

Achieving the Fundraising Success Trifecta

Effective, Efficient & Enjoyable

PRESENTED BY CHAD BARGER, CFRE



The Fundraising Success Trifecta



EFFECTIVE FUNDRAISING



EFFICIENT FUNDRAISING



ENJOYABLE FUNDRAISING

fundraising events



EFFECTIVE FUNDRAISING

The primary purpose of a fundraising event should be to attract NEW INDIVIDUAL donors to support your cause. Hold unique events that relate to your mission.

Focus on raising the bulk of the revenue for an event through sponsorships (not ticket sales). This means starting early!



EFFICIENT FUNDRAISING

Hold no more than two major fundraising events per year, so you can focus on other fundraising channels with higher returns on investment.



ENJOYABLE FUNDRAISING

Not being constantly burnt out from event fatigue & having the opportunity to build rewarding relationships with your donors.

monthly giving



EFFECTIVE FUNDRAISING

Work to convert the lower 90% of your donor base to monthly giving. They give more and are more loyal.

Enable monthly giving & make monthly giving your default ask.

Send personal (snail mail) requests to invite donors to give monthly and follow up on them.



EFFICIENT FUNDRAISING

Utilize volunteers to send your monthly donor conversion requests.



ENJOYABLE FUNDRAISING

Enable email notifications for new monthly gifts!

And the CFO/Treasurer/Bookkeeper will finally like you.

development committee meetings (or any meetings)



EFFECTIVE FUNDRAISING

No reports at meetings (send them ahead of time).

Use the time for brainstorming, discussion & strategy.



EFFICIENT FUNDRAISING

Use Zoom (or your platform of choice).
Make your meeting 45 minutes long (or 75), but not 60 (or 90).



ENJOYABLE FUNDRAISING

2 words: cameras optional

personalized correspondence



EFFECTIVE FUNDRAISING

Donors do not respond well to mass produced “form letter” style correspondence.

Donors respond much better to personalized correspondence.



EFFICIENT FUNDRAISING

Add quick, hand written messages to correspondence (especially appeals).

“Thanks for your loyal support.”

“We can't do it without you!”

“I appreciate your consideration.”

If you're in rush, use pre-written post-it note messages (written by volunteers).



ENJOYABLE FUNDRAISING

Buy a pen that you love.

Buy stationary that you love.

Only use them for donor correspondence.

annual reports



EFFECTIVE FUNDRAISING

Donors do not want to read a long annual report filled with statistics and pie charts. Most donors don't care about recognition and many would prefer that their name not be listed publicly.



EFFICIENT FUNDRAISING

Send an annual report postcard.
Direct donors to your website for more detailed information (e.g. full program statistics, 990).
Invest the time and cost saved into building stronger relationships with donors.



ENJOYABLE FUNDRAISING

This just saved you at least 40 hours per year.
Now you have time to use your vacation time. Even if it's a stay-cation ... use it.

storytelling



EFFECTIVE FUNDRAISING

- Tell a compelling story about ONE person.
- Provide rich detail and bring up a problem that the donor's support will solve.



EFFICIENT FUNDRAISING

- Gather stories in advance, so you always have one when you need them.
- Be proactive (versus reactive).
- Befriend the program staff (with donuts) and ask donors for their story (on the back of your donation response card).



ENJOYABLE FUNDRAISING

- Stay connected with the passion you have for your organization's mission through regular exposure to new stories.
- Work that you are passionate about doesn't (always) feel like work.
- And donors can tell.

hand written thank you notes



EFFECTIVE FUNDRAISING

Promptly send them after a donor (or volunteer) gives generously of their time, talent or treasure.



EFFICIENT FUNDRAISING

Write three minute, three sentence thank you notes: what happened, the impact of that on the organization & what you appreciate about them.

Keep them with you at ALL times (pre-stamped and ready to go)!



ENJOYABLE FUNDRAISING

The chance to slow down and write something by hand.

The surprised reaction of donors (who will sometimes even call to thank you for sending a hand written note).

The Fundraising Success Trifecta



EFFECTIVE FUNDRAISING

What's the best practice in this fundraising area? (always be learning)



EFFICIENT FUNDRAISING

What can I do to make this process more efficient?



ENJOYABLE FUNDRAISING

How can I make this fun (or make it so I dread doing it less)?



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overcome the barriers to success