productive FUNDRAISING with Chad Barger, CFRE

How to Fix Your Productivity to Amp Up Your Results

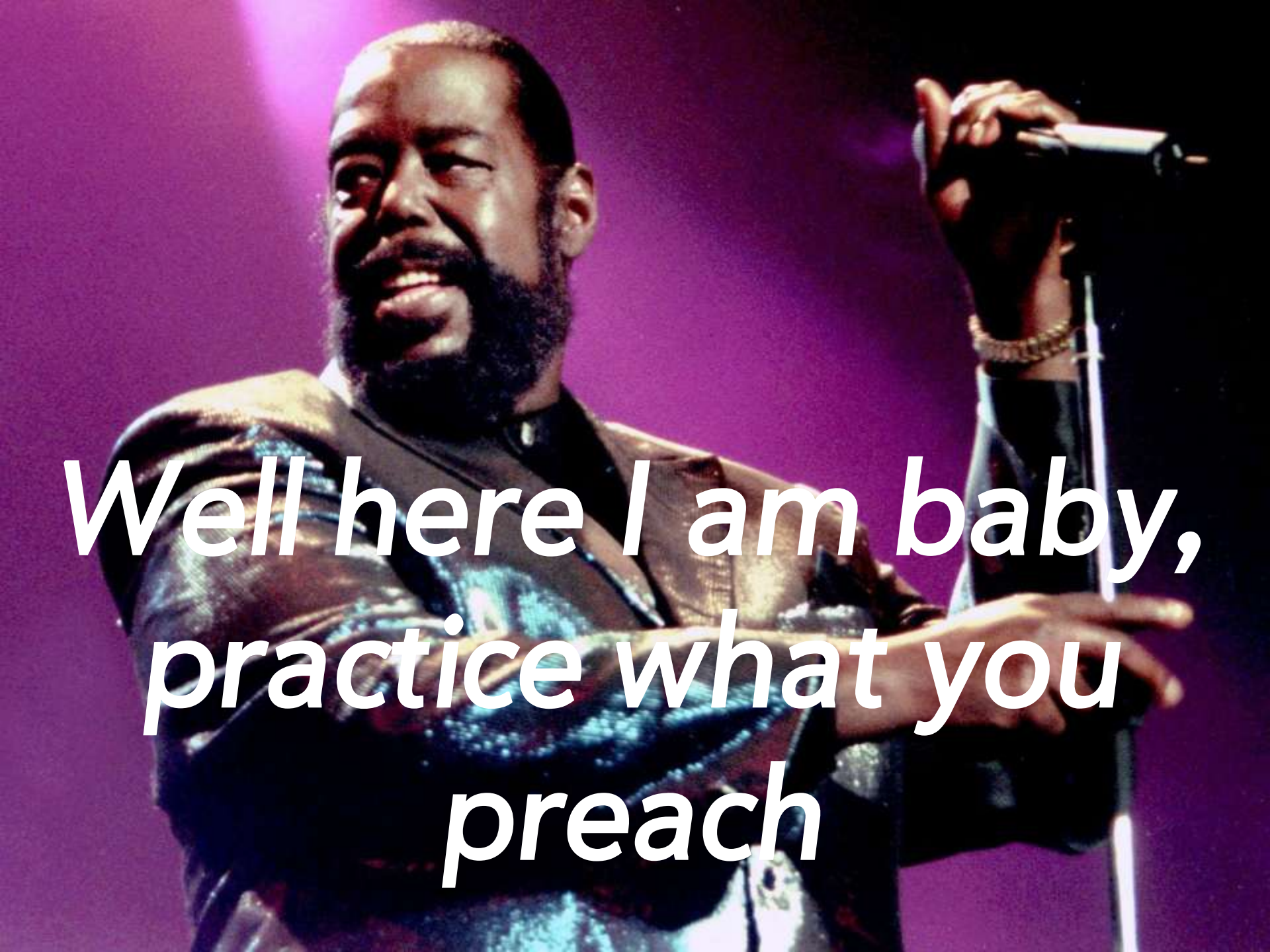
Who is this guy?

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

career fundraiser

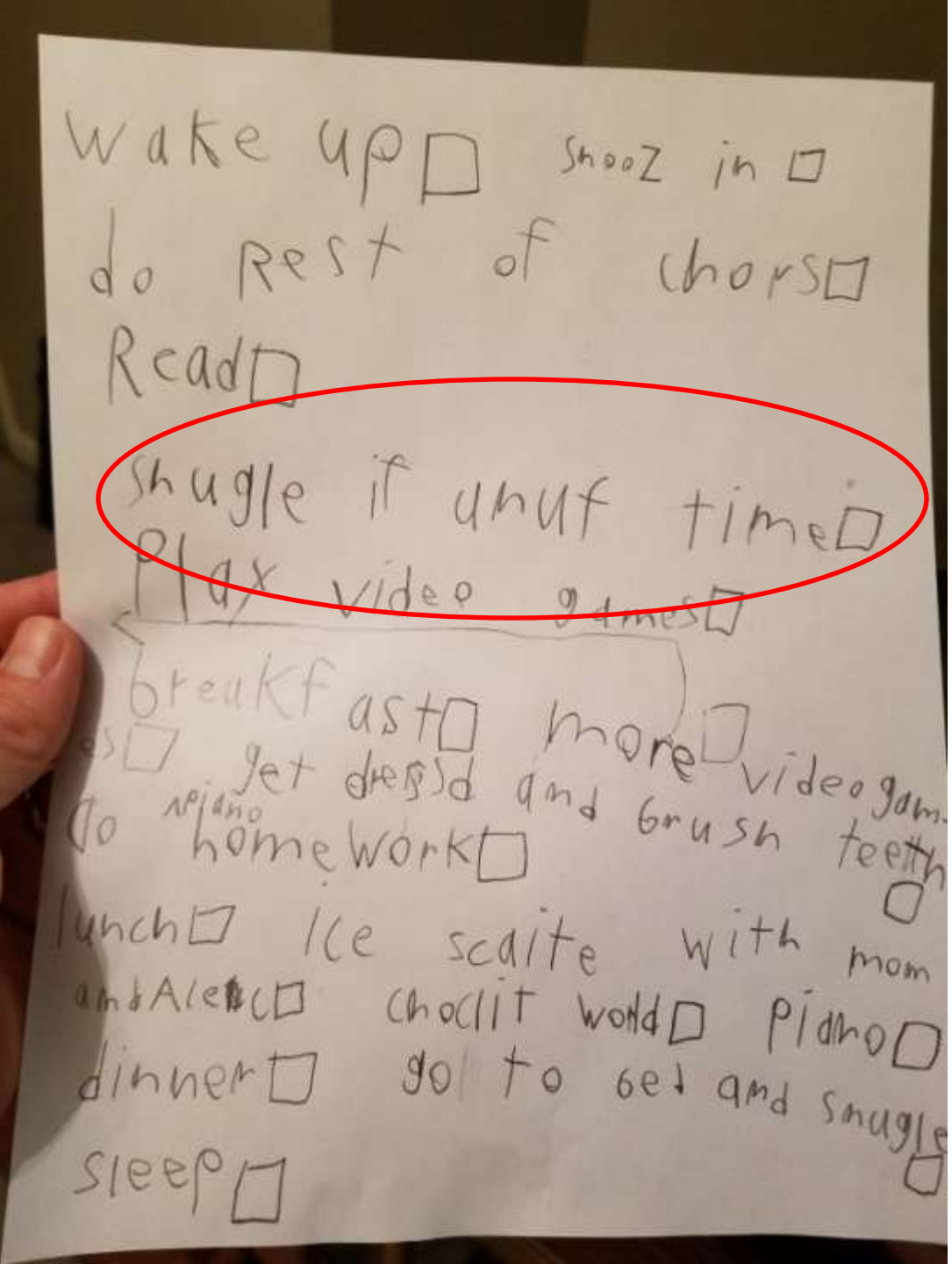
CFRE™

teaching small, community-based charities to fundraise more effectively


Well here I am baby,
practice what you
preach

A confession ...

productive
FUNDRAISING



systems guy

1) Focus on the basics

2) Build the system

3) Put it on autopilot

#productivitynerd

STORY TIME
why
productivity?

BAND REHEARSAL
AREA
USE CAUTION
WHEN PARKING

AMERICORPS
A

16 areas that the productive fundraiser should focus on to fulfill their organization's mission by working smarter, not harder

AGENDA

1) Hack Categories 1 thru 8

2) Your Personal Productivity Style

3) Hack Categories 9 thru 16

4) Crowd Sourced Hacks / Q&A

slides?

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hack (n)

a strategy or technique adopted in order to manage one's time and daily activities in a more efficient manner

50% productivity

50% fundraising

#1 Manage Your Time, Energy & Attention

English Jane Finch 0 Talk Preferences Watchlist Contributions

Notifications

Johnny Demo mentioned you on **User talk:Johnny Demo.**
Responded to Jane
33 minutes ago | View changes

Johnny Demo posted on your **talk page.**
Hi Jane: *new section*
41 minutes ago | View changes

Johnny Demo thanked you for your edit on User talk:Johnny Demo.
Hi Demo: *new section*
38 minutes ago | View edit

All notifications **Preferences**

TEA Framework

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#2 Have a Plan & Make Daily Progress

Have a plan, period.

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#3 Avoid Meetings & Maximize Those That You Can't

I SURVIVED
ANOTHER
MEETING
THAT SHOULD HAVE
BEEN AN
E-MAIL

Phone Call with Ashley

Times are in Eastern Time - US & Canada

Select from this calendar to set up a phone call to get to know each other! I'll give you a call at your selected time.

I'll Call You

Select a Day

– TODAY –

Mon Nov 27	Tue Nov 28	Wed Nov 29	Thu Nov 30	Fri Dec 1	Mon Dec 4	Tue Dec 5
	unavailable	unavailable				

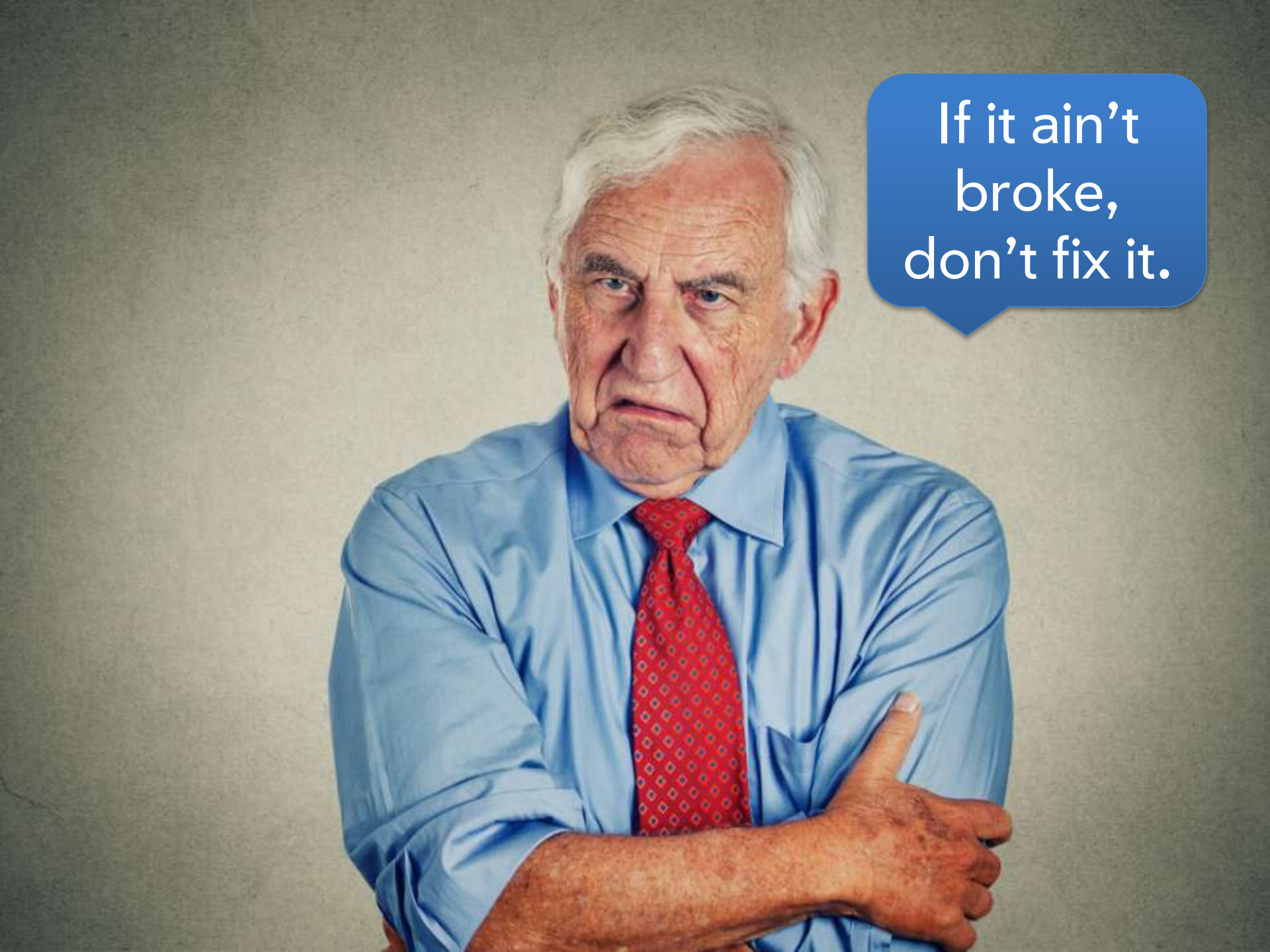
THIS WEEK NEXT WEEK

X

I. Call to Order
II. Introductions
III. Consent Agenda
    A. Minutes
    B. Executive Director's Report
    C. Committee Reports (no requiring action)
IV. Financial Report
V. Strategic Discussions
VI. Old Business
VII. New Business
VIII. Adjournment

Who is going to do what by when?

#4 Learn Something New Every Day


If it ain't broke, don't fix it.

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pocket

#5 Play Your Part to Promote Donor Retention

45%

Fundraising Effectiveness Project (FEP)

RETENTION >
ACQUISTION

People give to folks that they KNOW, like and trust

People KEEP GIVING to folks that they KNOW, like and trust

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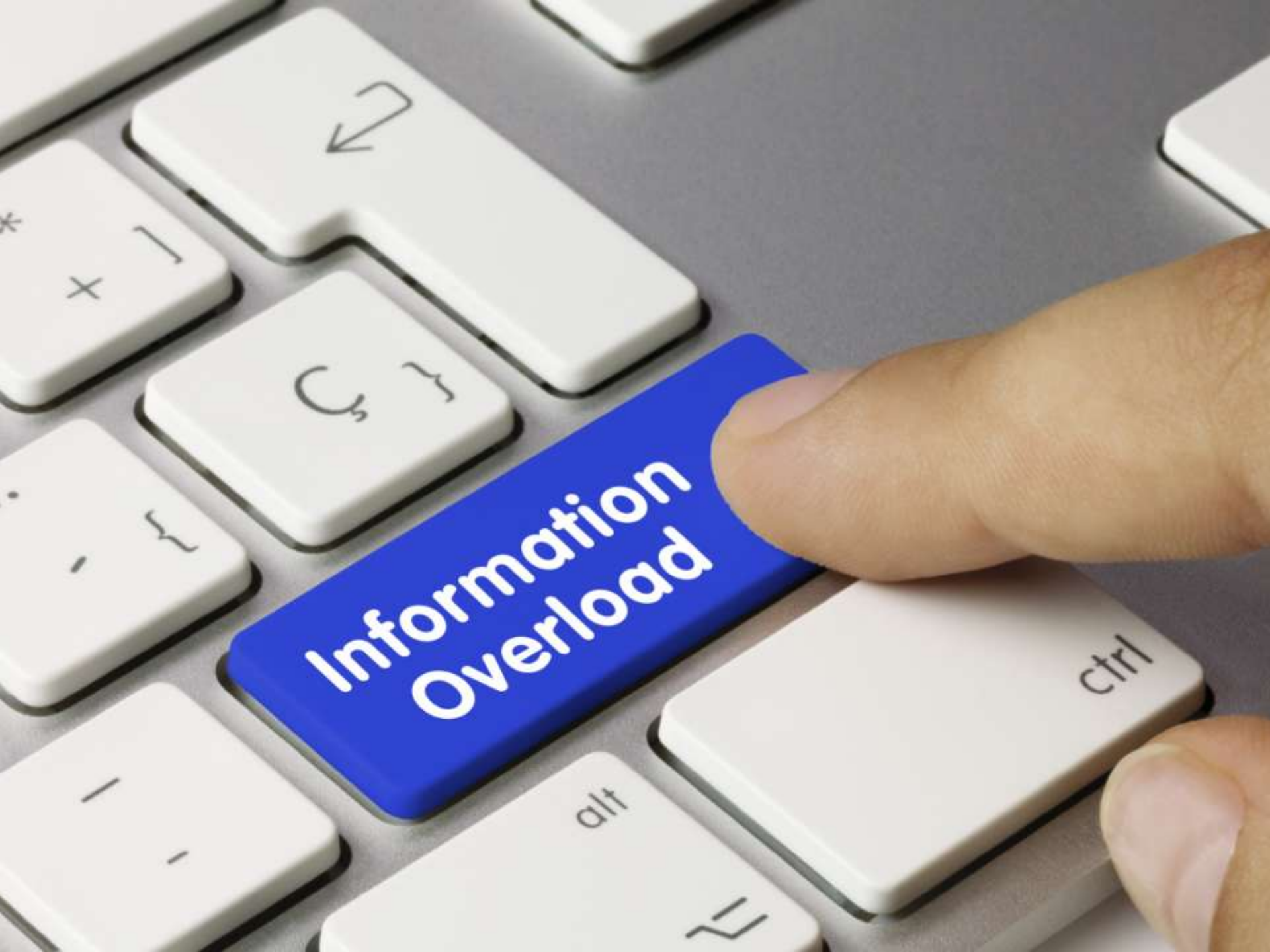
Seattle Milk Fund
2013-2014 Annual Report Card
162
Child Care Grants
118
Family Support Grants
86
Education Grants
4,000+
Volunteer Hours
Congrats to our recent grads!
We wish you all the best.
Visit seattlemilkfund.org for
Zahra's remarkable journey.
$261,548
Total awarded to students
and their families
Empowering parents toward higher education opportunities
by funding child care grants and providing family support.

YWCA
IS ON A
MISSION
ANNUAL REPORT
844 PEOPLE
388 ADULTS & 489 KIDS
PARTICIPATED IN YWCA
HOUSING PROGRAMS
415 PEOPLE
PARTICIPATED IN
JOB TRAINING
& TRANSPORTATION
PROGRAMS
2906
PEOPLE
PARTICIPATED
IN EQUITY
PROGRAMS
MAJOR
DONORS
GAVE IN 2015
$516,546
138
VOLUNTEERS
3170
HOURS

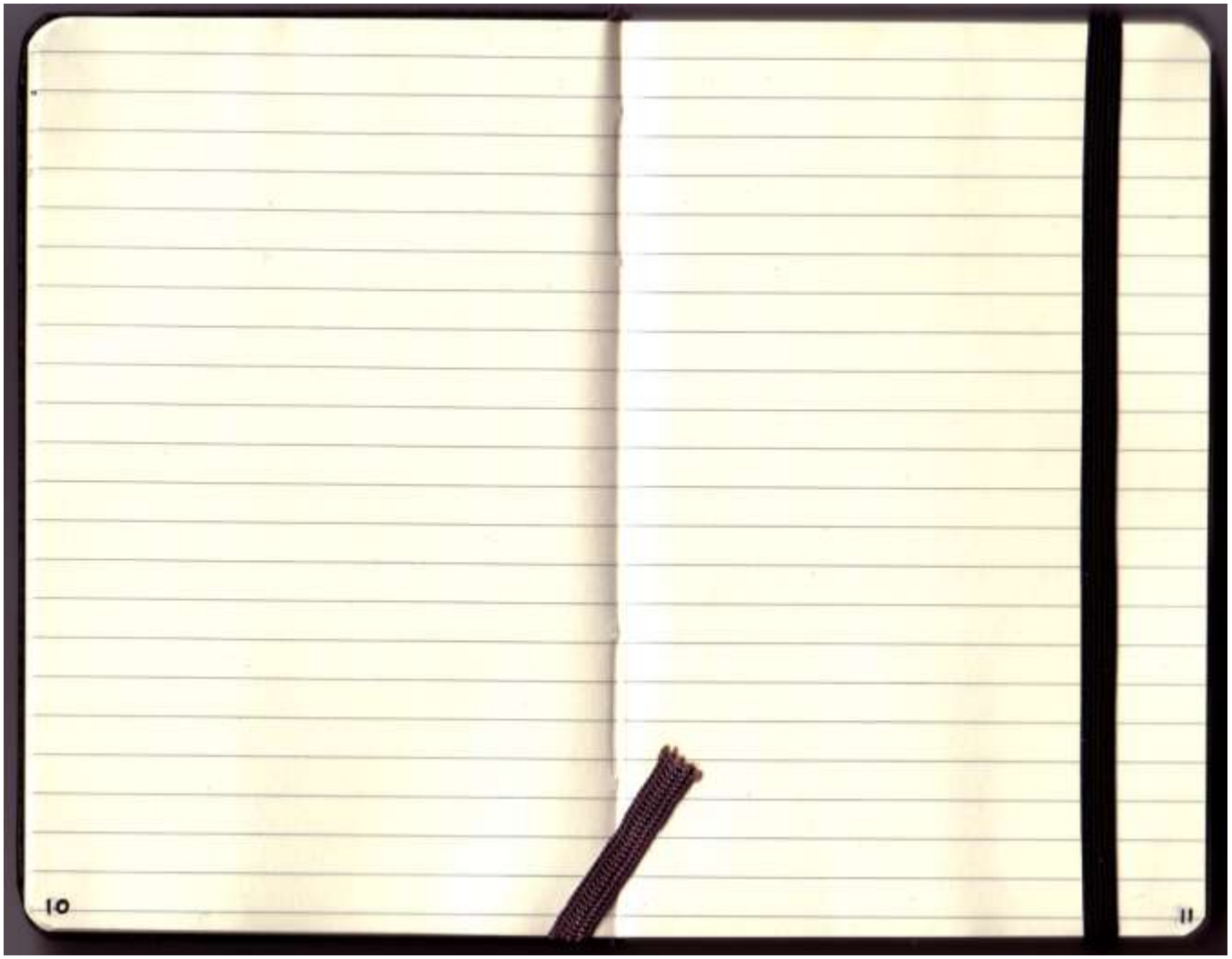
#6 Develop a Personal Productivity System That You Can Trust


Information
Overload
ctrl
alt

TO DO LIST

“Your mind was meant to be a factory, not a warehouse.”

– Mike Vardy


10
11

ADD
NOTE TO
PRESENTATION
NEW
Suave
MEN
2x
Fresh & Clean
HYDRATING
RUSH
THE REAL SHAVING CO.
PROFESSIONAL FORMULA
Daily
Facial Scrub
INVIGORATING
125 ml

#7 Regularly Meet with Supporters & Let Them Do The Talking

This is
My Story...

Ask
open-ended
questions

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?

#8 Travel Smart

FRIZZ-EA

Your Personal Productivity Style

PERSONAL PRODUCTIVITY

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PRIORITIZER

PLANNER

ARRANGER

VISUALIZER

There is no RIGHT or WRONG style.

The key is knowing your style & OWNING IT

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Back to the hacks ...

#9 Hold Focused Special Events for the Right Reason

walk/run

golf tournament

talent show

casino night

auction

gala

yard sale

bingo

raffle

bake sale

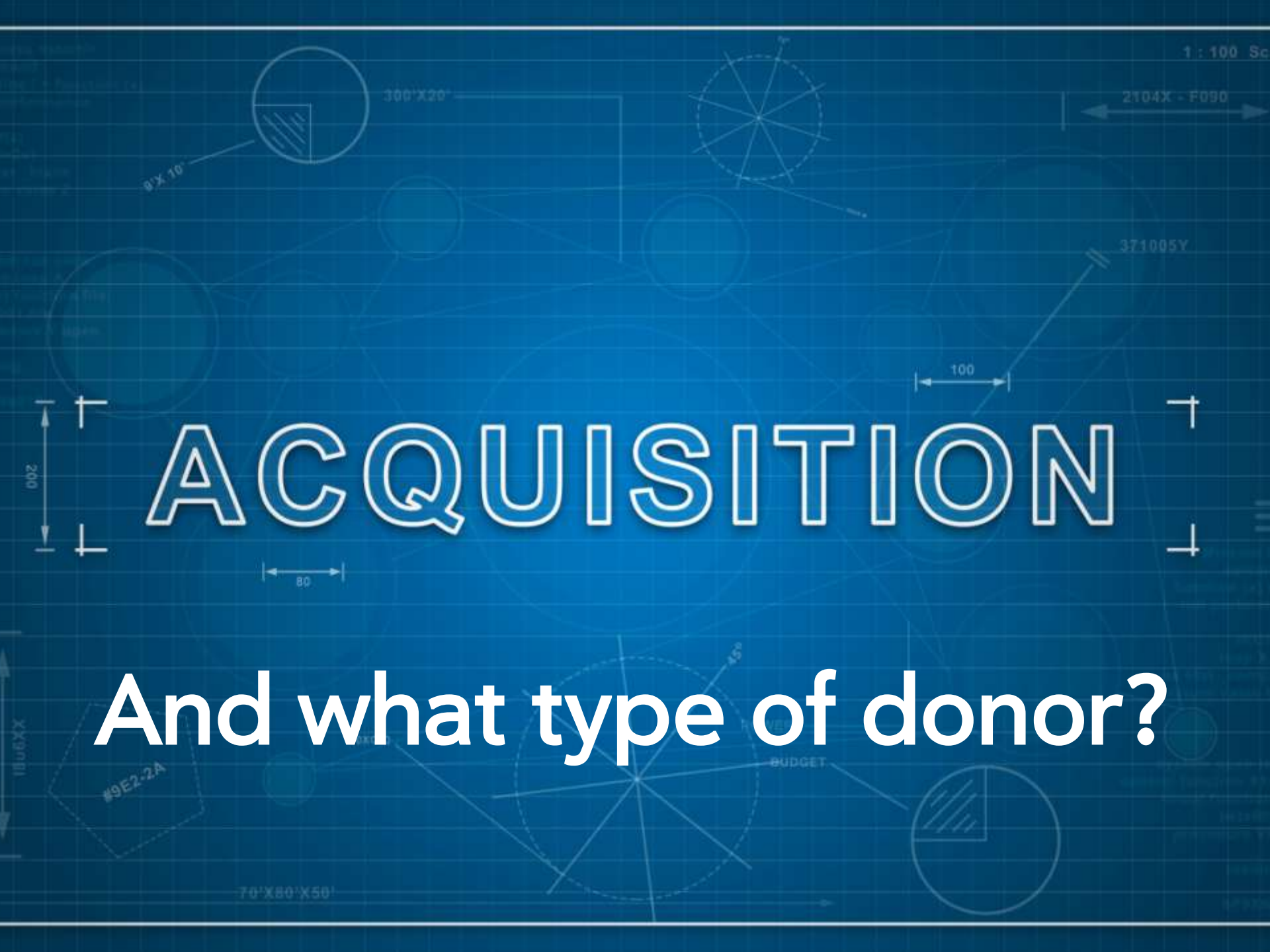
bake sale

awards banquet

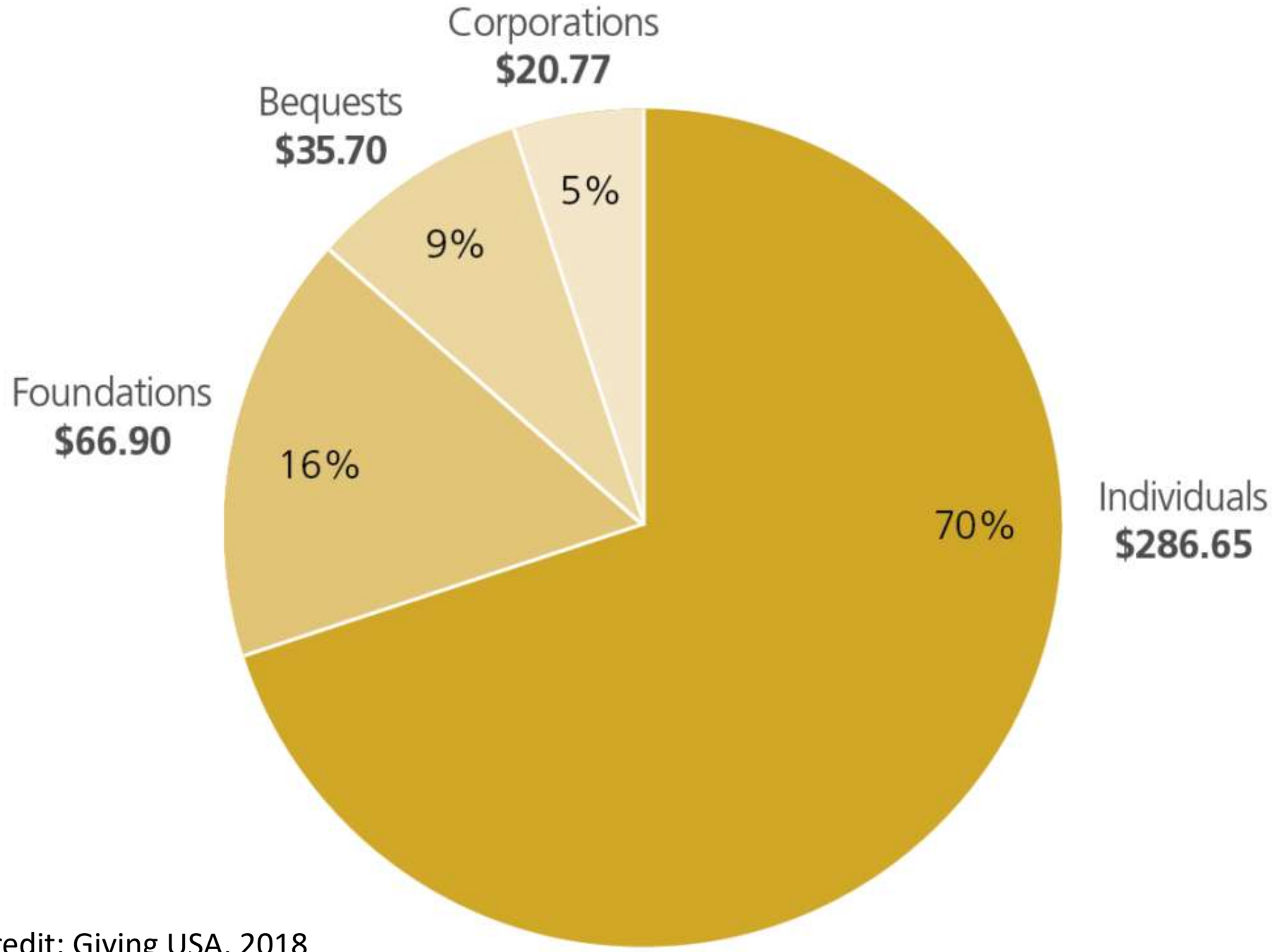
What's the first thing people suggest as a way to raise money for a charity?

RAZR

What should be the primary purpose of a fundraising event?



And what type of donor?



Credit: Giving USA, 2018

The primary purpose of fundraising events should be to find new individual donors.

#10 Write Donor Centric Communications & Avoid Business Speak

Blah blah blah since 1958 blah blah blah our founder's vision blah blah cutting-edge blah blah sustainable blah blah we are so dang awesome!

We raised
We accomplished
We met our goal

You made a difference
With your help, ...
With the support of our donors,

#11 Proactively Manage Your Email

Compose
Inbox (179)
Drafts
Sent
Spam (85)
Trash
179 unread emails

schedule & triage

SaneBox

#12 View Grant Opportunities with a Critical Eye

BEWARE:

mission creep

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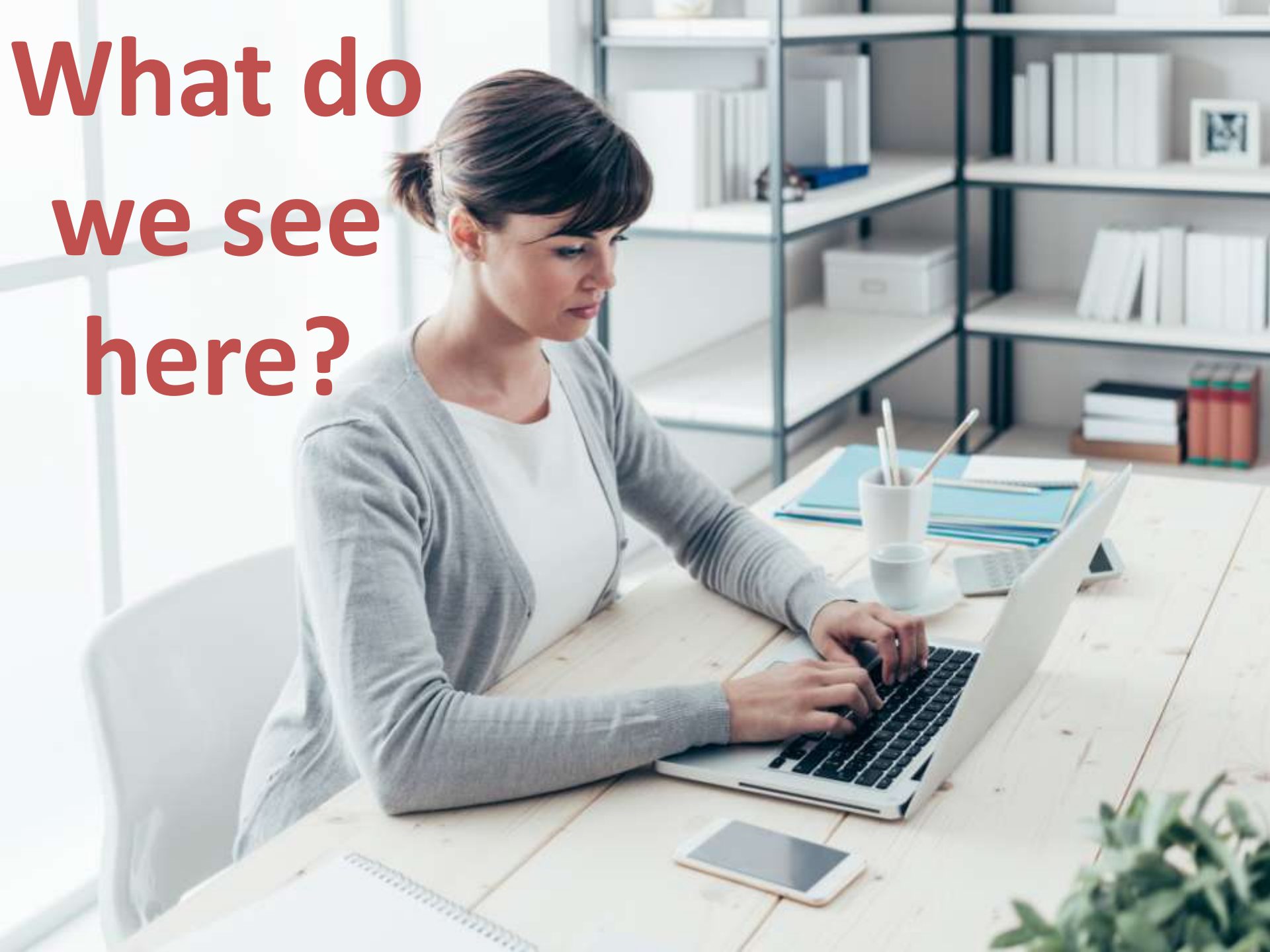
What do we see here?



OUTSOURCE
IT!

#13 Evaluate, But Don't Over Analzye, Results

Revenue
Current Month
Amount
% of Sales
Year to Date
Amount
% of Sales
Gross sales
1,250,000
45
2,720,000
34
Less sales returns and allowances
180,000
60
800,000
48
Net sales
1,070,000
1
1,920,000
1
Cost of Sales
Current Month
Amount
% of Sales
Year to Date
Amount
% of Sales
Beginning inventory
540,000
1
45,000
0
Plus goods purchased/manufactured
123,000
0
250,000
0
Total goods available
200,000
0
295,000
0
Less ending inventory
38,000
0
200,000
0
Total cost of goods sold
20,000
0
95,000
0
Gross profit (loss)
1,050,000
1
1,825,000
1
Operating Expenses
Current Month
Amount
% of Sales
Year to Date
Amount
% of Sales
Selling
Salaries and wages
122,000
0
65,000
0
Commissions
112,000
0
32,000
0
Advertising
338,000
0
22,000
Depreciation
10,000
0
37,000
Total selling expenses
579,000
1
General/Administrative
Salaries and wages
20,000
Employee benefits
33,000
Payroll
Insurance
Rent
Utilities
Depreciation
Name : EXPENSES
Actual Cost Breakdown
$300,00
$500,00
8%
13%
21%
16%
21%
PROFIT AND LOSS
BALANCE SHEET

9 point performance index

1. **Participants + Non-Responders**
2. **Income**
3. **Expense**
4. **Percent Participation**
5. **Average Gift**
6. **Net Income**
7. **Average Cost Per Gift**
8. **Cost of Fund Raising**
9. **Return**

Credit: Jim Greenfield

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Solicitation Performance Index

based on James M. Greenfield's Nine-Point Performance Index

PERFORMANCE INDICATOR	SOLICITATION 1	SOLICITATION 2	SOLICITATION 3	SOLICITATION 4	SOLICITATION 5	SOLICITATION 6	SOLICITATION 7	SOLICITATION 8	SOLICITATION 9	TOTALS
Solicitations Made/Sent										-
1. Participants										-
2. Income										$ -
3. Expense										$ -
4. Percent Participation										#DIV/0!
5. Average Gift										#DIV/0!
6. Net Income										$ -
7. Average Cost Per Gift										#DIV/0!
8. Cost of Fund Raising										#DIV/0!
9. Return	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!

DATA YOU ENTER

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#14 Seek Work Life Harmony, Not Balance

LIFE
WORK

work self

home self

just be your self

automate the delivery of your weekly/monthly essentials

2-2-2

ZOMBIE APOCALYPSE

WHAT WE THINK IT LOOKS LIKE:

WHAT IT REALLY LOOKS LIKE:

#15 Work to Build a Fundraising Board

What's the most frequent complaint voiced by nonprofit exec. directors?

JOB DESCRIPTIONS
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October
S M T W T
4 5
11 12 13
18 19 20
25 26 27
3
10
17
24
31

#16 Love Your Donors & Steward Them Appropriately

THASKING

3
2
4
1
5
6
7
0
8
9

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

sent productivefundraising.com/resources the

VANCE -

THANKS AGAIN FOR TAKING THE 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

5 before 10

(Wendy Taylor)

30

Crowd Sourced Hacks

time

energy

attention

meetings

travel

email

self care

fundraising

The End!

further learning

@fundraiserchad

4/25 @ 12pm (eastern)

https://www.leadershipharrisburg.org/programs/board-strong/

A program of:

LEADERSHIP HARRISBURG AREA
Leaders Serving.

In partnership with:

TFEC THE FOUNDATION FOR ENHANCING COMMUNITIES

Sponsored by:

ORRSTOWN BANK

FINAL FOCUS

questions

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