THRIVE: Building A Fundraising System Worksheet

Assess your system. Align your team. Act on one meaningful change.

Organization: _____ Name: _____

1) ASSESS | What is working—and where is the friction?

Mark one response for each component based on how your organization actually operates.

THRIVE COMPONENT / TEST	YOUR ASSESSMENT
T | TARGETS **Clear fundraising goals tied to organizational priorities.**	☐ Strong ☐ Needs attention ☐ Not sure
H | HUDDLE **Regular collaboration across teams and functions.**	☐ Strong ☐ Needs attention ☐ Not sure
R | ROLES **Defined responsibilities and decision-making authority.**	☐ Strong ☐ Needs attention ☐ Not sure
I | INFORMATION **Timely access to accurate, relevant information.**	☐ Strong ☐ Needs attention ☐ Not sure
V | VISIBILITY **Shared awareness of progress, priorities, and commitments.**	☐ Strong ☐ Needs attention ☐ Not sure
E | EVALUATION **Consistent review, learning, and improvement.**	☐ Strong ☐ Needs attention ☐ Not sure

2) ALIGN | Connect the challenge to the whole organization

Which ONE THRIVE area creates the most friction?

Where does this show up, and who else is affected (leadership, finance, programs, board)?

What would improve if this challenge were addressed?

3) ACT | Your 90-day commitment

One specific, manageable change we will make:

FIRST 30 DAYS	**Start / clarify / convene:** _____
BY 60 DAYS	Implement / test / communicate: _____
BY 90 DAYS	Evaluate / refine / sustain: _____

Accountable owner + key partners:

Evidence of progress: How will we know it is working?

MY COMMITMENT: I will take the first step by _____.