

### **Get Off the Fundraising Treadmill:** Shake Up Your Regular Routine to Raise More for Your Cause



### Land Acknowledgement



# Hello

### l'm Julia,

#### Communications Manager at DonorPerfect.





# What is the fundraising treadmill?





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Golf Fundraiser

- Reorganization of
  Fellowship Groups
- Reorder of Printed Communications

🛅 Year End Campaign

		Ja	nua	ry					Fe	brua	ary					٨	Aarc	h					3	Apri	il		
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15	16	17	18	19	20	21	12	13	14	15	16	17	18	10	11	12	13	14	15	16	14	15	16	17	18	19	20
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#### Why did we do this?

- It has worked each year.
- With a plan, I could focus my energy on execution instead of ideation.
- The other staff members knew what to expect and what was expected of them.

#### We were on the treadmill



#### Why did we do this?

- It has worked each year.
- With a plan, I could focus my energy on execution instead of ideation.
- The other staff members knew what to expect and what was expected of them.

#### How could this be detrimental?

- Everyone would get bored.
- Problems were not being solved.
- It just isn't working.



- Diversify
- Other workout equipment may be more beneficial
- Evaluation





## Orange County School of the Arts

#### The Inputs

- Tuition free donation dependent charter school
- 33 Individual Programs to Support

#### The Issues

Resource intensive, rinse and repeat pledge
 process for parents





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#### **The Solutions**

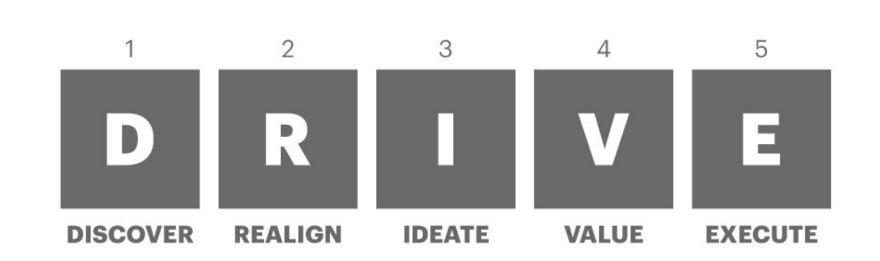
- CRM + QGiv electronic forms for pledges
- Crowdfunding Pages



# Are you on the fundraising treadmill?

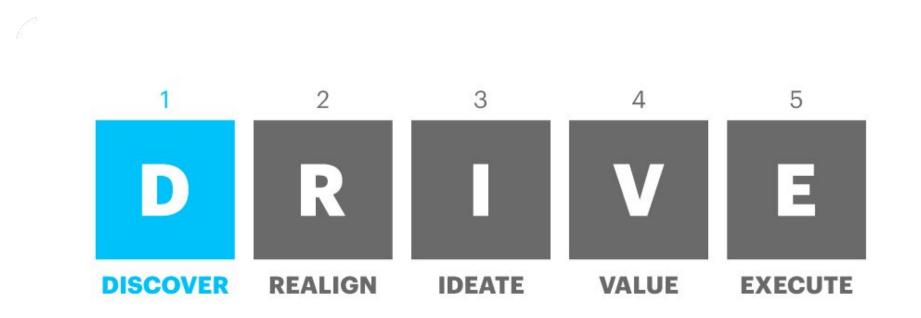
#### Pull the Plug on the Treadmill





#### Pull the Plug on the Treadmill















Talked to the kids living through the experience.

You can do that too.

Talk to the people living through the experience of your treadmill.

- Other staff
- Donors



	Stop	Start	Continue
Sheri			
Jamar			
Robert			



	Stop	Start	Continue
Sheri		Kickoff meetings	
Jamar			
Robert			



	Stop	Start	Continue
Sheri		Kickoff meetings	
Jamar			
Robert	Selling tickets anywhere other than our form		



	Stop	Start	Continue
Sheri		Kickoff meetings	
Jamar			Using beneficiary stories during the event
Robert	Selling tickets anywhere other than our form		

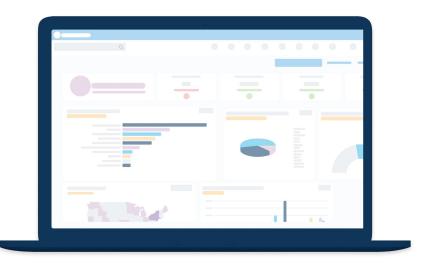


Declining numbers

- Attendance
- Giving
- Retention

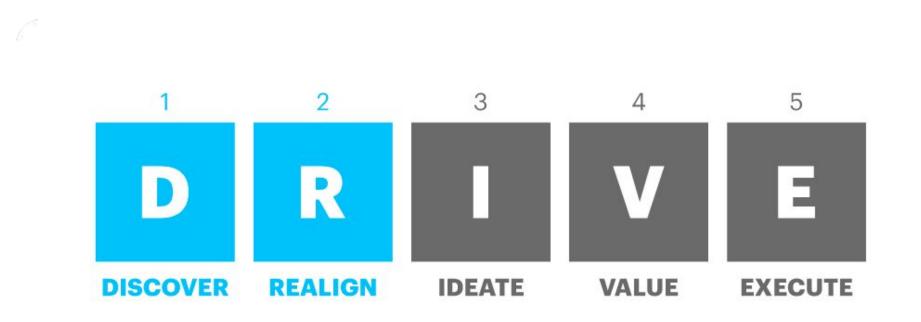
Donor testimony

- SYBUNTs
- Former board members



#### Pull the Plug on the Treadmill







1. Remove Bias

24



1. Remove Bias

We do a golf event every year.

Why?

Because it raises money and is a great way to engage specific donors.

Why?

Because it is the only thing those donors want to come out for.

Why?

Because they are not really interested in anything else we are doing

Yikes.



## Are your donors on their own fundraising treadmill?

4 Strategies to build multichannel donor relationships



SCAN TO DOWNLOAD



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#### 2. Provide proof



**Remove Bias** 1

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#### 2. Provide proof

#### Reports

#### Comparisons

Other organizations 

#### DonorPerfect Insights

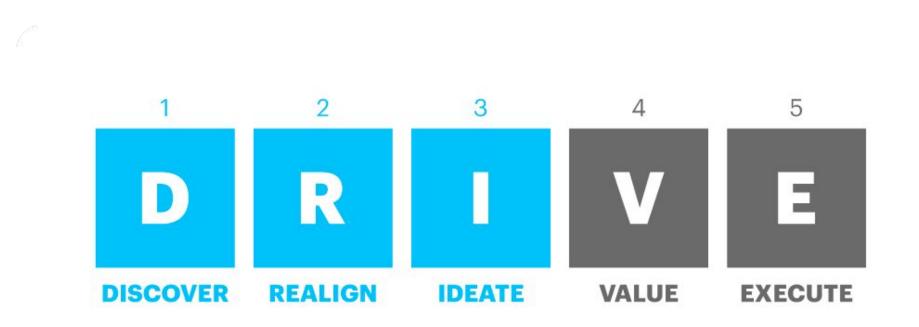
Pr

individual Screened	Ray Moore
Wealth Rating	87
Predicted Education Level	Bachelor
edicted Presence of Children in Household	78
Predicted Level of Technology Adoption	Journeyman
Predicted Responsiveness to Email	87
Likelihood of Veteran in Household	5
Predicted Affinity for Children's Causes	78
Predicted Affinity for investing	23
Predicted Affinity for Business Ownership	87
Predicted Affinity for Health Causes	34
Predicted Affinity for Wildlife Preservation/Conservation	54
Predicted Affinity for International Causes	43
redicted Affinity for Agriculture	10

	07/01/2021	Screening Date
	\$35,000.00	Predicted Giving Capacity Over 5 Years
	Gen Y	Predicted Generation
	European	Predicted Ethnic Background
	65	Predicted Responsiveness to Direct Mall
	15	Predicted Responsiveness to Social
	23	Predicted Veteran Status Likel hood
	32	Predicted Affinity for Education Causes
	25	Predicted Affinity for Catholic Causes
	12	Predicted Affinity for Religious Causes
	67	Predicted Affinity for Animal Welfare Causes
	45	Predicted Affinity for Science
	87	Predicted Affinity for Local Community Causes
	Snanish	Dearlisted Secondary Language

#### Pull the Plug on the Treadmill

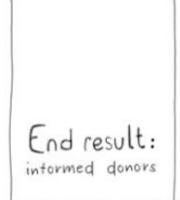




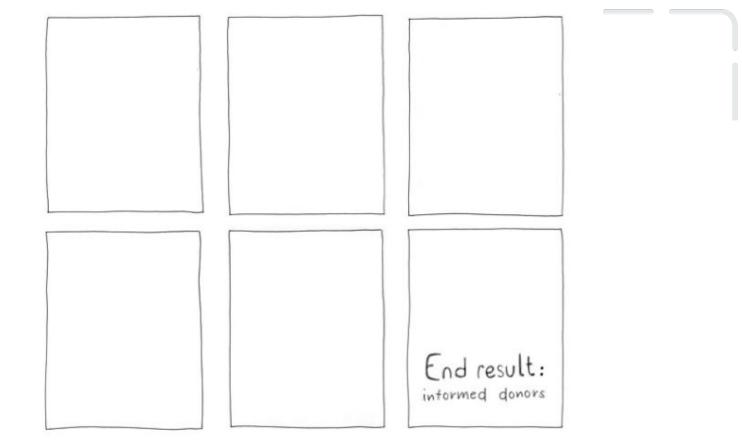




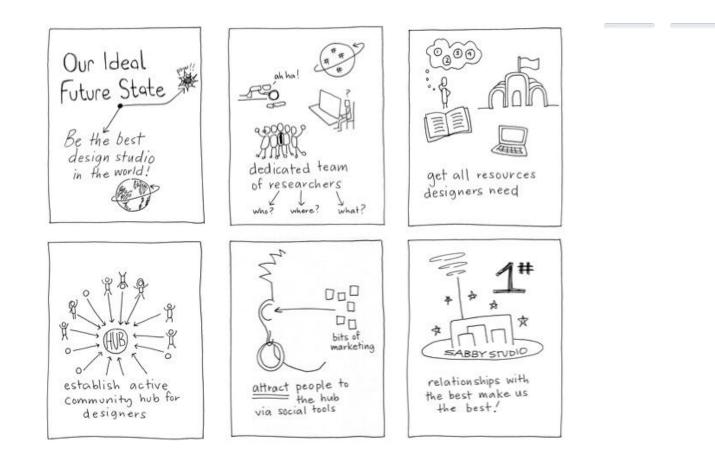














- Development team
- Program team
- Executive team
- Event attendees

#### **Get Creative: Think as someone else**



- Development team
- Program team
- Executive team
- Event attendees

The development teams goal for the Golf Event is to:

#### **Get Creative: Think as someone else**



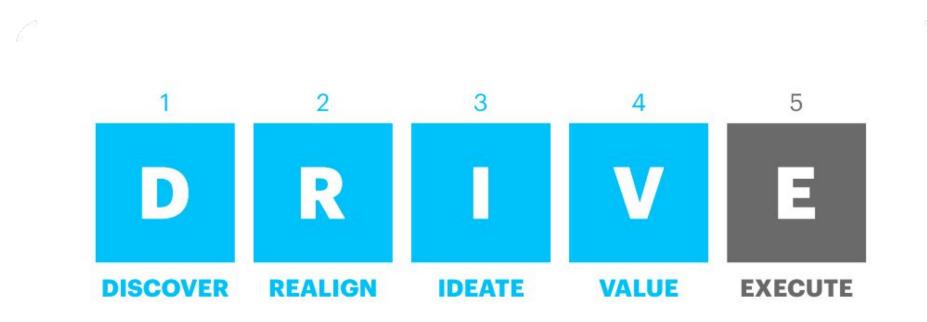
- Development team thinks as the program team
- Program team thinks as the executive team
- Executive team thinks as the event attendee
- Event attendees thinks as the development team

The development teams goal for the Golf Event is to:

#### We will accomplish this by:

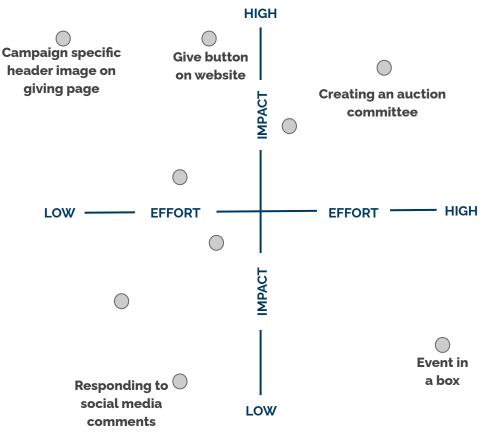
#### **Pull the Plug on the Treadmill**







### Prioritize





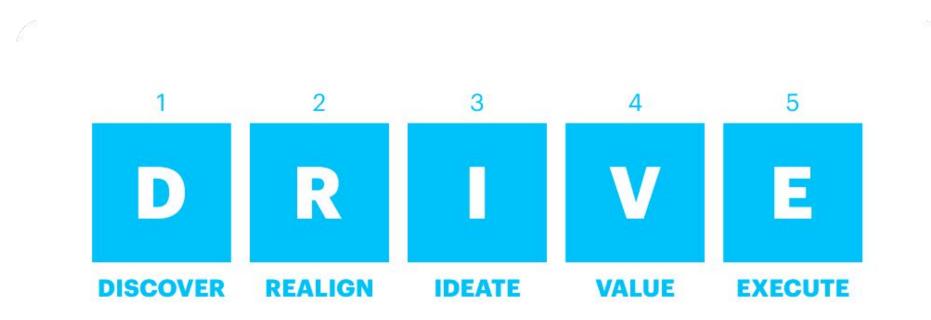
	CRITERIA 1	CRITERIA 2	CRITERIA 3	
CRITERIA DESCRIPTION	COSTS (TIME & FUNDING)	DONOR REACH	RETURN ON INVESTMENT	
	CRITERIA 1	CRITERIA 2	CRITERIA 3	WEIGHTED SCORE
WEIGHT (1-5)	2	4	4	10
	20%	40%	40%	100%
OPTIONS	CRITERIA 1 SCORES	CRITERIA 2 SCORES	CRITERIA 3 SCORES	
GALA EVENT	5	2	4	3
FUN RUN	2	1	2	2



	CRITERIA 1	CRITERIA 2	CRITERIA 3	
CRITERIA DESCRIPTION	COSTS (TIME & FUNDING)	DONOR REACH	RETURN ON INVESTMENT	
	CRITERIA 1	CRITERIA 2	CRITERIA 3	WEIGHTED SCORE
WEIGHT (1-5)	2	4	4	10
	20%	40%	40%	100%
OPTIONS	CRITERIA 1 SCORES	CRITERIA 2 SCORES	CRITERIA 3 SCORES	
DATA PRJOECT	4	5	4	4
BOARD HOME EVENT	1	4	3	3
FOCUS ON MONTHLY GIVING	2	3	5	4

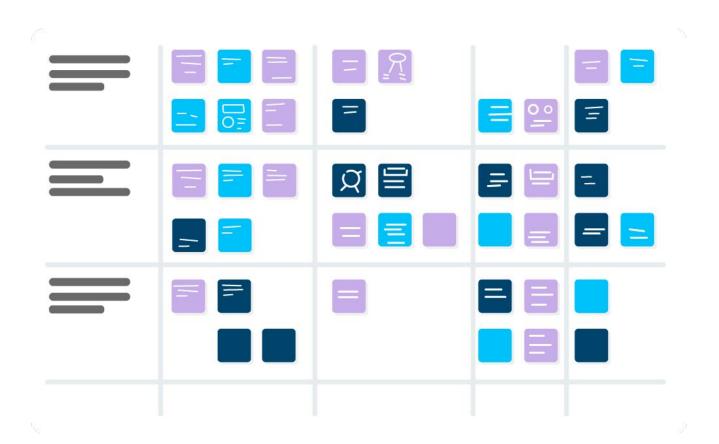
#### **Pull the Plug on the Treadmill**





**42** 





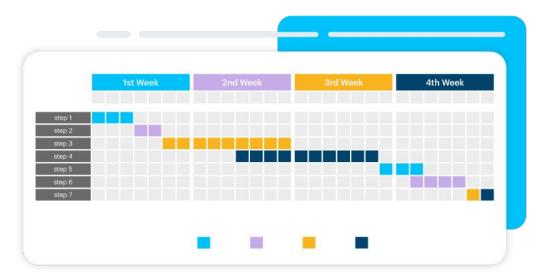


Clear Vision of Success

Achievable Measures of Success

Habits of a high functioning team

- Kick off meeting
- Strategy brief
- Project plan & timeline
- Clear milestones & deliverables





- Sprint: Period of time to accomplish work (2 weeks)
- Sprint Planning: What will you get done in the sprint
- Scrum: Daily check-in to stay aligned on progress
- Sprint Demo: Review what has been completed this sprint
- Retrospective: Reflect on what worked and what can be improved
- Backlog: Ideas being scoped for a future sprint

If you take away only one thing, it should be this.



## Are you on the fundraising treadmill?



#### Do this now.

Go back to your organization and take a critical look at the treadmill you're on, and your supporters are on.

Challenge your assumptions. Open yourself up to the unknown. Take your first step off the treadmill by seeing it for what it is.



# Thanks!

## Any questions?

You can find me on LinkedIn or email me at JuliaGackenbach@donorperfect.com

