



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™



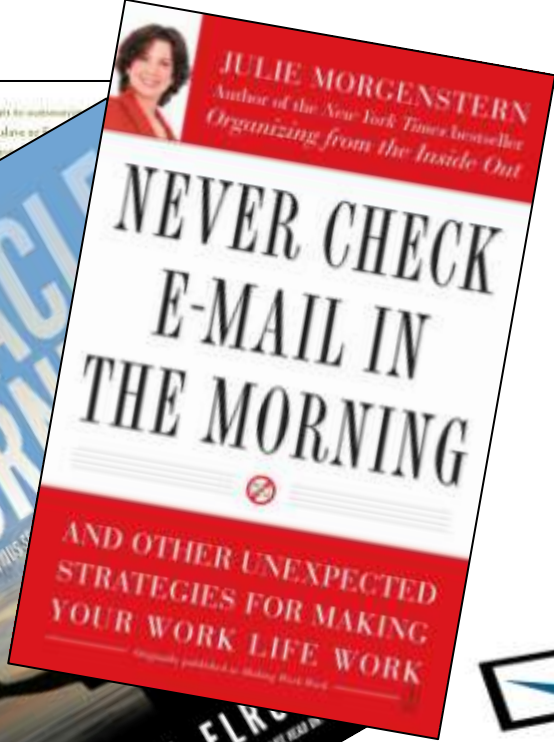
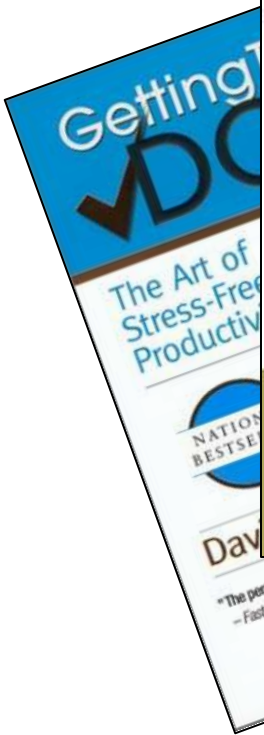
productive
FUNDRAISING



Raising funds for causes you care about shouldn't mean working 60+ hours per week, forever.



A confession ...



productive
FUNDRAISING

wake up shoes in
do rest of chores
Read
snuggle if unuf time
Play video games
breakfast more video games
get dressed and brush teeth
do ^{spiano} homework
lunch ice scuite with mom
amb Alex chocolit world pidno
dinner go to get and snuggle
sleep

systems guy

- 1) Focus on the basics
- 2) Build the system
- 3) Put it on autopilot



#productivitynerd

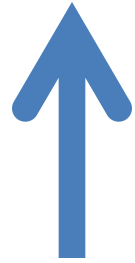
12 areas that the
productive fundraiser
should focus on to fulfill
their organization's
mission by working
smarter, not harder

50% productivity

50% fundraising

But what do we mean
when we use the term
PRODUCTIVITY?

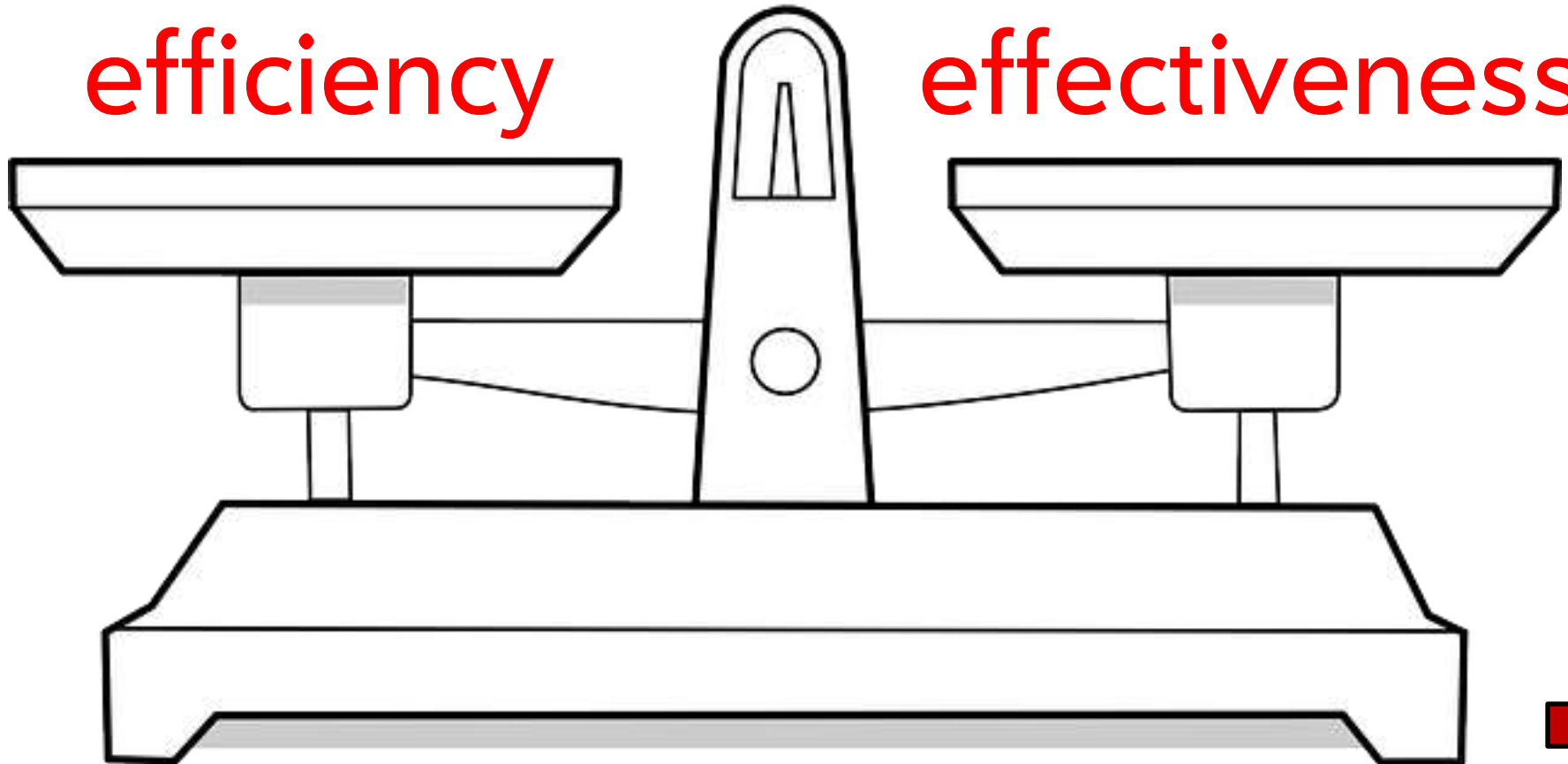
how you do it



what you do



efficiency



effectiveness



slides?

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#1 Manage Your Time, Energy & Attention















[Aあ 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**



Fisher-Price

Fisher-Price

Ages 4+

Now your kids can suffer just like you!

Grab your latte and get ready to join the conference call that never ends! From the hold music to the endless circular conversation, the Soul-Crushing Meeting playset will keep your kids busy for hours!

Comes with:
Conference Phone
Conference Table
4 Chairs
4 Coffee Cups

Soul-Crushing Meeting™

Conference Phone
Conference Table
4 Chairs
4 Coffee Cups



MADE WITH MÖMUS







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 >
ACQUISITION



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**Be creative
& stand out**



A graphic of a violin, with the body of the instrument serving as a frame for text. The violin is oriented vertically, with the headstock at the top. The body is outlined in a light purple color. The text is centered within the body. There are four registration marks (crosshairs) around the violin: one at the top right, one at the top left, one at the middle right, and one at the bottom left.

Because of you,
283,645

*residents of the capital
region had an*

**arts
experience**

last year.

*Thank you for your
ongoing support!*



Cultural Enrichment Fund
PO Box 12084
Harrisburg, PA 17108
Carrier: leave if no response

NO POSTAGE
NECESSARY
IF MAILED
IN THE
UNITED STATES
PERMIT NO. 1488

22*****5-DIGIT 17112
Mr. and Mrs. Anthony Pascott
633 Fishing Creek Valley Rd
Harrisburg, PA 17112-9631

Because of you,
283,645

*residents of the capital
region had an*

**arts
experience**

*last year.
Thank you for your
ongoing support!*



Cultural Enrichment Fund
PO Box 12084
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Carrier: leave if no response

NONPROFIT ORG
CSM
U.S. POSTAGE
PAID
TAMPA, FL
PERMIT NO. 1439

2*2*****5-DIGIT 17112

Harrisburg, PA 17112-9631

#6 Develop a Personal Productivity System That You Can Trust





TO DO LIST

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

- Mike Vardy

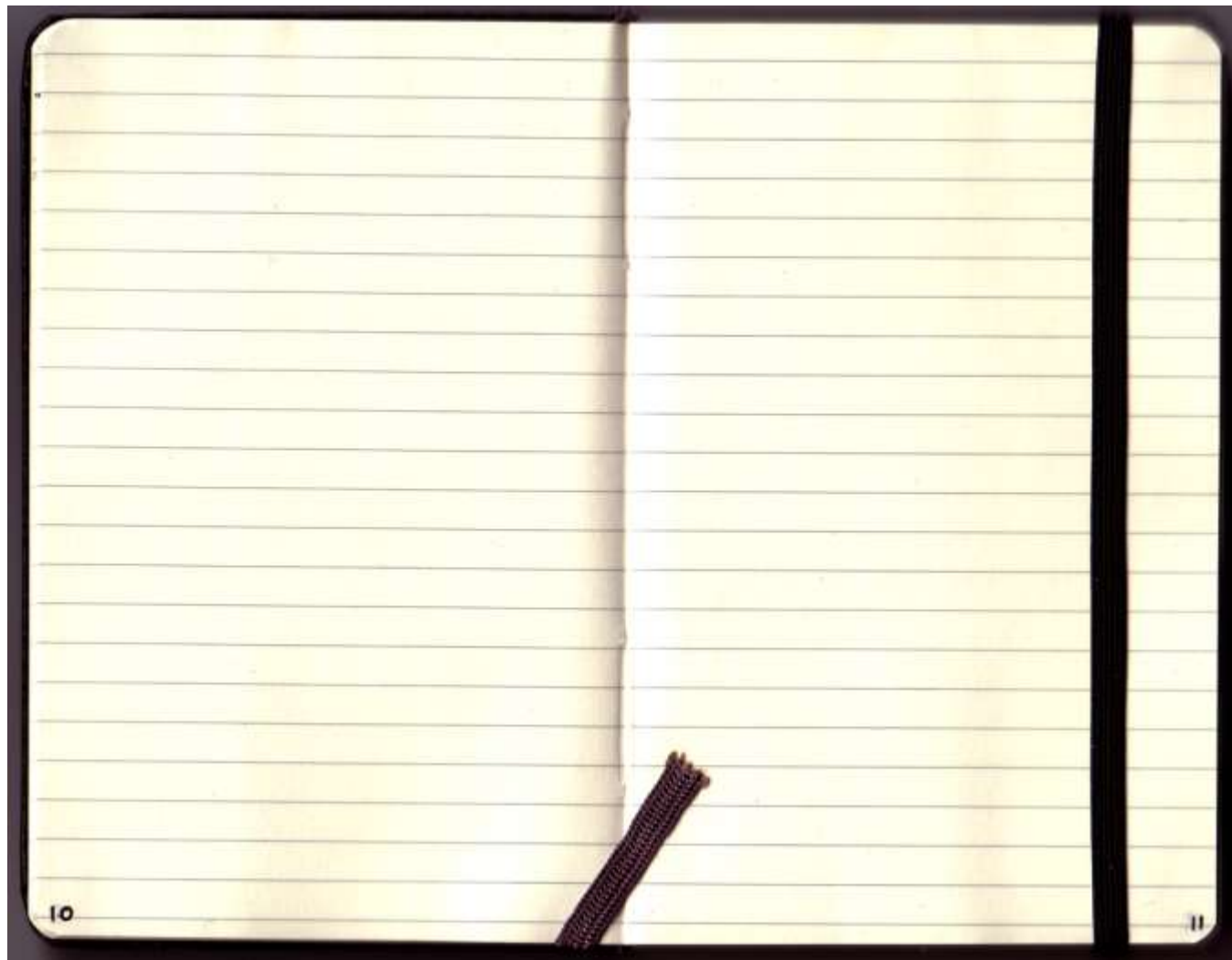
CARSON TATE

work
simply

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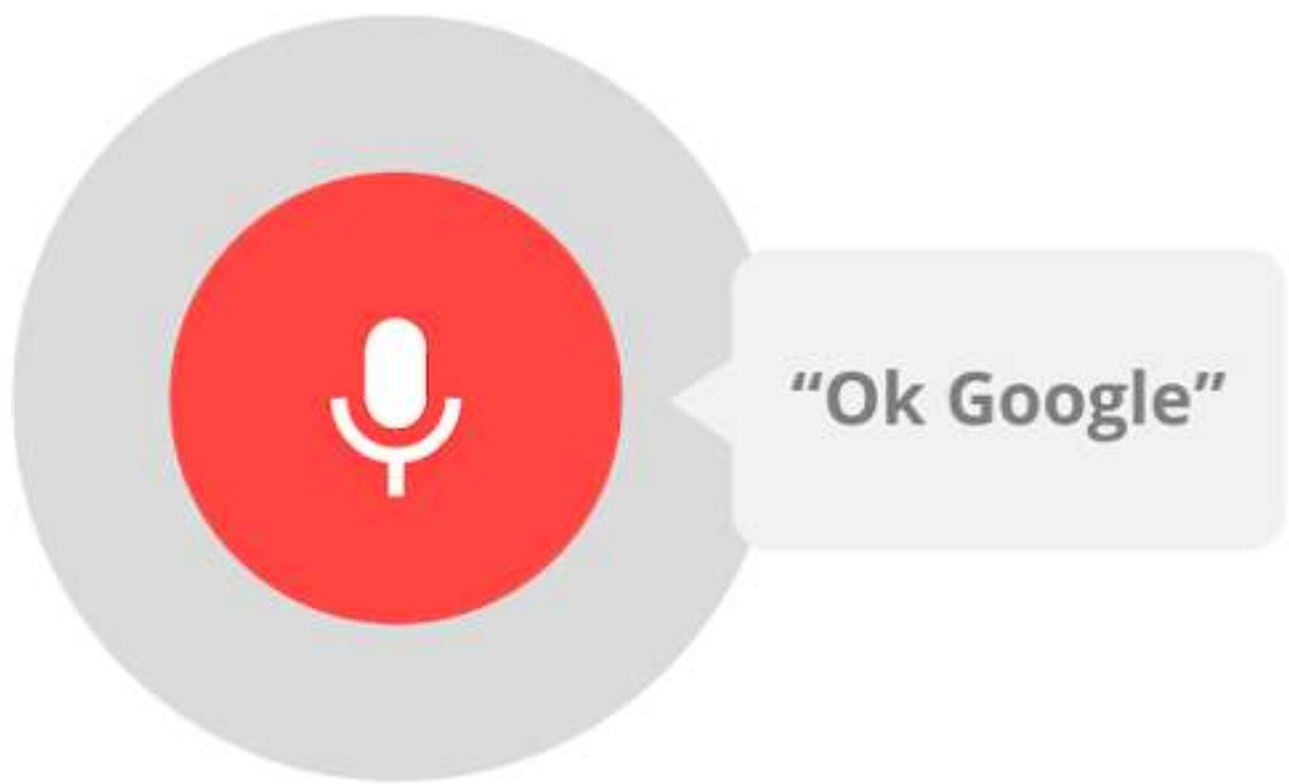
EMBRACING THE POWER OF YOUR
PERSONAL PRODUCTIVITY STYLE

capture
everything



10

11



"Ok Google"

ADD
NOTE TO
PRESENTATION



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



My thesis is
Story (v)...



*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 Hold Focused Special Events for the Right Reason



BE HONEST

How many events does
your organization run?

how many?



hold no more than
2 fundraising
events per year

successful events
require 4 months of
staff focus

(3 prior & 1 after)

Worksheet for New Fundraising Ideas

Potential Revenue (1-low, 10-high)	Effort (1-very hard, 10-very easy)	Likely Success (1-low, 10-high)	Uniqueness (1-not unique, 10-very unique)	Mission Match (1-not at all, 10-very)	TOTAL POINTS

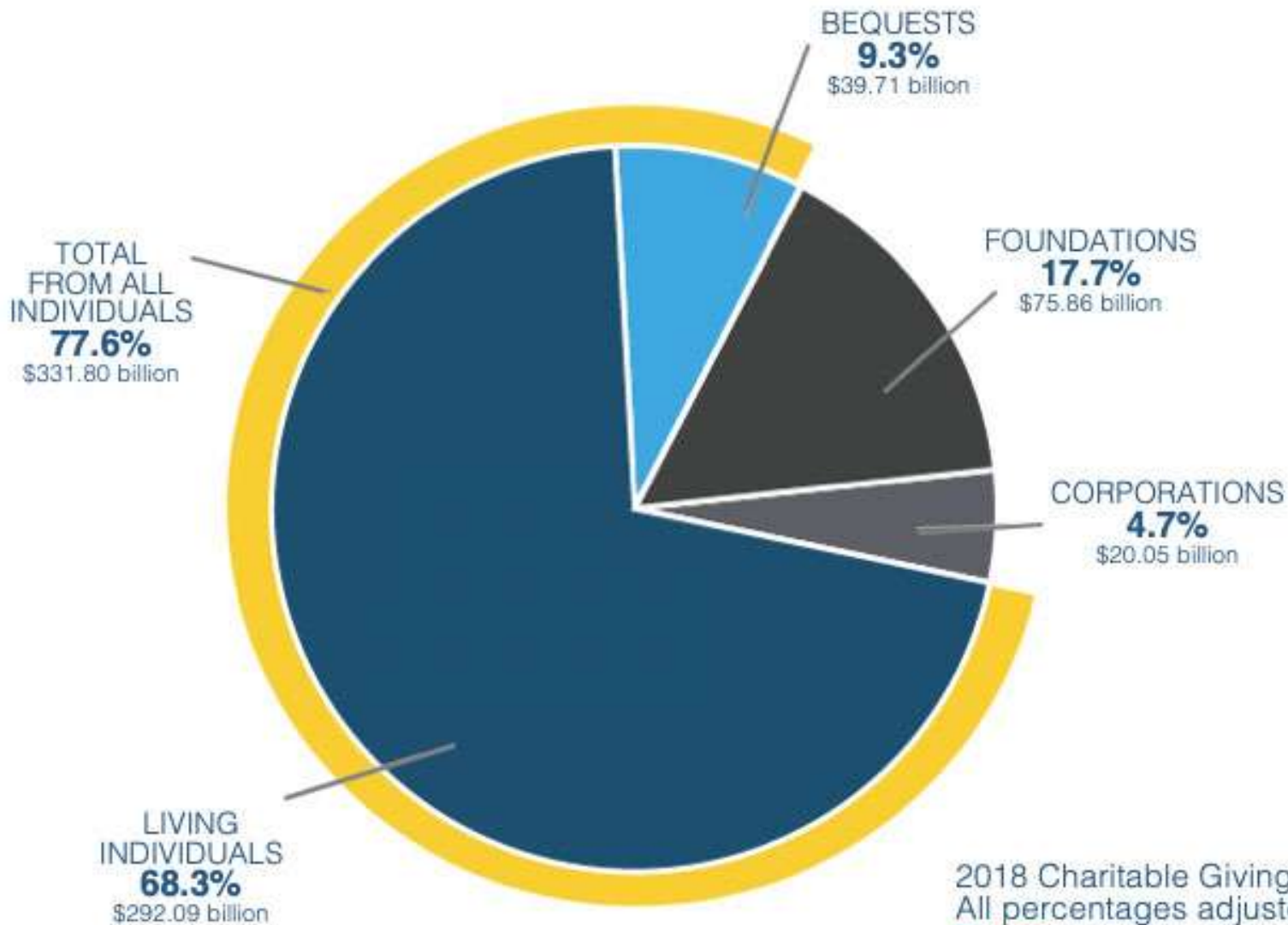
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What should be the
primary purpose of
a fundraising
event?



ACQUISITION

And what type of donor?



2018 Charitable Giving total: \$427.71 billion
All percentages adjusted for inflation
Source: Giving USA

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

#9 Proactively Manage Your Email



Compose

Inbox (179)

Drafts

Sent

Spam (85)

Trash

179 unread emails

The average
executive receives
116 emails per day!

source: Rory Vaden, 2019



schedule & triage



#10 Evaluate, But Don't Over Analyze, Results



569	94 330	81 042	59 8
6 203	7 142	30 724	96
17 240	65 940	41 066	39
41 646	83 065	37 386	39
46 422	41 600	20 220	
35 047	91 901	1 342	
69 163	8 870	44 872	
53 213	87 626	51 720	
15 193	10 939	19 544	
98 933	48 940	63 118	
95 403	37 995	70 93	
49 112	42 783	54 1	
76 731	7 210	80 F	
58 021	33 866	25	
83 612	53 014		
57 226	23 076		
39 344	63 593		
47 642	42 234		
44 279	90 208		
28 452	85 507		
43 797	18 403		
89 567	6 480		
34 828	20 88		
1 124	84 8		
93 124	81		
19 027	35		
62 934	3		
18 884			
47 368			
58 966	58 330		
20 609			

Revenue		Current Month		Year to Date	
	Amount	% of Sales	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		Year to Date	
	Amount	% of Sales	Amount	% of Sales	
Beginning inventory	540,000	1	45,000	0	
Plus goods purchased/manufactured	200,000	0	250,000	0	
Total goods available	38,000	0	295,000	0	
Less ending inventory	20,000	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		Year to Date	
	Amount	% of Sales	Amount	% of Sales	
Selling					
Salaries and wages	122,000	0	65,000	0	
Commissions	112,000	0	32,000	0	
Advertising	335,000	0	22,000	0	
Depreciation	10,000	0	37,000	0	
Total selling expenses	579,000	1			
General/Administrative					
Salaries and wages	20,000				
Employee benefits	33,000				
Payroll taxes	70,000				
Insurance					
Rent					
Utilities					
Depreciation					



Category	Actual	Budget	Variance	Actual	Budget	Variance	Actual	Budget	Variance	Actual	Budget	Variance	Actual	Budget	Variance	Actual	Budget	Variance	Actual	Budget	Variance
PROFIT AND LOSS																					
Revenue	85,000	75,000	10,000	85,000	75,000	10,000	85,000	75,000	10,000	85,000	75,000	10,000	85,000	75,000	10,000	85,000	75,000	10,000	85,000	75,000	10,000
Cost of Goods Sold																					
Cost of Goods Sold	40,000	35,000	5,000	40,000	35,000	5,000	40,000	35,000	5,000	40,000	35,000	5,000	40,000	35,000	5,000	40,000	35,000	5,000	40,000	35,000	5,000
Operating Expenses																					
Operating Expenses	150,000	140,000	10,000	150,000	140,000	10,000	150,000	140,000	10,000	150,000	140,000	10,000	150,000	140,000	10,000	150,000	140,000	10,000	150,000	140,000	10,000
Net Profit																					
Net Profit	35,000	40,000	(5,000)	35,000	40,000	(5,000)	35,000	40,000	(5,000)	35,000	40,000	(5,000)	35,000	40,000	(5,000)	35,000	40,000	(5,000)	35,000	40,000	(5,000)



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



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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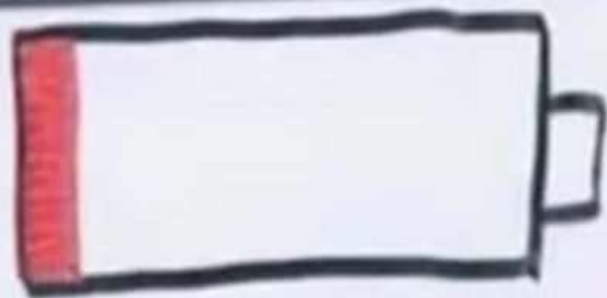
#11 Seek Work Life Harmony, Not Balance





SOME DAYS
YOU EAT SALADS
AND GO TO THE GYM,
SOME DAYS
YOU EAT CUPCAKES
AND REFUSE TO PUT
ON PANTS.

its called
balance.



You wouldn't let this happen to
your phone.

Don't let it happen to you either.

Self care is a priority.
Not a luxury.

work self

home self

just be your self

ZOMBIE APOCALYPSE

WHAT WE THINK IT LOOKS LIKE:



WHAT IT REALLY LOOKS LIKE:



A photograph of a hiker standing on a dirt path in a forest. The hiker is wearing a light blue long-sleeved shirt, olive green pants, a black backpack, and an orange hat. He is holding a black trekking pole. The background is a dense forest with many trees and green foliage. The image is framed by dark blue vertical bars on the left and right sides, which contain a blue and white patterned fabric. Overlaid on the center of the image is white text.

analog hobby, with
no inputs, practiced
weekly =
synthesizing time

#12 Love Your Donors & Steward Them Appropriately







THASKING



call script

Hi (donor's name).

I'm _____ (your name) from _____ (charity).

I'm calling today to thank you for your recent donation. It means so much and we wanted to tell you personally how grateful we are.

[pause]

If you have just a few seconds, I'd love to know what prompted your gift?

[pause]

productivefundraising.com/tune-up

Thank you _____ we a
wonderful day!



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

sentence 3 = what you appreciate about the
person's role in what you saw

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

5 before 10

(Wendy Taylor)

 **CULTURAL ENRICHMENT FUND**
PO Box 1204 - Washington, DC 20004

Joe D...
105 Main St
Annapolis, PA 18415



Dear ...



30



The End!

@fundraiserchad





fundraising training & coaching

further learning

@fundraiserchad





10/28 @ 1pm (eastern)

questions

productivefundraising.com/resources

