



Talking Points: About Your Organization

Cause & Event's customized services begin with a thorough understanding of an organization. Please respond to the following questions to help inform discussion on how Cause & Event can best meet your organization's needs.

Organization _____

Prepared by: Name _____ Title _____

Contact information _____

- 1 When was the organization founded and by whom? Has that affiliation changed?
- 2 What is the organization's mission? Whom does it serve?
- 3 What are the critical needs or services your organization provides? What are the current numbers being served?
- 4 How large is the Board of Directors? Are all members active in fundraising?
- 5 What professions/skills/expertise do board members represent?
- 6 How many staff members? What are their areas of responsibility, and how many are involved in development?
- 7 How is your organization funded (by sector, government, foundations, private)?
- 8 How is the money used? What are the largest expenses?
- 9 What is the organization's history of success with fundraising?
- 10 What current campaigns are planned or underway?

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Talking Points: Goals and Challenges

To develop strategic solutions, Cause & Event begins with a clear understanding of an organization's goals and challenges. Please respond to the following questions to help inform discussion and strategic thinking to meet your organization's needs.

Organization _____

Prepared by: Name _____ Title _____

Contact information _____

- 1 What are your organization's most critical challenges?
- 2 Are these recent or long-standing challenges? How did they evolve/escalate?
- 3 What solutions have been tried?
- 4 What are your organization's current development objectives?
- 5 What is the timetable for achieving those objectives? Is it driven by a specific need or deadline?
- 6 What are your organization's long-term development goals?
- 7 What are your organization's greatest strengths to leverage?
- 8 What types of development services does your organization need?

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