

The Fundraising Readiness Reset

A workbook to help you
reclaim your time, energy, and impact

2026

If you're holding this workbook, there's a good chance you've spent the last year doing a lot of fundraising — and very little time actually thinking about your fundraising.

Most fundraisers don't lack commitment, creativity, or care. They lack space. Space to pause, notice patterns, and make decisions that aren't rooted in urgency, pressure, or guilt.

This workbook is an invitation to slow down long enough to make sense of what actually happened — not just what you hoped would happen or what you think should have happened.

Together, we'll look at your fundraising through two lenses that rarely get discussed honestly:

- the energy it required
- and the results it produced

Not just dollars raised, but relationships deepened, confidence built, and capacity created. You'll probably notice things you didn't expect.

By the end, you won't have a long to-do list.

You'll have three decisions:

- one thing to keep
- one thing to release
- and one thing to reimagine

That's enough.

My hope is that you move through this with honesty, gentleness, and curiosity - not judgment. Fundraising is complex, emotional work. The fact that you're here, reflecting instead of reacting, already tells me a lot about the kind of leader you are.

You don't need to do more.

You need to do what matters, with clarity and intention.

I'm really glad you're here.



Mallory Erickson
Founder & CEO

Part 1

Understanding Energy

How you spend your time and clarifying
how your energy is spent

The Four Types of Fundraising Energy



Time Energy

Actual hours and scheduling logistics. This is the actual time work takes.



Emotional Energy

Actual hours and scheduling logistics. This is the actual time work takes.



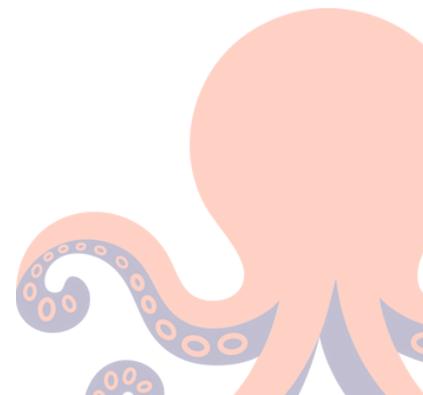
Decision-Making Energy

How many judgement calls, pivots, or choices this requires. Is it autopilot or constant navigation?



Coordination Energy

How many people, systems, or moving parts you have to manage. Are you herding cats or working solo.



Part 2

Your 2025 Activities

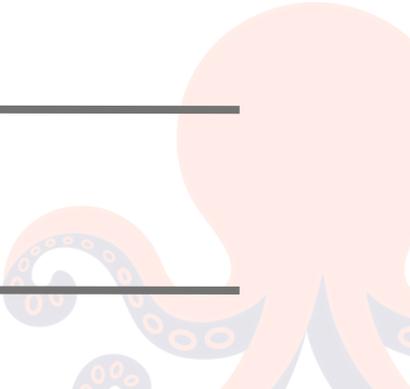
Where your energy went in the last year

2025 Fundraising Activities

Step 1: List Your Major Fundraising Activities

List 5-8 fundraising activities that fall within your sphere of influence. Remember: These should be things you're responsible for or have a meaningful choice about.

- 1 _____
- 2 _____
- 3 _____
- 4 _____
- 5 _____
- 6 _____
- 7 _____
- 8 _____



Part 3

Energy Scoring

Score each fundraising activity
across all four energy types

Score Each Activity Across All Four Energy Types

For each activity you listed, give it a score from 0-10 for each type of energy, then add them up. Quick gut scores, don't agonize.

Activity #1: _____

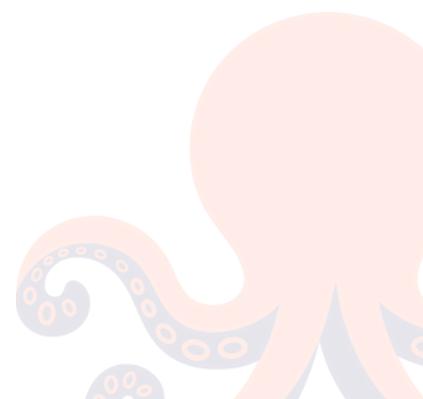
My level of control over this: (circle one)

Full control | Shared control | I influence how it's done

Energy Type	Score (0-10)	Notes
Time Energy	7	
Taxing Emotional Energy	2	
Decision-Making Energy	9	
Coordination Energy	4	
TOTAL ENERGY SCORE	22	

Results Produced (0-10): _____

Consider: dollars raised, relationships deepened, systems built, mission impact, your own growth



Activity #2: _____

My level of control over this: (circle one)

Full control | Shared control | I influence how it's done

Energy Type	Score (0-10)	Notes
Time Energy		
Emotional Energy		
Decision-Making Energy		
Coordination Energy		
TOTAL ENERGY SCORE		

Results Produced (0-10): _____

Consider: dollars raised, relationships deepened, systems built, mission impact, your own growth

Activity #3: _____

My level of control over this: (circle one)

Full control | Shared control | I influence how it's done

Energy Type	Score (0-10)	Notes
Time Energy		
Emotional Energy		
Decision-Making Energy		
Coordination Energy		
TOTAL ENERGY SCORE		

Results Produced (0-10): _____

Consider: dollars raised, relationships deepened, systems built, mission impact, your own growth



Activity #4: _____

My level of control over this: (circle one)

Full control | Shared control | I influence how it's done

Energy Type	Score (0-10)	Notes
Time Energy		
Emotional Energy		
Decision-Making Energy		
Coordination Energy		
TOTAL ENERGY SCORE		

Results Produced (0-10): _____

Consider: dollars raised, relationships deepened, systems built, mission impact, your own growth

Activity #5: _____

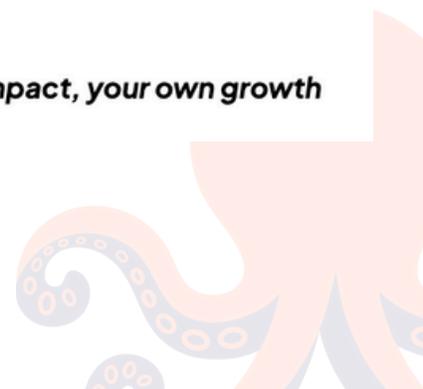
My level of control over this: (circle one)

Full control | Shared control | I influence how it's done

Energy Type	Score (0-10)	Notes
Time Energy		
Emotional Energy		
Decision-Making Energy		
Coordination Energy		
TOTAL ENERGY SCORE		

Results Produced (0-10): _____

Consider: dollars raised, relationships deepened, systems built, mission impact, your own growth



Activity #6: _____

My level of control over this: (circle one)

Full control | Shared control | I influence how it's done

Energy Type	Score (0-10)	Notes
Time Energy		
Emotional Energy		
Decision-Making Energy		
Coordination Energy		
TOTAL ENERGY SCORE		

Results Produced (0-10): _____

Consider: dollars raised, relationships deepened, systems built, mission impact, your own growth

Activity #7: _____

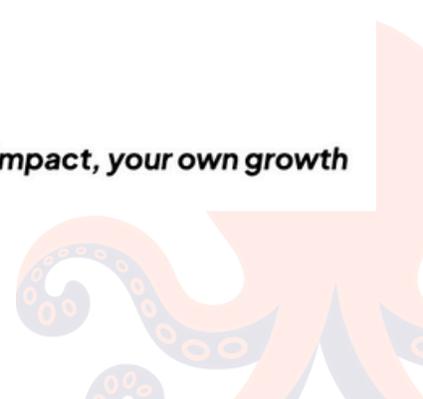
My level of control over this: (circle one)

Full control | Shared control | I influence how it's done

Energy Type	Score (0-10)	Notes
Time Energy		
Emotional Energy		
Decision-Making Energy		
Coordination Energy		
TOTAL ENERGY SCORE		

Results Produced (0-10): _____

Consider: dollars raised, relationships deepened, systems built, mission impact, your own growth



Activity #8: _____

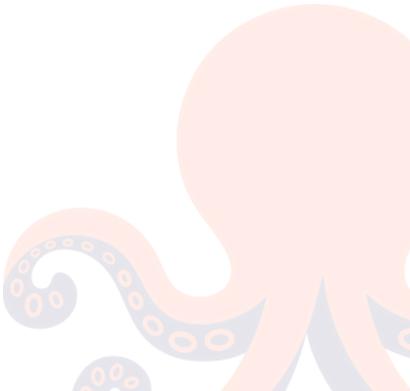
My level of control over this: (circle one)

Full control | Shared control | I influence how it's done

Energy Type	Score (0-10)	Notes
Time Energy		
Emotional Energy		
Decision-Making Energy		
Coordination Energy		
TOTAL ENERGY SCORE		

Results Produced (0-10): _____

Consider: dollars raised, relationships deepened, systems built, mission impact, your own growth



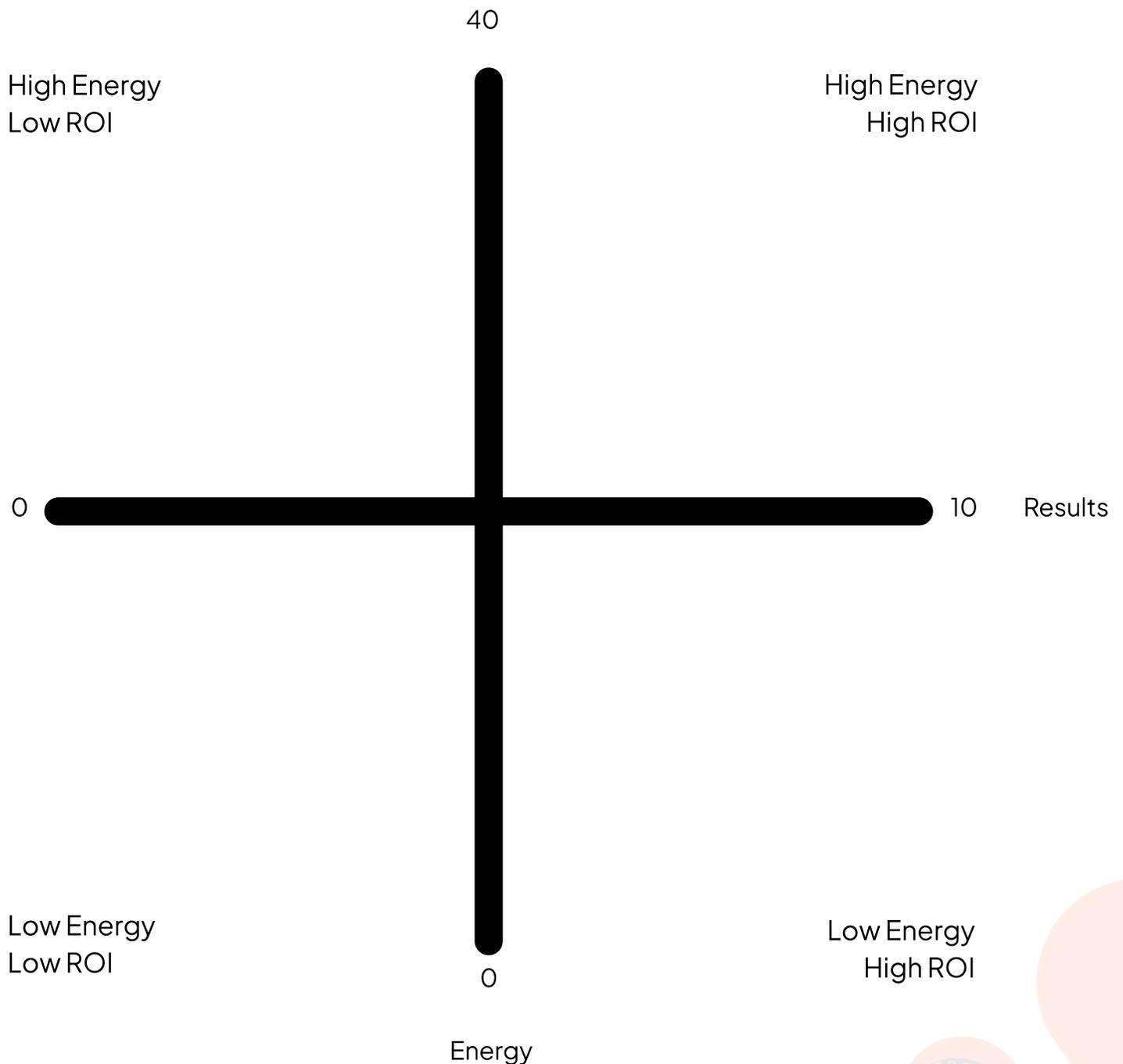
Part 4

The Map

Visualize the outcomes of your scoring

Score Each Activity Across All Four Energy Types

Use the space below to plot each activity using: Vertical Axis = Total Energy Required (0-40), Horizontal Axis = Results Produced (0-10)



Part 5

The Patterns

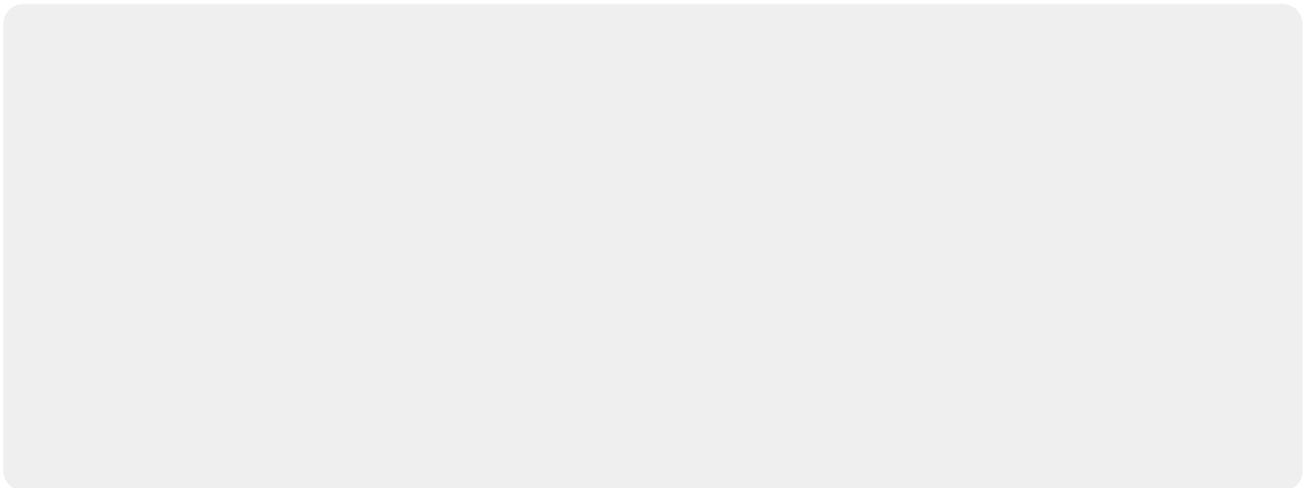
What do you notice in mapping your scoring?

What Do You Notice?

Look at your map. Just look at it for a moment. Write quickly. Bullet points. Whatever comes up.

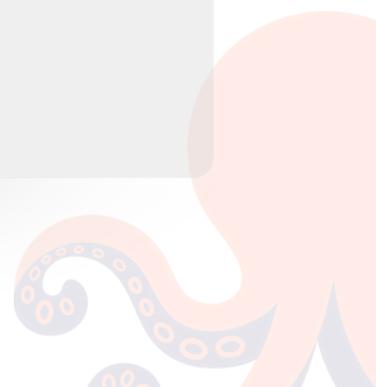
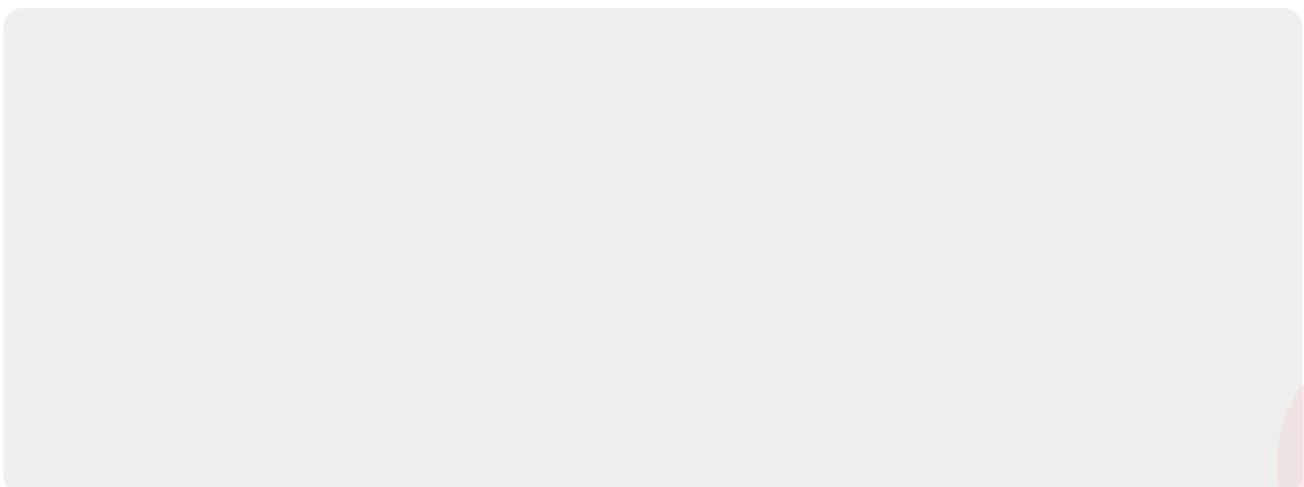
What's in your High Energy, Low Results that you keep doing anyway?

What's the story you're telling yourself about why it has to stay?



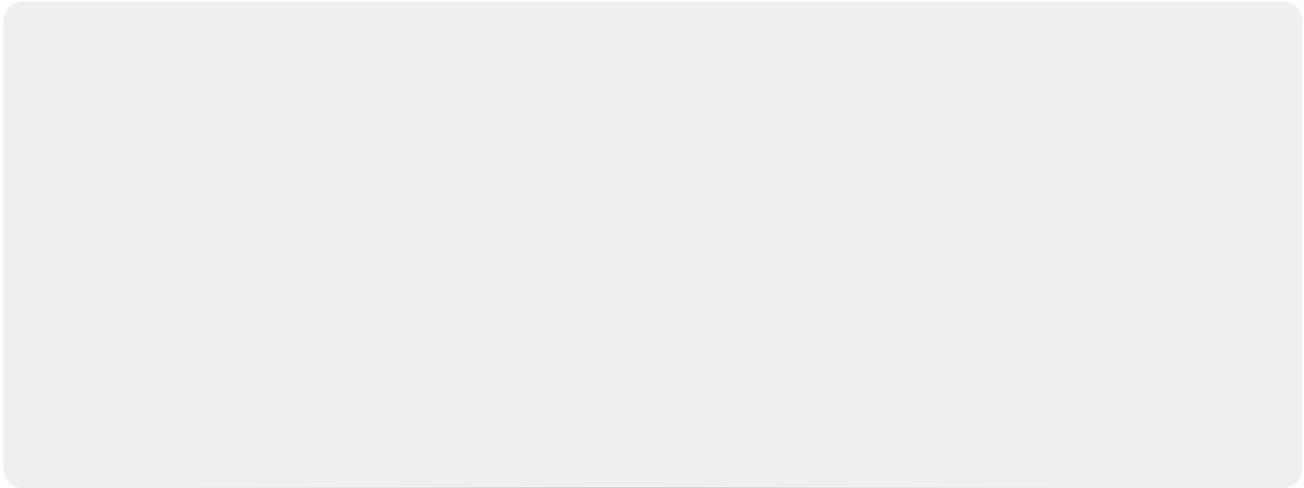
What's in your Low Energy, High Results that you're not protecting?

What would happen if you built your whole year around those things instead?



What pattern do you see about how you spent your energy in 2025?

Were you chasing, reacting, trying to prove something, avoiding something, building something?



Part 6

Keep, Release, or Reimagine

From your learnings, these are the three decisions
you can make moving forward

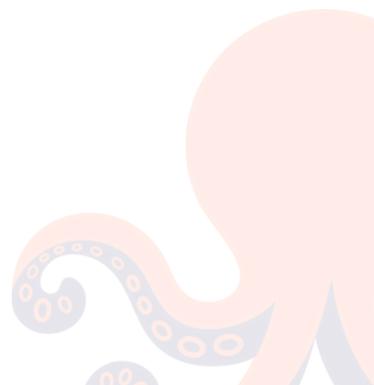
Keep

One thing that's working and worth protecting. This goes in your calendar first. This gets resourced. This gets defended when everything else tries to crowd it out.

I'm keeping:

Why it matters:

How I'll protect it moving forward:



Release

One thing that's run its course and you can finally set down.

I'm releasing:

What I'm letting go of:

What I'm gaining by releasing it:



Reimagine

One thing that has potential but needs to work differently for you.

I'm reimagining:

What I'm letting go of:

What it could look like instead:



Your Commitments

Put these somewhere you'll see them. Don't let these decisions disappear into your downloads folder.

Where will you keep these visible?

- Sticky note by my desk
- In my phone (screenshot/note)
- First page of my planner
- Calendar reminder
- Other:



What Is Your #1 Lightbulb From Conducting This Exercise



Bonus

Choose Your Own Adventure

Based on your outcomes, here are sample paths to help
you reflect, release, and reimagine

You've got this.

“Wherever you are right now — energized, overwhelmed, or somewhere in between — **you're not behind**. This is designed to meet you where you are. Pick the path that feels most true, and let's take the next right step.”



Choose Your Next Step

Path A: Everything is High ROI + High Energy

Reality check: high impact, but at the expense of all of if not more of your energy. Be careful of sustainability and prioritization. You can do anything - but you shouldn't do everything.

Action Item:

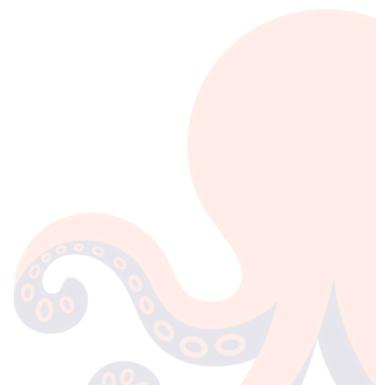
- Redo this exercise for a macro activity.
- Pick one of your activities and dive a few layers down
- Choose 8-12 sub-activities that require energy to evaluate at a deeper level

Path B: High Energy + Low Results

Reality check: your spending a lot of energy and not getting the results you need. There may be misallocated effort, outdated strategies, or activities that are draining without return.

Action Item:

- Stop doing, and pause
- Decide what you need to remove or redesign
- The goal is increase impact and reduce energy



Path C: The Building Year

Reality check: does your mapping feel unfair because you spent time building systems and structures that haven't driven outcomes yet? That's okay. Let's take a look at lagging indicators to help you create a forward looking map.

Action Item:

- Map out the expected ROI moving forward
- Re-do this exercise based on the "Expected Energy Spend"
- Revisit this as validation over time and revisit what's on and what's off in real time.

Path D: My Energy Isn't The Problem – It's Emotional or Decision Fatigue

Reality check: are you feeling chronic activation, dread, avoidance, overthinking, or second-guessing? Go back and look over the types of energy and consider where you need to reduce or replace over-indexing on energy types. The goal is to help you refuel.

Action Item: pick one mitigation strategy

- Decide what you need to remove or redesign
 - Emotional → practice, scripting, support, boundaries
 - Decision fatigue → templates, decision rules, fewer approvals, default plans
 - Coordination → project management simplification, roles, timelines



Path E: I'm A Frontline Fundraiser and Don't Control the Strategy

Reality check: when all the results are too close, you may be able to drill into discrepancies running this exercise through one single energy lens at a time. It may reveal different results that illuminate areas of opportunity to increase your impact and balance your energy.

Action Item:

- Map what you own
- Create an “influence script” to align your manager on what takes the most energy, what produces the highest ROI, and what you can change or test.

Path F: All The Score Are Relatively Close

Reality check: are you feeling chronic activation, dread, avoidance, overthinking, or second-guessing? Go back and look over the types of energy and consider where you need to reduce or replace over-indexing on energy types. The goal is to help you refuel.

Action Item:

- Re-run the map using **Time** only
- Re-run the map using **Emotional** only
- Re-run the map using **Decision** only
- What's changed? What activities become obvious drains once you isolate them by energy type?

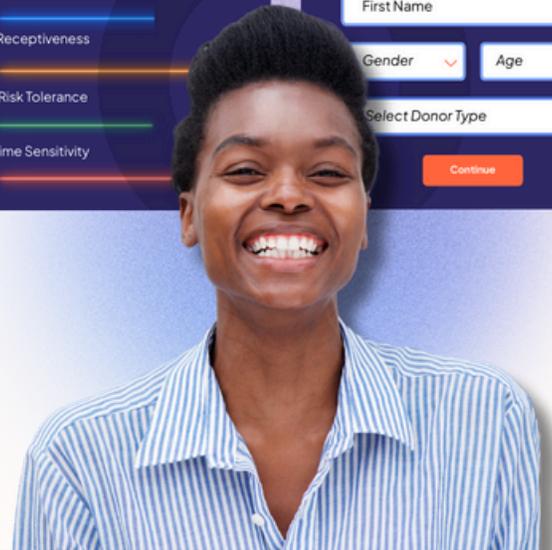
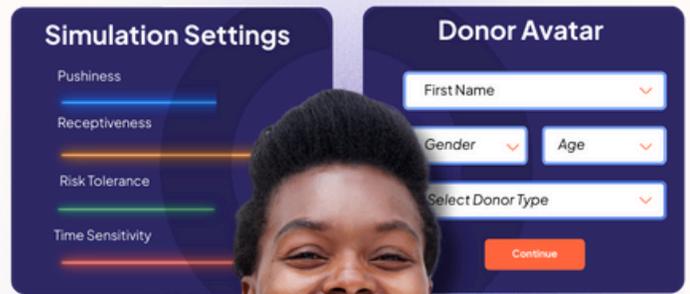


**We can help you decrease
energy and increase ROI**



The Fundraising Readiness Platform

Ensure every member of your team is ready for high stakes donor conversations.



You've Identified What's Working And What Needs To Change



33%

Increase in ask effectiveness



11%

Increase in adaptability and decision-making under pressure



280%

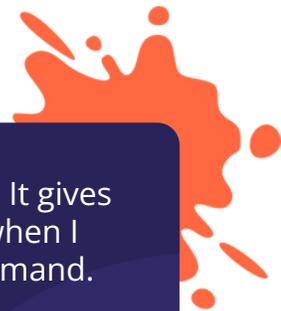
Increase in donor outreach and engagement



"Practivated has been a total game changer. It gives my team access to real-time coaching even when I can't be there. It's like having a mentor on demand."



Lori Cook
AVP of Development





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