



Behavioral Health Fundraising in Flux: Centering Community & Securing Support

This session explores how to navigate funding uncertainty by strengthening philanthropic partnerships, aligning fundraising with community priorities, and creating flexible, community-centered fundraising programs. Participants will learn practical strategies to build relationships, engage donors, diversify revenue, and activate board and staff leadership.

The following handouts are provided to help you put the session's strategies into practice:

- 1. Action Checklist**

A quick-start guide to begin implementing practices covered in the session right away.

- 2. Calls with Foundation Program Officers**

Best practices for preparing, conducting, and following up on conversations with program officers.

- 3. Prospecting Tool**

A practical worksheet to identify and prioritize prospective donors and funders.

- 4. Sample Board Fundraising Menu**

An example menu of options to help board members engage in fundraising according to their strengths and capacity.

If you'd like additional tools, training, or support, contact:

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Action Checklist: Supporting Individual Donor Fundraising

This quarter, commit to at least one action in each area.

1. Build Relationships

- ☐ Introduce staff to someone in your network who might care about our mission.
- ☐ Invite a friend or colleague to attend an event or tour.
- ☐ Share one of our social media posts and add your own personal story.

2. Share Our Story

- ☐ Learn our “elevator pitch” (short, clear message about our mission).
- ☐ Practice using asset-framed language when talking about behavioral health.
- ☐ Be ready with one personal story: *Why do you care about this work?*

3. Engage Donors

- ☐ Write 2–3 thank-you notes to donors (staff will provide names).
- ☐ Make a donor thank-you call.
- ☐ Attend at least one donor-related event and introduce yourself to guests.

4. Support Fundraising Strategy

- ☐ Review our fundraising priorities to ensure they align with community needs.
- ☐ Provide feedback on how you see lived experience represented in our messaging.
- ☐ Advocate for a balanced approach: foundations and individual donors.

5. Personal Commitment

- ☐ Consider your own giving: set a meaningful annual gift to model commitment.
- ☐ Encourage others in your network to give, even at small amounts.
- ☐ Share one concrete fundraising action you’ll take in the next 30 days.

Meeting with Foundation Program Officers

Prospective Funders



Preparation: Prior to the call, determine:

- What are your goals for the call?
- What information do you need from them?
- Review their website and grant opportunities to determine a potential fit.
- Ensure you're clear on upcoming deadlines and process. If not, bring these questions to the meeting.
- If you don't have any specific procedural questions, have a couple prepared to be able to keep the conversation moving. You could ask them how their funding priorities have changed over time, what their overall goals are with funding, or what makes for a strong partnership with grantees.
- If you already know that you're not a good funding fit, state that in the preliminary communications, along with the purpose of connecting. For example, that you know that they're a player in your funding area and would like to see if they have ideas of other funders you should connect with.

During the Call or Meeting

- Start the call by laying out your goals for the time together. For example, "I wanted to connect to see if our programming is a good fit for your [insert specific] funding stream."
- Allow them to set the stage by asking them about their role with the funder or their background.
- Transition into updates on the program or introduction, if they're new to it. Try to be succinct, until they give an indication of wanting or needing more information.
 - Focus on the impact and tying it into the funder's stated funding foci.
- Be prepared with a story of impact. For example, a member who was able to scale or deepen their impact through support of FRA.
- Make sure you leave space for them to ask questions or clarify.
- After you're able to cover why you think you're a good fit for the funder, ask them if they think it's a good match.
- If they say no, make sure you know and understand why. Then ask if they know of other funders who may be a better fit. If there's an opportunity for a future funding relationship (ie: the budget size is too small or longevity of operations), ask how you can best keep them informed.
- If they say yes, proceed to ask any questions you have about their funding process. Make sure none of these questions can be easily answered by their website or RFP. Questions could include:
 - Average grant size
 - Timeline for grant decisions
 - Grant review process (like who will be reading grant)

Following the Meeting

- Send a brief follow-up email, thanking them for their time and including any requests that came out of the meeting.

One More Time Through Your Rolodex

Adapted from Joan Garry's "Build Your Army"



1) Who are your work friends or colleagues?

1.		3.	
Strategy:			Strategy:
2.		4.	
Strategy:			Strategy:

2) Who have you spoken to about the organization/project, and who has shown genuine enthusiasm?

1.		3.	
Strategy:			Strategy:
2.		4.	
Strategy:			Strategy:

3) Who do you spend special social time with? (Bowling league, running group, restaurant club, ski trips, etc.)

1.		3.	
Strategy:			Strategy:
2.		4.	
Strategy:			Strategy:

4) Who has joined you the last 4 - 5 times you've gone out to dinner?

1.		3.	
Strategy:			Strategy:
2.		4.	
Strategy:			Strategy:

5) Who was at your table for the last few major holidays? (Passover, Easter, Christmas, New Year's, Thanksgiving, Yom Kippur, etc.)

1.		3.	
Strategy:			Strategy:
2.		4.	
Strategy:			Strategy:

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6) To whom do you send holiday cards or announcements?

1.		3.	
Strategy:			Strategy:
2.		4.	
Strategy:			Strategy:

7) What family members have you not involved with the organization yet?
Folks out of town?

1.		3.	
Strategy:			Strategy:
2.		4.	
Strategy:			Strategy:

8) What about any professionals whom you frequent? (Your lawyer, dentist, doctor, pharmacist, broker, dry cleaner, hairdresser, masseuse, children's teacher, vet, computer repair person, your favorite restaurant manager, accountant, landscaper, fix-it person)

1.		3.	
Strategy:			Strategy:
2.		4.	
Strategy:			Strategy:

9) Any other orbits? (House of worship, old neighborhood, mentor/mentee)

1.		3.	
Strategy:			Strategy:
2.		4.	
Strategy:			Strategy:

10) Last call for anybody else!

1.		3.	
Strategy:			Strategy:
2.		4.	
Strategy:			Strategy:

Unicorns R Real Foundation

Board Fundraising Commitment



The Board of Directors of the Unicorns R Real Foundation, in an effort to ensure that the organization has sufficient funding for operations and that skills are leveraged to the best of the board's ability, has created the following Board Commitment Form.

Required

In order to continue as a Board Member in good standing, each Board Member is **required** to do the following (initial to indicate agreement):

- ___ Make a personally meaningful financial contribution each calendar year. In-kind gifts or services, ticket purchases, or silent auction items may not be used in lieu of this commitment.
- ___ Participate in donor thank-a-thon

Important

Recognizing that additional engagement in fundraising activities is important to successfully raise funds, each Board Member is asked to do the following (initial to indicate agreement):

- ___ Participate in donor calls for year-end appeal/Annual giving day
- ___ Attend Donor Meeting with staff
- ___ Maintain communication with 3 donors assigned in your donor portfolio throughout the year (includes 4 specific reach outs, directed by staff).

Optional

Utilizing Board Members' individual skills, experiences, and connections is an important part of effective fundraising. To that end, Board Members are asked to select A **MINIMUM OF TWO** tasks from this **optional** list and commit to complete them this year (initial to indicate agreement):

- ___ Host a house party
- ___ Secure a sponsorship from employer or local business (_____)
- ___ Write notes to donors for annual appeal
- ___ Attend tour of facility with donors
- ___ Participate on the planning committee of event
- ___ Participate in presentation to service organizations
- ___ Solicit new donors. (Select one or more campaigns)
 - ___ Summer Scholarships
 - ___ General Donor
 - ___ Gala attendee

Name

Signature

Date

This is a sample. Your board should create a list of meaningful tasks for your organization.