



Tree Equity Handbook

A Practical Guide to Closing the Canopy Gap Between Neighborhoods

ACTIVITY 6.3

→ Funder Inventory and Engagement Strategy

Toolkit 6: Fund Your Program

Issued November 2025



Activity Map

→ [Tree Equity Funding Needs Assessment](#)

→ [Funding Mechanisms and Priorities](#)

Funder Inventory and Engagement Strategy

Activity 6.3: Funder Inventory and Engagement Strategy

Toolkit 6

Fund Your Program

You know what your Tree Equity goals are, who will be involved, and how your coalition aims to pursue those goals. Now it's time to place one of the most important pieces of the puzzle: Where your funding will come from.

Building or expanding an urban forestry program to include Tree Equity objectives usually comes with added expenses — from specialized staff who engage with community partners to additional tree stock and planting resources. These new expenses, however, can create opportunities for new funding mechanisms. Use this toolkit to assess your Tree Equity funding needs, identify potential new sources of support, and develop effective strategies to make your case to funders.

Funder Inventory and Engagement Strategy



Overview & Basic Steps

In the Tree Equity space, philanthropic funders often have missions that never mention trees or nature. But urban forests provide living infrastructure that can support many civic needs and goals: improving public health or educational outcomes, improving walkability and transit usage, reducing air and water pollution, and more. This activity helps you match your coalition's funding needs (identified in [Activity 1.1](#)) to strategic opportunities from a wide range of potential funding sources that your stakeholder committee can pursue.

As you work through this exercise, consider all possible intersections between your mission and your potential funders' interests. This will not only broaden your opportunities but will also inform effective engagement strategies that help you make a strong case for Tree Equity.

Suggested Time: 4–6 weeks

Level of Difficulty: Difficult

Participants: Tree Equity Coalition members

Before starting this activity, you might need:

- Funding Needs Worksheet → [Activity 6.1](#)

Instructions

- 1 Complete the **Funding Inventory Worksheet** ([page 5](#)) to identify potential funders and begin to develop outreach strategies.

TOOLKIT 6: Fund Your Program | Activity 3 – WORKSHEET

Funding Opportunities Assessment Worksheet



For the following exercise, fill in each column as follows:

- 1. Funding Source:** List one realistic philanthropic funding source that you want to pursue or protect to accomplish your programmatic goals.
- 2. Funder Interest:** Describe what types of projects or programs that each particular funder prioritizes, whether in general or for a specific upcoming funding opportunity.
- 3. Contact:** Add as much contact information as you have for specific individuals.
- 4. Strategic Opportunities:** What role does the contact have at their organization? What funding opportunities are they responsible for overseeing?
- 5. Outreach Level:** Assess the level of relationship you or others in your program have with the contact. Use the following key (modified from resources by the Afterschool Alliance):

- 0 = Do not know this person, have not contacted
- 1 = Know who this person is, but have not contacted
- 2 = Have contacted this person, but have not made any specific ask
- 3 = Currently working with this person to support the program

Add any relevant notes here about the contact’s role/relationships in the community.

- 6. Coalition Point Person/Next Steps:** Assign the most appropriate person from your coalition to take the lead on developing or maintaining that relationship, as well as initial next steps for the help that individual get started.

Sample Worksheet

Funding Source #1	Carmichael Family Fund
Funder Interest	Social entrepreneurship, public health, climate
Contact Name	Patricia Seawell, Environment Program Director
Strategic Opportunities	Upcoming philanthropic roundtable meeting; Proposal cycle deadline March 4th
Outreach Level	3 <input type="checkbox"/> 2 <input checked="" type="checkbox"/> Stanley H. served on a board with Patricia 2021–2023 1 <input type="checkbox"/> 0 <input type="checkbox"/>
Point Person/Next Steps	Stanley Huang 1. Talk with Patricia at next philanthropic roundtable meeting

Funder Inventory Worksheet

Feel free to replicate the templates below for as many funding opportunities as you wish.



Funding Source #1	
Funder Interest	
Contact Name	
Strategic Opportunities	
Outreach Level	<p>3</p> <p>2</p> <p>1</p> <p>0</p>
Point Person/Next Steps	



Funding Source #2	
Funder Interest	
Contact Name	
Strategic Opportunities	
Outreach Level	<p>3 2 1 0</p>
Point Person/Next Steps	

Worksheets continue on next page



Funding Source #3	
Funder Interest	
Contact Name	
Strategic Opportunities	
Outreach Level	<p style="text-align: center;"> 3 2 1 0 </p>
Point Person/Next Steps	

Worksheets continue on next page



Funding Source #4	
Funder Interest	
Contact Name	
Strategic Opportunities	
Outreach Level	<p>3 2 1 0</p>
Point Person/Next Steps	

Activity 6.3: Funder Inventory and Engagement Strategy

Toolkit 6: Fund Your Program

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