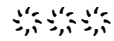


Effective Fundraising During a Pandemic · March 29 & 30, 2021
Presented by Sarah K. Nathan, PhD
Murray State University's Community Innovation Summit



HOLDING SPACE

Loved one, friend, colleague, and/or community member on my heart and mind today:

WARM UP

of gifts at my organization in 2020:

of donors at my organization in 2020:

of new donors at my organization in 2020:

Fundraising goal for 2020:

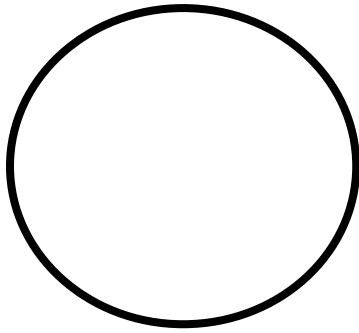
PEER GROUP MEETING #1

Facilitator:

Members' names & organizations:

1 success from the last 12 months:

1 challenge my organization is facing in the coming 12 months:

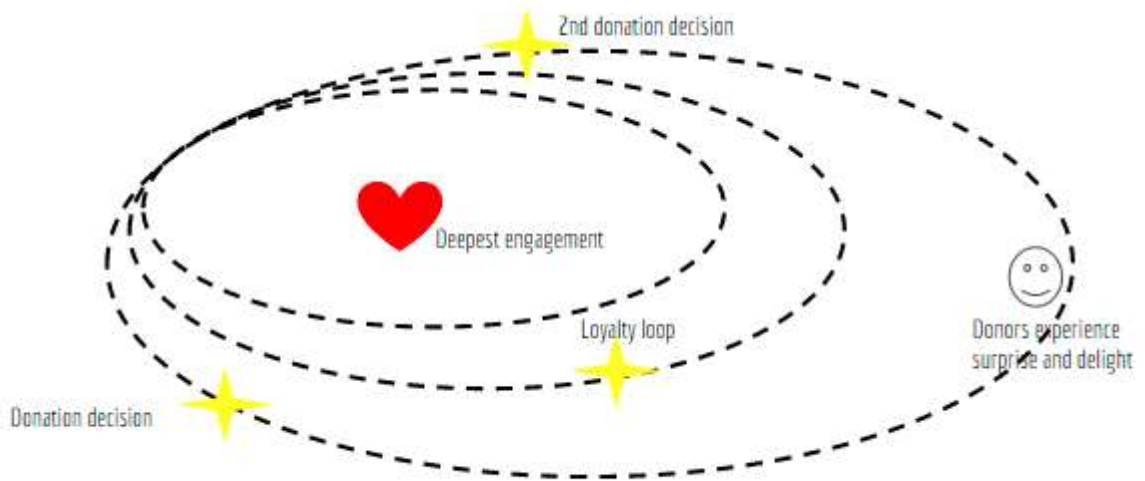


of repeat donors in 2020



of all donors in 2019

The donor's journey:



Adapted from McKinsey's Consumer Decision Journey, 2009

PEER GROUP MEETING #2: RETENTION STRATEGIES

Timely THANK YOU / acknowledgement

Impact stories

Report outcomes

Meaningful engagement

Segmented communications

Offer recurring giving options

DIGITAL CHANNELS: NOTES / IDEAS / DATA POINTS

PEER MEETING #3: NEXT STEPS & PLANNING

1 thing I can do right now:

2 middle term projects (2-3 months):

3 longer term projects (3-6 months):

Group members I'd like to stay in contact with:

The plan is a living document. While conditions and activities may change throughout the year, a plan serves as an accountability measure for everyone on the team. Don't file it away or stuff it in a binder. Keep it in a central and visible location. Revisit it at each team meeting. Determine were adjustments need to be made along the way. Don't forget to celebrate successes!

Analyze past performance: you can't determine success if you don't know where you've been

How did you do last year?

Dollars raised

of donors

of new donors

Retention rate

Cost to raise a dollar

Where did you succeed? Why?

Where did you stumble? Why?

What does this tell you about what the year's work should entail?

Set big goals for the year: beyond \$\$ raised

of new donors

of donor visits

monthly giving program

retention rate

board involvement

strengthening fundraising infrastructure (database, payment processing, etc)

What else?

Outline the year – who will do what and when?
 Map goals to a calendar by weeks, months, or quarters

Example:

Goal	Point person	Q1 tasks	Q2 tasks	Q3 tasks	Q4 tasks
<i>Create legacy giving marketing campaign with at least 3 collateral pieces (print & digital)</i>	<i>Executive director with assistance from marketing committee</i>	<i>Committee kick off meeting</i>	<i>Draft materials, share with development committee</i>	<i>Finalize and print materials; Build legacy giving web page</i>	<i>Conduct at least 5 donors visits</i>

Adapted from Heather Yando, Benchmarking Individual Donors, Sanford Social Innovation Review, October 2016