



# Bring Your Fundraising Into Focus:

## Clarifying and Organizing Your Fundraising Strategies

Nonprofit Leaders Conference 2024

# Introductions



We support nonprofit organizations raising funds to fuel mission-driven work.

[www.cloudbreakcollective.com](http://www.cloudbreakcollective.com)



# When I Say Fundraising...

We just need money!

Can our board call some friends with money?

I don't know where to start!

Who knows how to write a grant application?

I guess we should host an event?

Maybe someone can call the Gates Foundation!

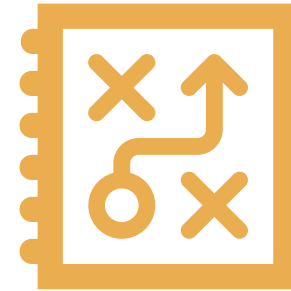




# Agenda Today



How to decide which fundraising strategies are right for you.



How to build a meaningful fundraising plan.



We cannot and should not do all the things.

In Person  
Events

Virtual  
Events

Grantwriting

Print Mail  
Appeals

**DECISION FATIGUE.**

Stocks

Peer to Peer  
Fundraising

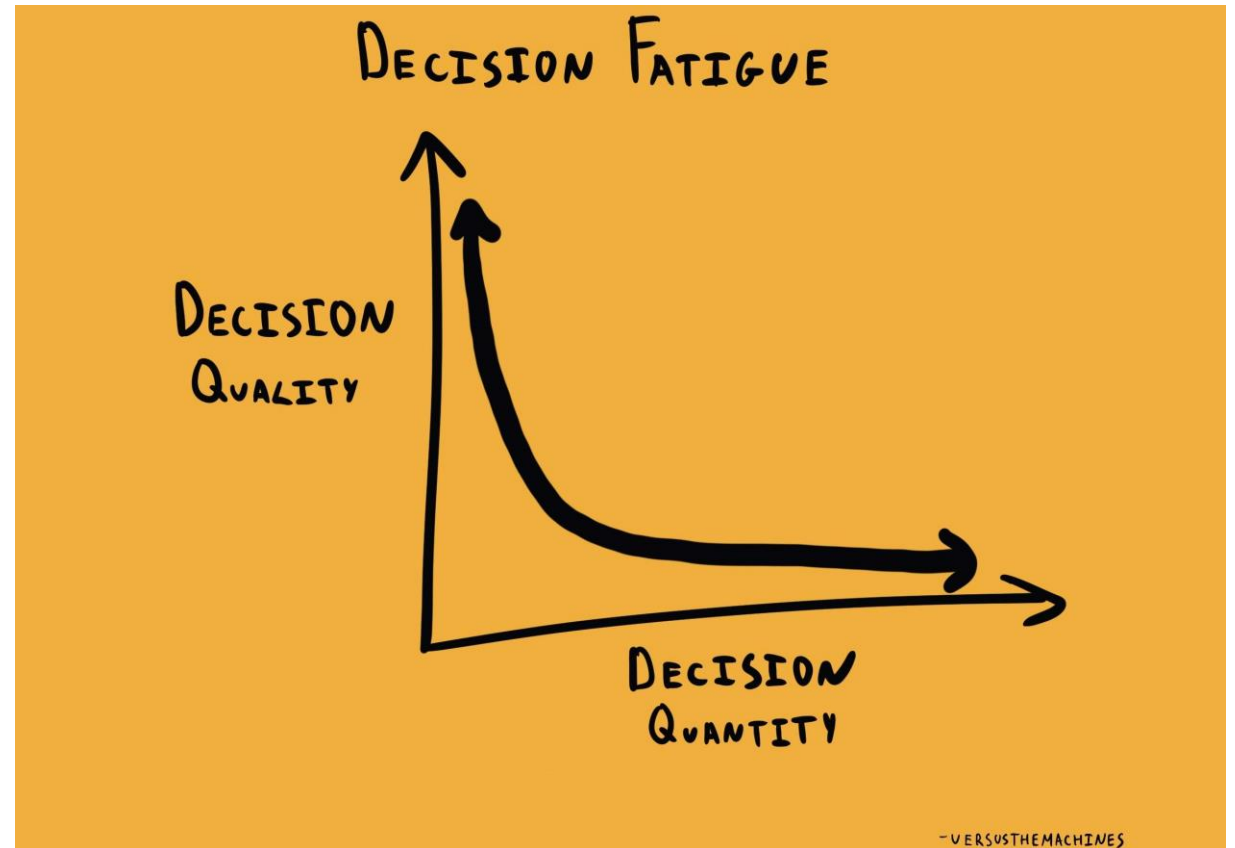
Campaigns

Workplace  
Giving



# Symptoms of “Decision Fatigue”

- ☀ Weakened judgment
- ☀ Impulsive decisions
- ☀ Procrastination



<https://thedeisionlab.com/biases/decision-fatigue>

# Fundraising Pin the Tail on the Donkey



# Fundraising Pin Ball







“The existence of **multiple alternatives** makes it easy for us to imagine alternatives that don’t exist—alternatives that combine the attractive features of the ones that do exist.

And to the extent that we engage our imaginations in this way, we will be even **less satisfied** with the alternative we end up choosing. So, once again, a greater variety of choices actually makes us feel worse.”

— **Barry Schwartz, [The Paradox of Choice: Why More Is Less](#)**



What 2-3 fundraising strategies did you use last year?



# Your **Purpose** is Not a **Strategy**.

- “Our strategy is to raise general operating funds.”
- “We are raising money to complete facility repairs.”
- “Our fundraising committee has decided to raise funds to grow our program.”

**These are  
PURPOSES**

•

# Strategy is a Means to the End of Purpose.



“We are focusing on writing grants to secure general operating dollars.”

All of that is in service of your mission.





So, now...

What 2-3 fundraising strategies  
did you use last year?



# Fundraising Jargon 101

Which fundraising  
words confuse  
You most?



# Narrow Down Your Options



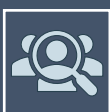
**How much time do you have?**



**What skills or knowledge do you have?**



**What systems are already in place to support fundraising?**



**Who is your audience? How old are they? Where do they live? What do they care about? How tech-savvy are they? Where do they access information?**





# Four Most Common Strategies



Events



Grants



Appeals



Major Gifts

# Events



Time

Skills & Knowledge

Systems

Typical ROI

## Consider:

- Does your audience like to attend events?
- Do you have enough time to do it well?
- Will you feel happy with this event even if you don't generate a large net?

# Grants



Time

Skills & Knowledge

Systems

Typical ROI

*\*usually, but not always!*

## Consider:

- Do you have the time required to compile grant applications?
- Do you understand what makes an effective grant application?
- Do you have the components necessary to write grants (language, budgets, attachments, etc.)?

# Appeals



Time

Skills & Knowledge

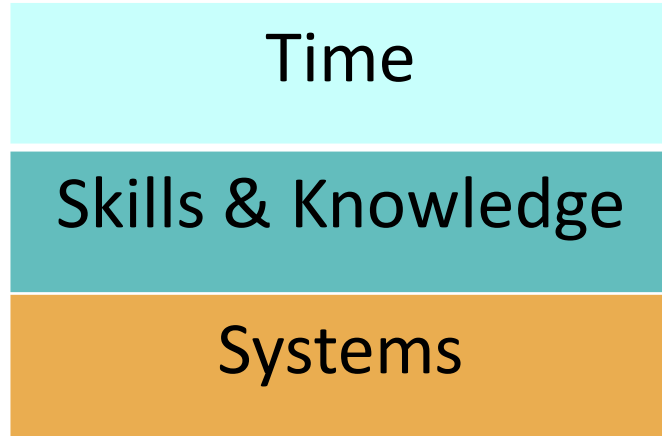
Systems

Typical ROI

## Consider:

- What method is your audience most likely to open? Email, mail, social, phone, etc.
- What story resonates most with your audience?
- Do you have the time to thank every gift that comes in?
- Have you stewarded your audience more than you've asked them?

# Major Gifts



Typical ROI

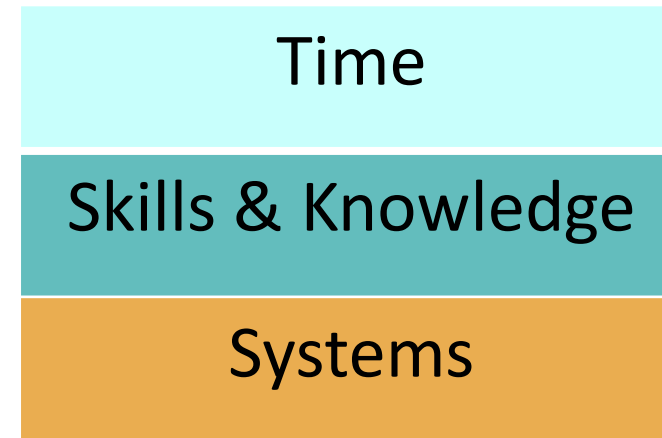
## Consider:

- Do you have the person-power needed to build relationships?
- Can you build a list of your biggest donors?
- Can you tell a clear story about your organization's impact?



# Other

- Workplace Giving
- Corporate Sponsorships
- Bequests
- Stocks
- In-Kind / Pro-Bono



Typical ROI

# Comparison of Key Fundraising Strategies



	EVENTS	GRANTS	APPEALS	MAJOR GIFTS	OTHER
Time	HIGH	HIGH	MED	HIGH	LOW
Skills & Knowledge	LOW	HIGH	MED	LOW	HIGH
Systems	MED	MED	MED	LOW	HIGH
Typical ROI	LOW	HIGH*	MED	HIGH	<i>Varies</i>



# Let's Talk it Out!



# Elements of a Good Fundraising Plan

---

**Strategies** – what will you do?

---

**Action Steps** – how will you do that?

---

**Targets** – how much will you raise?

---

**Costs** – what will it cost you to accomplish that?



# Strategies - Beginner

Strategy	Budget	Stretch Goal	Lead	Notes
Spring Event	\$20,000	\$30,000	Stacy	This is the gross revenue.
Major Donors	\$8,000	\$15,000	Sam	We have 15 donors who gave \$100 or higher last year. We have assigned 3 committee members each a portfolio of 5 people.
Grants	\$12,000	\$25,000	Sam	We have one \$5,000 grant committed already, and plan to submit applications to raise the remaining \$7,000.
<b>Totals</b>	<b>\$40,000</b>	<b>\$70,000</b>		

## Costs

- \$10,000 event costs
- \$750 printing, postage, and mileage reimbursements



# Strategies - Intermediate

Strategy	Budget	Stretch Goal	Lead	Notes
Major Donors	\$8,000	\$15,000	Sam	We have 15 donors who gave \$100 or higher last year. We have assigned 3 committee members each a portfolio of 5 people.

Tactic	Deadline	Lead
Review list of major donors (current and lapsed) and assign to portfolios	1/5/24	Sam
Make a menu of stewardship moves and share with development committee	1/31/24	Sam
Every major donor gets 2 moves	4/30/24	Portfolio Owners
Every major donors gets 5 moves	7/31/24	Portfolio Owners
Host training on how to make the ask	8/31/24	Gina
All major donors get personalized ask	10/31/24	Portfolio Owners
100% of major donors have given this year, and we have reengaged 50% of lapsed major donors.	11/30/24	Sam
Executive Director and Board makes personal thank you calls	12/31/24	Gina

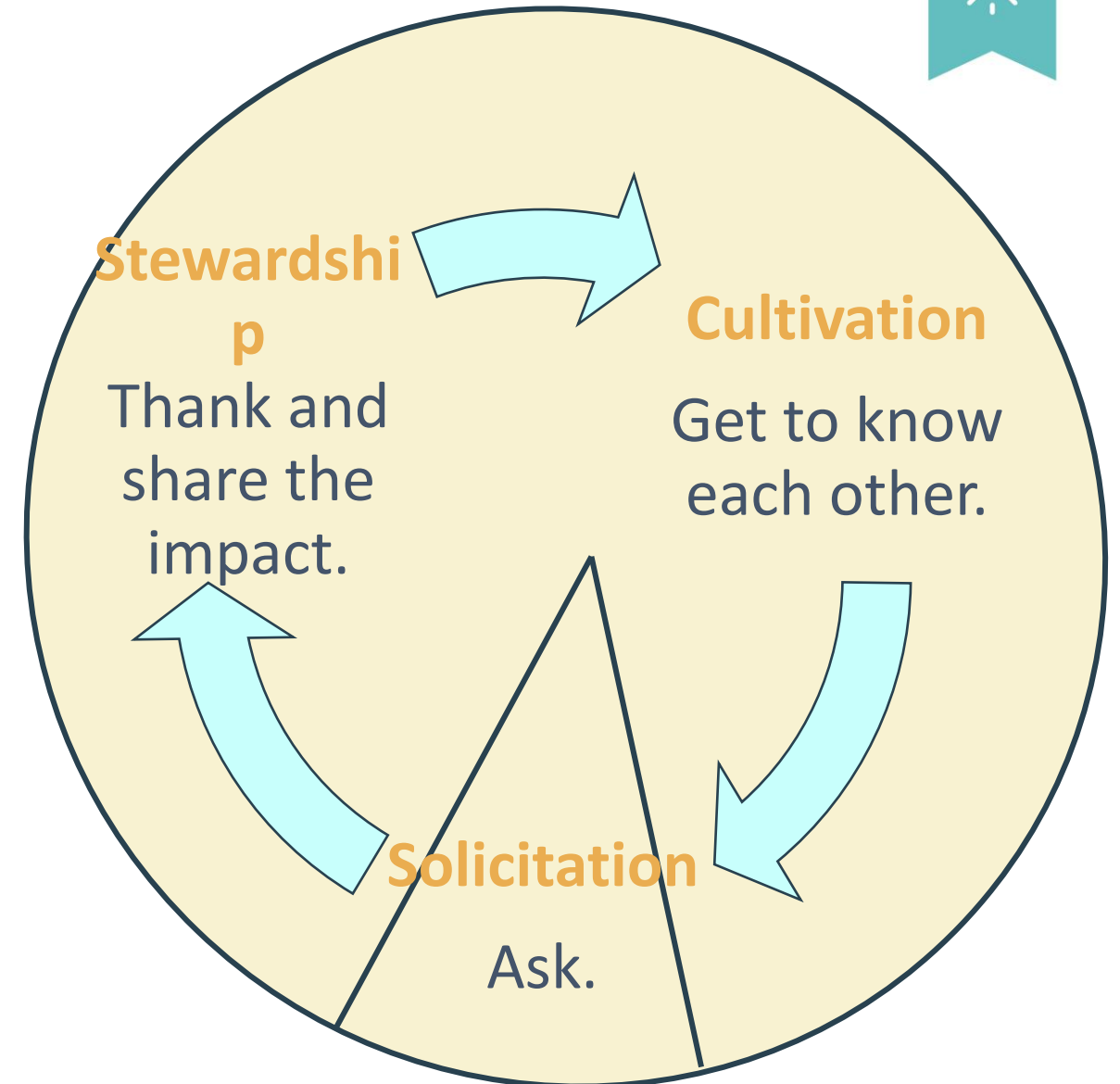


# Fundraising Building Blocks

PROCESSES	DATA	PLATFORM	MESSAGES
Thank	Gifts	Website	The index card “Why”
Record	Donors	Email	Case for Support
Report	Moves	Other	Segments

# PROCESSE S

- **Beginner**: thank
- **Intermediate**: thank in segments
- **Advanced**: thank in segments + orient
- **Everyone**: report back



# DATA



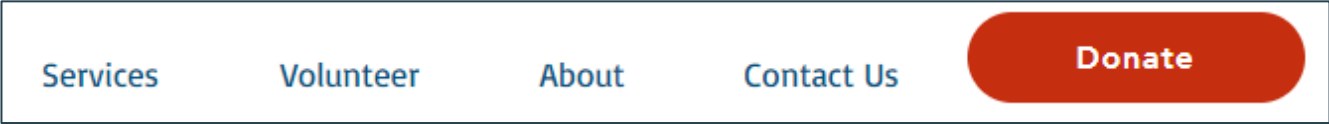
A **spreadsheet** will do the trick!

	<b>Gifts</b>	<b>Donors</b>
Beginner	Date Amount Donor Name	Name Contact Info
Intermediate	Method Origin (Strategy)	Affiliations Interests Favorite Strategies
Advanced	Portfolio Owner Target Gift	Capacity Moves



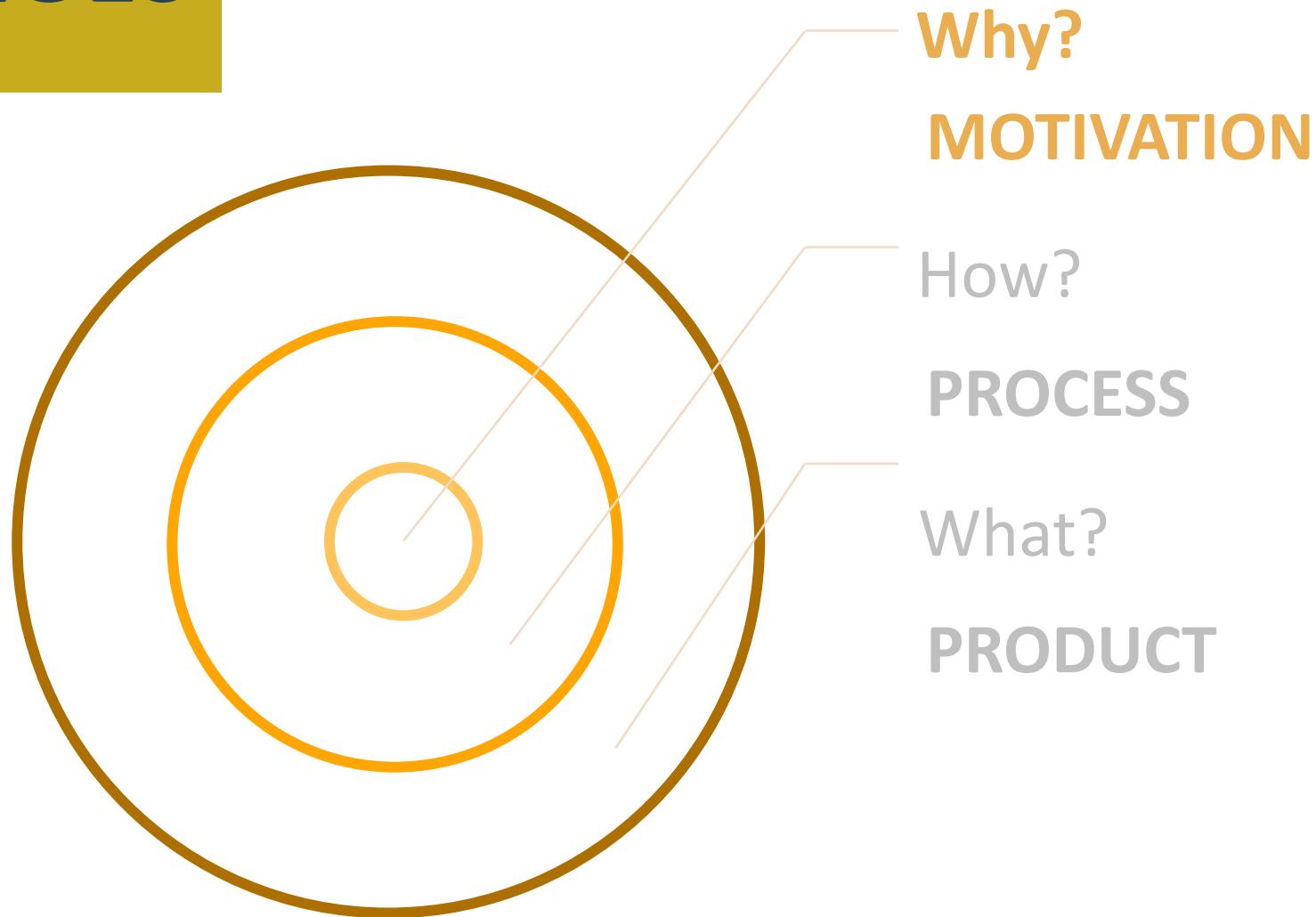
# PLATFORM

- Website!
- Email
- Social
- Phone
- Text





# MESSAGES







# Keep the Plan Alive:

1) Track progress towards goals.

Strategy	Budget	Stretch Goal	Progress So Far	Remaining to Go
Spring Event	\$20,000	\$30,000	\$5,000	\$15,000
Major Donors	\$8,000	\$15,000	\$3,000	\$5,000
Grants	\$12,000	\$25,000	\$6,000	\$6,000
<b>Totals</b>	<b>\$40,000</b>	<b>\$70,000</b>	<b>\$14,000</b>	<b>\$31,000</b>



# Keep the Plan Alive:

2) Regularly ask for help.

Strategy	Budget	Stretch Goal	Progress So Far	Remaining to Go	Status
Spring Event	\$20,000	\$30,000	\$5,000	\$15,000	On Track
Major Donors	\$8,000	\$15,000	\$3,000	\$5,000	Need Help!
Grants	\$12,000	\$25,000	\$6,000	\$6,000	On Track
<b>Totals</b>	<b>\$40,000</b>	<b>\$70,000</b>	<b>\$14,000</b>	<b>\$31,000</b>	



# Keep the Plan Alive:

## 3) Break down large tasks into smaller tasks.

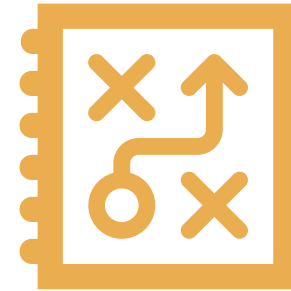
Tactic	Deadline	Lead
Review list of major donors (current and lapsed) and assign to portfolios	1/5/24	Sam
Make a menu of stewardship moves and share with development committee	1/31/24	Sam
Every major donor gets 2 moves	4/30/24	Portfolio Owners
Every major donors gets 5 moves	7/31/24	Portfolio Owners
Host training on how to make the ask	8/31/24	Gina
All major donors get personalized ask	10/31/24	Portfolio Owners
100% of major donors have given this year, and we have reengaged 50% of lapsed major donors.	11/30/24	Sam
Executive Director and Board makes personal thank you calls	12/31/24	Gina



# What We Learned Today



How to decide which fundraising strategies are right for you.



How to build a meaningful fundraising plan.



# Questions?

Contact me:

[brittany@cloudbreakcollective.com](mailto:brittany@cloudbreakcollective.com)

[www.cloudbreakcollective.com](http://www.cloudbreakcollective.com)