



# BIG DONATIONS DON'T HAPPEN BY ACCIDENT





Who is this guy?

And why does he think  
he knows what he's  
talking about?



# career fundraiser



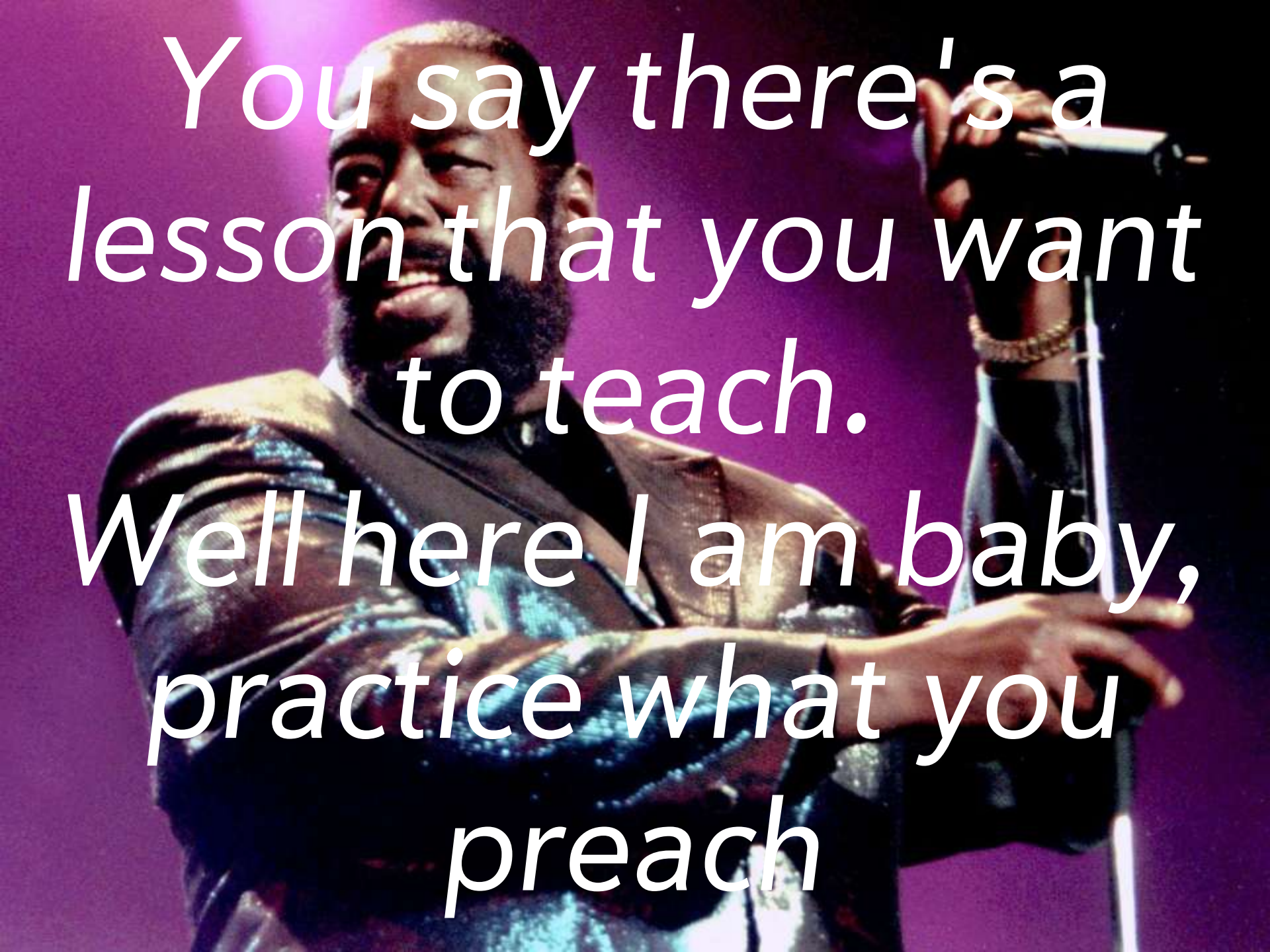
**CFRE™**



**productive**  
FUNDRAISING  
*with Chad Barger, CFRE*

*providing fundraising strategy,  
training & coaching to small nonprofit  
organizations*





*You say there's a  
lesson that you want  
to teach.*

*Well here I am baby,  
practice what you  
preach*



LITTLE  
BUFFALO  
CREEK  
TRAIL

Who are you?

And how much  
experience do you have  
with fundraising  
conversations?

# AGENDA

- 1) Fundraising 101 (in 6 slides)
- 2) Identifying Potential Major Donors
- 3) The Asking Process
- 4) Prioritizing Fundraising Contacts
- 5) Q&A



# Fundraising 101

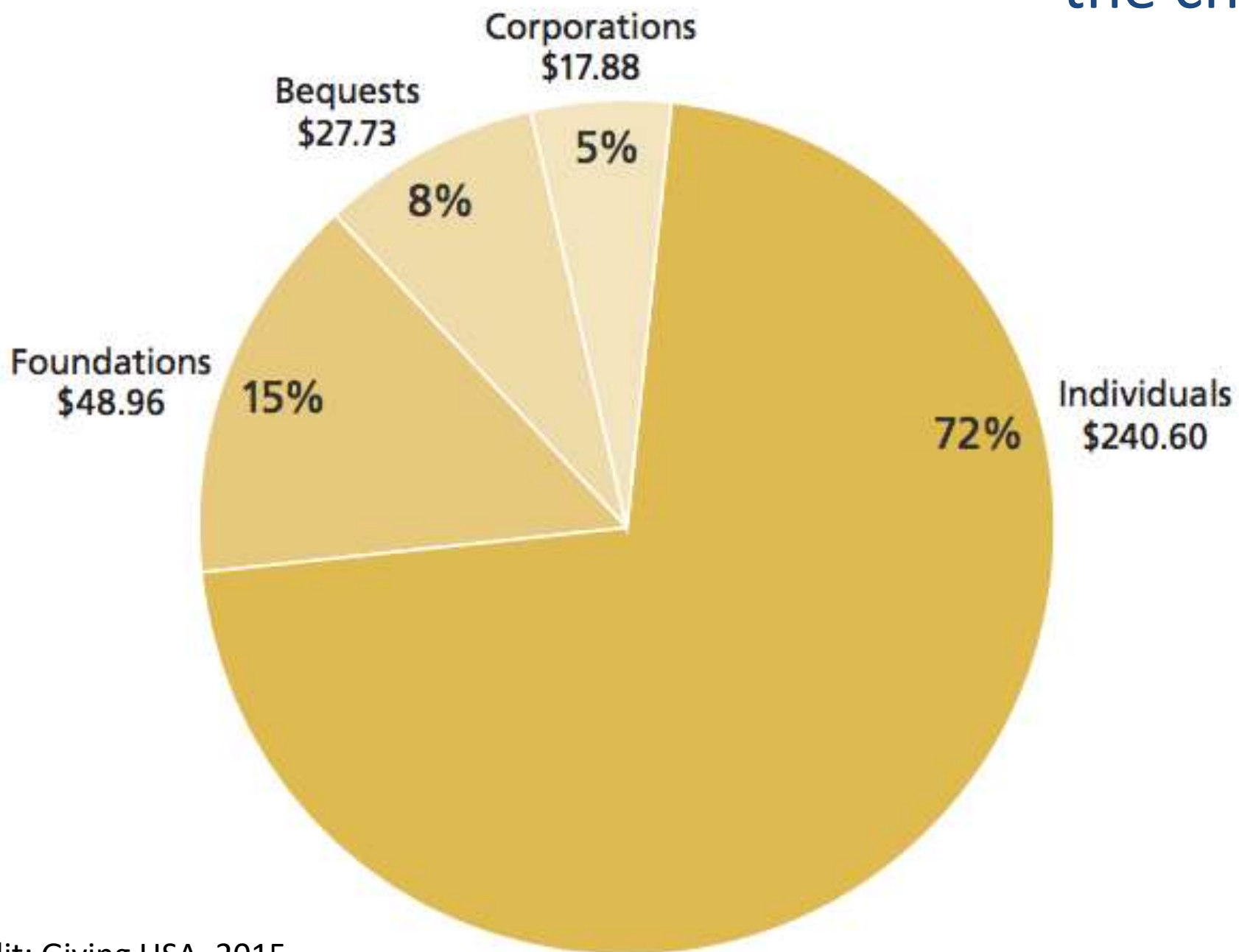
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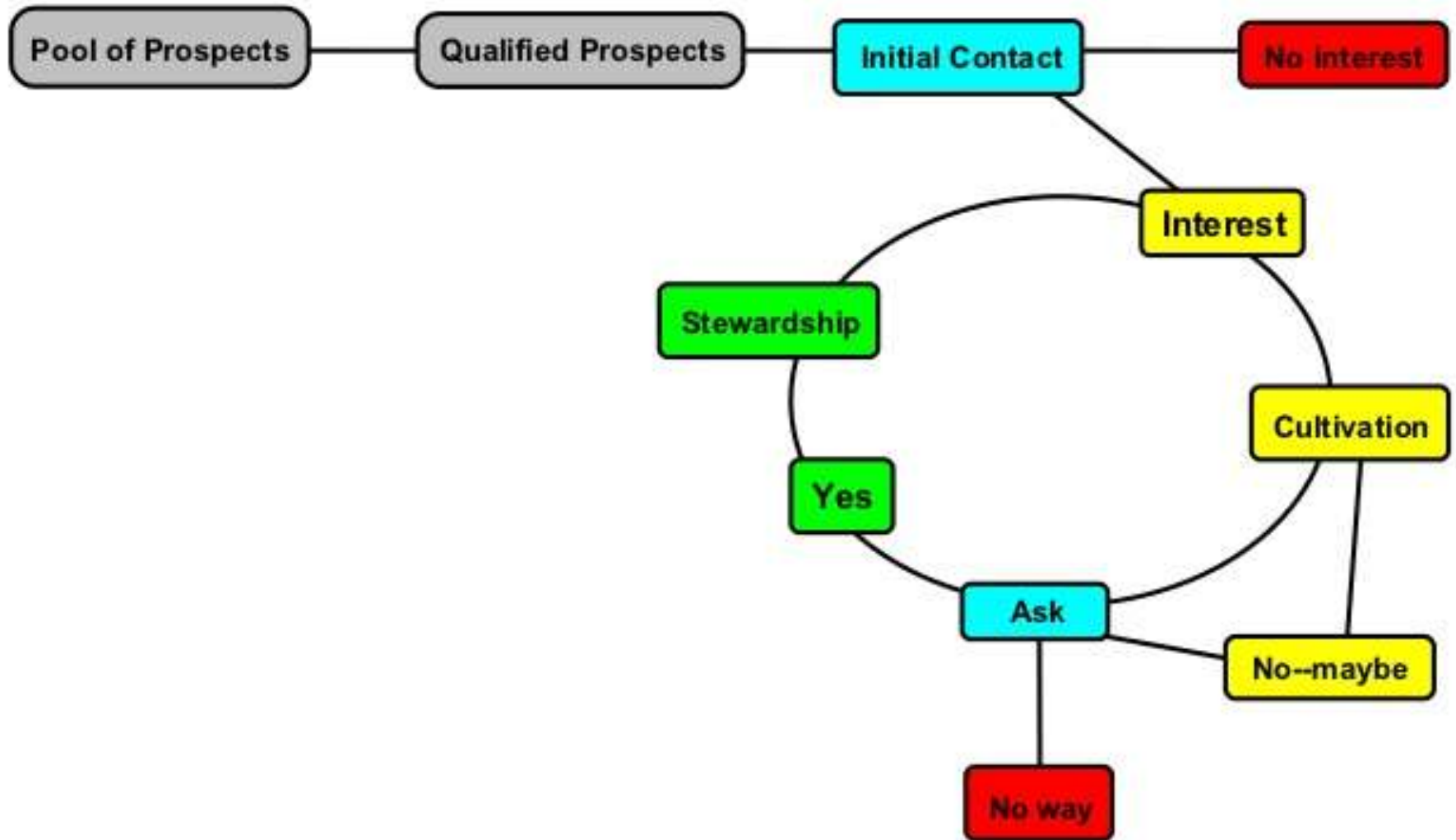


# the pyramid



the chart





In person

Peer to peer

By mail

By events

By email

Via crowdfunding

On a web site

By phone

By advertising

# donor centrisism

Does it make the donor feel  
important, valued &  
considered?

45%

29%

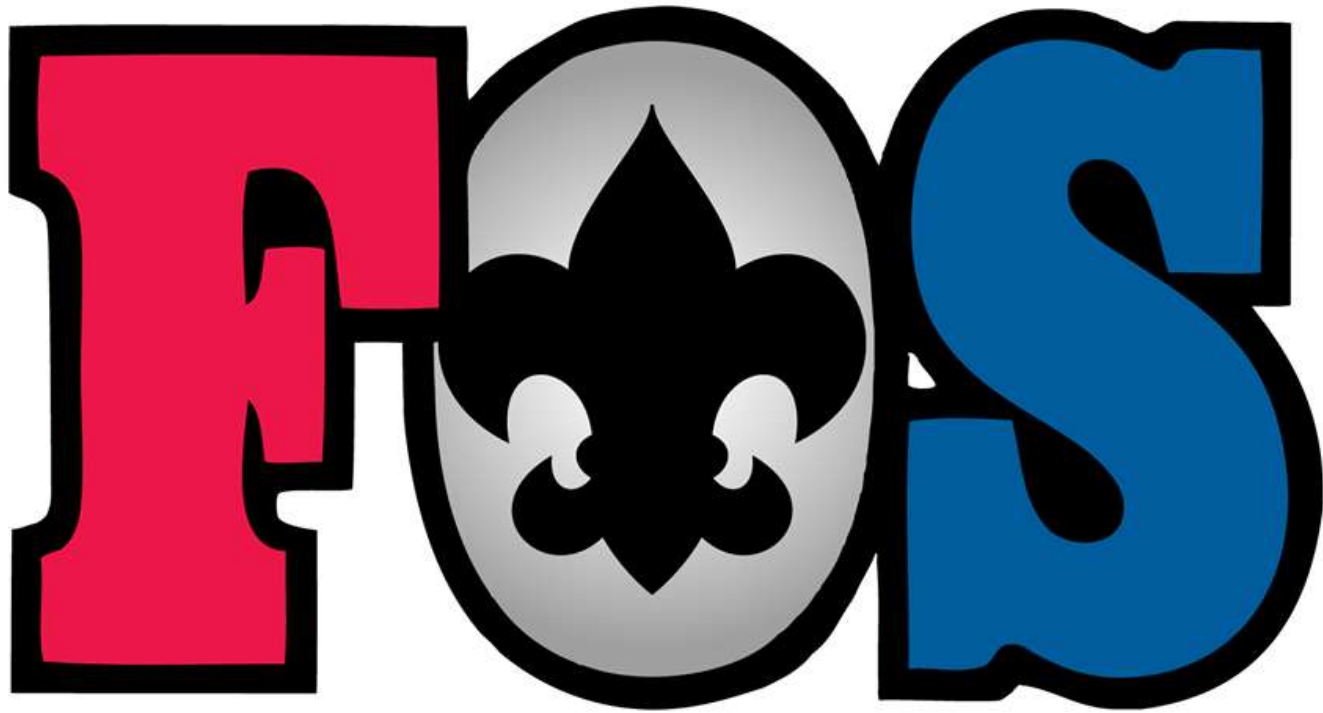
Begging=you have the power

Demanding=I have the power

Asking=we have a relationship

# Identifying Potential Major Donors





**FRIENDS OF  
SCOUTING**

*Make an investment in today's youth!*





# The Asking Process



The focus should  
not be on the ASK,  
it should be on the  
**CONNECTION.**

It's not how do we  
ASK people to give,  
it's how do we LET  
people give. It's an  
INVITATION.

What's the best  
way to extend that  
invitation?

**PEOPLE GIVE TO PEOPLE  
(NOT EMAILS)**



Not every visit has  
an ask (especially  
not first time visits).

Not all asks  
are for money.

# getting the visit









Dear Mr. Donor -

I hope all is well and that you're enjoying these late spring days!

My name is Chad Barger and I am the Development Director of the ABC Charity.

I am writing to see if I could stop by sometime in the next month or so to provide a **brief**

update on ABC Charity. I like to do this with as many of our supporters as possible each year. It's an opportunity for me to share our progress, to answer your questions and to **get some feedback** which is always appreciated.

I think **20 minutes** would be sufficient – is there a good day on your calendar? **What about the 20th at 2pm or the 22nd between 1 and 4pm?**

Thank you for your time and a wonderful day.

Sincerely, Chad

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# Different Approaches for Different Relationships

- A donor you know
- A donor you don't know
- A non-donor you don't know

# guiding the conversation



My thesis is  
Story (v)...



the most powerful form  
of communicating with  
another human being is  
asking them a question

*Ask  
open-ended  
questions*





# FIND CPI

(common points of interest)

*Small talk*

KNOW | LIKE | TRUST

# the transition



# Chad's Favorite Donor Visit Questions

So, as you know I wanted to speak about ABC Charity today ...

- What do you know about us?
- What first led you to become involved with our organization?
- What excites you about our current programming?
- What could we be doing better?

A FEW

key talking points

# positioning the ask



no asks on  
first visits with  
people you don't  
already know well

The easiest way to  
make an ASK ...

**CONSIDER &  
JOIN ME**

“I hope you’ll  
**CONSIDER JOINING**  
**ME** in supporting this  
program with a  
donation of \$5,000.”

“I hope you’ll  
**CONSIDER JOINING**  
**ME** in advancing this  
program by serving  
on the task force.”



# closing the meeting





**Small talk**

**KNOW | LIKE | TRUST**

GET

PERMISSION

# What's Next?

---

①

More information

②

Proposal / offer

③

Follow up call /  
meeting

**GET  
PERMISSION AT  
THE MEETING**



# following up



But what do you need  
to do before you follow  
up with your planned  
next step?



*Thank you ...*

# The 3 Minute / 3 Sentence Thank You Note Formula

sentence 1 = what you saw / what happened

sentence 2 = the impact of what you saw on  
you or your organization

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VANCE -

THANKS AGAIN FOR TALKING  
THIS TIME TO MEET WITH  
ME THIS WEEK. I'M CONFIDENT  
THAT BY WORKING TOGETHER WE  
CAN BOTH INCREASE OUR IMPACT  
ON THE LOCAL ARTS SCENE. I  
GREATLY APPRECIATE YOUR  
DEDICATION TO  
THE CAUSE! ♡

THANKS AGAIN,  
CHAD

 **CULTURAL ENRICHMENT FUND**  
PO Box 1204 - Huntington, VA 22404



Joe D...  
105 Main St  
Annapolis, VA 20705



Dear \_\_\_\_\_

\_\_\_\_\_



# Follow up guidelines: 4x

1 week after the ask

2 weeks after that

4 weeks after that

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# Prioritizing Donor Visits



set a visit goal

block time for visits  
(2 hours incl travel)

block time for  
scheduling visits

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*The End!*

# further learning



# questions

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