The Mini Discovery Campaign

“Friendraising” Action Plan

This asset exercise will help you identify your base of support (friends) and give you tools to grow this support toward meeting your fundraising goals.
Welcome to the Friendraising action plan, a resource to help you begin taking initial steps toward a fundraising campaign

This asset exercise will:

- Give you a space to collect important project information in preparation for fundraising
  - Help you identify a prospect pool of potential donors
    - Build affinity
  - Prepare you for the early steps of a fundraising campaign

To complete this exercise, you will need:

- A project or cause that you believe in, with a clear mission and vision
  - A list of current project assets
- List of talking points and/or a written description of your project
- A short-term discovery goal (e.g., to learn specific community needs, identify how to improve, build a new advisory board, ideas for new initiatives, acquire matching funds)
  - Curiosity and a sense of urgency
1. **Identify your team** (more fun with a buddy or two)

   Who could be an active participant in the Mini Discovery Campaign?
   Record the names you think of in the table below:

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<tr>
<th>Name 1</th>
<th>Name 2</th>
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2. **Do an asset inventory**

   (To generate names and a clear sense of what you already have/have to offer).

   Sample assets: partnerships with professional organizations, Office space, individual donors and advocates, newsletter.

   Begin your list in the table below:

<table>
<thead>
<tr>
<th>Asset 1</th>
<th>Asset 2</th>
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3. Set a tangible goal

(Learn more about what the community needs, etc.).

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4. Establish record keeping method
   (database, spreadsheet, reminders)

This will help you to know what needs to be completed, and keep track of what tasks have already been done. Track your progress and create a system for follow-ups. Use any tool set that works well for you. For example:

<table>
<thead>
<tr>
<th>What Task</th>
<th>Whose Responsibility</th>
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5. **Create a description of your organization or project**

Try and keep the language clear and simple. Think about connecting with the reader emotionally, and craft the description with their concerns in mind:

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6. **Identify first interviewees**

Begin interviewing stakeholders to get a sense for their passions and motivations for potentially supporting the project. Start close in and practice interviewing those you know well. You can say, “Can I practice on you?”

**Sample Interview Questions:**

- We’re talking to a number of people in the community about X cause or organization. We’d like to Y (mini campaign goal). Do you have a few minutes to share your thoughts? They would be very helpful.
- What organizations or causes have you been involved with? In what ways?
- What is your history with our cause/organization—how have you been involved to date?
- What would you say is the view in the community of our cause/organization?
- What do we do best in our community?
- What values do you try to express through your volunteerism? Your charitable donations?
- We’ve written a draft description of what we’d like to share with the community about our new project. Would you be willing to give your feedback?
- Who else should we be talking to?
- We’d like to circle back to you to follow up after we speak to a few more folks. Is that okay?

Write down your own ideas for questions below.

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________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
7. **Make appointments**  
   If it helps, set a goal for the number of appointments you and your team want to make. Don’t ask for more than 30 minutes or a quick lunch/phone call/coffee, depending on the relationship.

8. **Take notes if possible**  
   Or record notes shortly after. Be sure to identify any follow ups promised to prospect, contact, or interviewee.

9. **Provide a next step for each interviewee**  
   Even if it’s “maybe we can talk again when we’re further along.”

10. **Categorize interviewee**  
    Do this for appropriate follow up strategies. **Ask:** Who else should we talk to? Get follow ups into your implementation system and be sure assigned person is aware and ready.

    **Sample follow up categories:** volunteer, donor prospect, board prospect, willing to assist in further introduction.

11. **Say thank you**  
    Say thank you in appropriate ways and follow up as promised.

12. **Record results**  
    Add information about person interviewed and other prospects discussed.