invest more time in high-level stewardship.
11 - 16 Points (Moderate Fit)	**APPLY WITH CAUTION:** Proceed only if the Capacity Fit (Part 2) is acceptable and your team has excess bandwidth.	**EVALUATE:** This relationship is not optimal. Look for ways to re-negotiate reporting or scale back dependency.
8 - 10 Points (Low Fit)	**AVOID:** This is a high-risk time and financial investment. Use the score to justify spending zero writing time. Focus on better-aligned prospects.	**PLAN TRANSITION:** This relationship is high-cost/low-reward. Begin planning to scale back effort and find a replacement for this funding source.

The Strategic Next Step

An assessment identifies where to start; a system ensures you finish. The **Excelevate Strategic Funding Tracker** takes these alignment scores and transforms them into a live, data-driven pipeline.

By integrating your checklist results, the Tracker automatically monitors your portfolio's risk, calculates your true success rates based on alignment, and generates the board-ready metrics you need to drive long-term strategy—not just chase the next deadline. Stop wondering if your time is being spent wisely and start measuring your mission's momentum.

Ready to turn your assessments into a sustainable engine for growth? Explore the full Tracker system and the automated strategy dashboards at **www.excelevate.org**.