



# Fundraising Fitness

## How to Stay Strong in Challenging Times

## Activity:

# Playdough Icebreaker – “Shape Your Strength”

### Instructions

- Take a small piece of playdough.
- Sculpt one object that represents your organization’s greatest fundraising strength — or the strength *you* bring to fundraising.
- You have 3 minutes!

### Then:

- Pair up and share what you created and why.
- Reflect together:
  - What strengths did you hear?
  - What strengths do we often forget to celebrate?
  - How can these strengths help us raise more in challenging times?

### Purpose:

Unlock creativity • Build connection • Focus on assets, not deficits

# Large Group Share Out



You don't have everything you need to raise more money, but you have something. Today is about unlocking it, strengthening your routines, & doubling down on what grows revenue in your reality, not someone else's.



# Need Free Fundraising Resources? Join Our Email List!



# Learning Objectives

**By the end of this session, participants will strengthen their fundraising muscle by learning how to:**

1. Implement a development rhythm
2. Focus on high-return activities that grow donor loyalty and revenue
3. Create a 90-day fundraising action plan using resources they already have

# 2024 Charitable Giving by Source

Source	Up/down	Amount	Adjusted for Inflation
Total	↑ 6.3%	\$592.50 billion	↑ 3.3%
Individuals	↑ 8.2%	\$392.45 billion	↑ 5.1%
Foundations	↑ 2.4%	\$109.81 billion	= -0.5%*
Bequests	↓ 1.6%	\$45.84 billion	↓ 4.4%
Corporations	↑ 9.1%	\$44.40 billion	↑ 6.0%

Source: Giving USA, The Annual Report on Philanthropy 2024

# 2024 Charitable Giving to Recipients

Type of recipient organization	Up/down	Amount	Adjusted for Inflation
Religion	↑ 1.9%	\$146.54 billion	↓ 1.0%
Human Services	↑ 5.0%	\$91.15 billion	↑ 2.0%
Education	↑ 13.2%	\$88.32 billion	↑ 9.9%
To Foundations	↑ 3.5%	\$71.92 billion	=+0.5%*
Public-Society Benefit	↑ 19.5%	\$66.84 billion	↑ 16.1%
Health	↑ 5.0%	\$60.51 billion	↑ 2.0%
International affairs	↑ 17.7%	\$35.54 billion	↑ 14.3%
Arts, culture, and humanities	↑ 9.5%	\$25.13 billion	↑ 6.4%
Environment and animals	↑ 7.7%	\$21.57 billion	↑ 4.6%

Source: Giving USA, The Annual Report on Philanthropy 2024

Every organization has a moment  
where they decide to stop  
surviving and start thriving. This  
can be that moment for you.

# Development Operations High Return Activities 90 Day Action Plan

# Development Operations

## High Return Activities

### 90 Day Action Plan

# What is a *development rhythm*?

It's the nonprofit version of a workout routine:  
Not random, not reactive, not “when we have  
time”... but **structured, repeatable, and  
designed to build strength over time.**

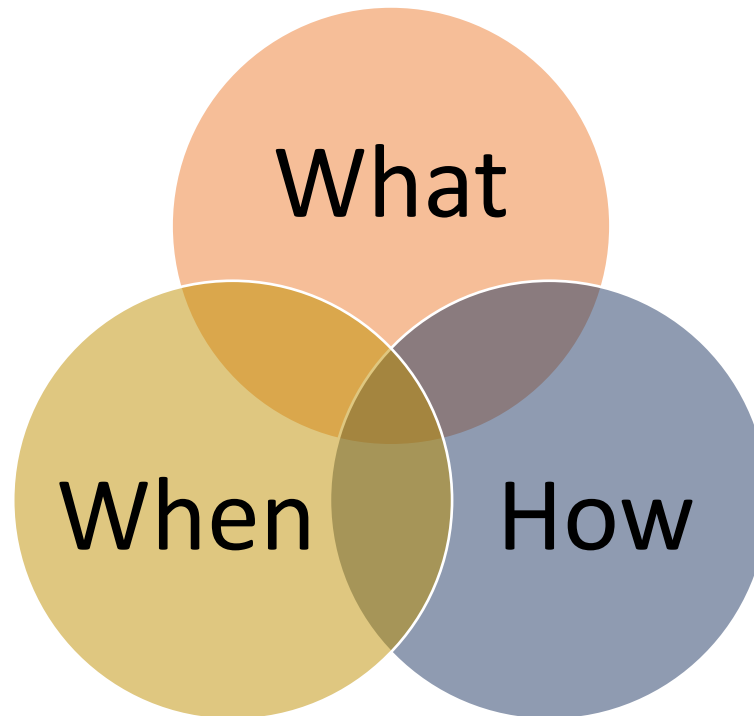
# What is a *development rhythm*?

The cadence of intentional actions that create operational excellence for your development team.

**A sample list of things you can develop a rhythm for:**

- Your plan for stewardship
- Your monthly revenue priorities
- Your weekly storytelling cadence
- Your system for staying visible to donors
- Your leadership visibility plan (especially CEO)

# Development Operations Rhythm



# Key Questions

- ☐ What are the basic functions we need to execute?
- ☐ When do we execute them (daily, weekly, monthly quarterly and annual basis?)
- ☐ How do we execute them?

**Don't focus on the “who” (yet)**

# Development Operations Rhythm

Customized

Consistent

Effective

# Make it **Customized**

**Because every organization has a different reality.**

- ❑ A development rhythm that works for a \$5M organization with a full team will *never* fit a \$500K shop with one part-time fundraiser.

## **Customization ensures:**

- Your rhythm matches your capacity
- You're not copying unrealistic models
- Your team can implement it without burnout
- You stay aligned with your mission and pace

Customized

Consistent

Effective

A customized rhythm respects the truth: **you can't scale a system that doesn't fit.**

# Make it **Consistent**

**Because donors can only trust your track record.**

- ❑ Trust is built through predictable, reliable communication.  
Random communication = Random giving

**Consistency creates:**

- Donor confidence
- Higher engagement
- More predictable revenue
- A reputation of professionalism

Customized

Consistent

Effective

In challenging times, consistency isn't just a "nice to have", **it's the difference between donor loyalty and donor loss.**

# Make it **Effective**

**Because evaluation is too important to be left to “when we have time.”**

- ❑ Development rhythms must lead to outcomes, not just busywork.

**Effective rhythms prioritize:**

- High-ROI actions
- Donor-facing visibility
- Data that guides decisions
- Activities that move revenue
- Stewardship that strengthens relationships

Customized

Consistent

Effective

When **rhythms are effective**, the work feels lighter, the team feels clearer, and **donors feel more connected**.

# Activity:

## Development Rhythm Discussion

### Instructions

**Work with a partner. Discuss each question below about your own organization. Write each of your responses on a separate post it.**

1. What development function do we need to create a rhythm for?
2. What barriers stand in the way of creating this rhythm?
3. What are 2-3 potential solutions to overcome those barriers?

### Then

**Help your partner with a solution they may not have thought of.**

### Purpose

**Identify obstacles | Ask the right questions | Focus on solutions**



**Large Group Share  
Out**



# Development Operations High Return Activities 90 Day Action Plan

# Stewardship

		Action Item	Target Audience Segment	Timeline
PHASE ONE ONBOARD	1	Donation Processed	New & Renewed Donors	0 days-immediate
	2	Auto Receipt is emailed	New & Renewed Donors	0 days-immediate
	3	Thank you letter mailed from VP of Philanthropy	New & Renewed Donors	7 days
	4	Add member emails to Mailchimp	New & Renewed Donors	7 days
PHASE TWO STEWARD	5	Thank You call \$1,000+	New & Renewed Donors	14 days
	6	Invitation to CEO Coffee Hour	All Donors-Segment for each	monthly
	7	Thank you letter mailed from Board Chair and/or Board Member	\$25,000+ All donor sectors	quarterly
	8	Onsite Classroom visit	\$25,000+ Donors	semi-annually
	9	Philanthropy Impact Newsletter	All Donors+Prioritize BIPOC	quarterly
	10	Semi-Annual CEO Appreciation blast	All donor sectors	semi-annually
	11	Handwritten personal note	\$2,500+ Individual Donors	month 10
PHASE THREE SOLICIT	12	Auto renewal reminder email	Expiring Individual Donors	month 11
	13	Mailed reminder letter	Expiring Individual Donors	month 11
	14	Personal renewal reminder email blast	Expiring Individual Donors	month 12
	15	Renewal reminder phone call	Expiring Individual Donors	month 12
	16	Donation Renewed & Cycle Resumes	All donor sectors	month 12

# Sample: **Daily** High Return Activities Development

- ✓ Call 10 donors during the first hour of the day
- ✓ Like/comment on 3–5 LinkedIn posts from donors/partners/stakeholders
- ✓ Share 1 quick program win internally (photo, quote, metric)
- ✓ Review CRM tasks or follow-ups for the day
- ✓ Send 1 stewardship touch (text, thank-you email, comment, voice memo)

# Sample: **Weekly** High Return Activities

## **Monday & Tuesday**

- Call and thank 10 donors-Call and ask 10 donors 9am-10am
- Review donor pipeline + set 3 priorities for the week
- Assign stewardship tasks to team/CEO/board
- Draft and schedule 1–2 social posts (story, update, shoutout)

## **Wednesday & Thursday**

- Call and thank 10 donors-Call and ask 10 donors
- Update CRM with notes
- CEO LinkedIn post or short video
- Set up coffee/lunch with 10 donors for next month

## **Friday**

- Call and thank 10 donors-Call and ask 10 donors
- Weekly donor digest: “Top wins this week”
- Prep content, events, or stewardship for next week



# Sample: **Monthly** High Return Activities Development

- ✓ Send one donor update email or newsletter
- ✓ Hold 1 virtual or in-person donor conversation
- ✓ Review giving trends + donor segmentation
- ✓ Update monthly giving stats + highlight a recurring donor
- ✓ Refresh donation page if needed
- ✓ Board stewardship assignment (5–7 names per board member)
- ✓ Upload 3–5 new stories or photos to your content library
- ✓ Review revenue progress vs. monthly goal
- ✓ CEO sends 1 personalized video or short “state of the mission” update



# Sample: **Quarterly** High Return Activities Development

- ✓ Review and update Case for Support
- ✓ Set next-quarter priorities based on data
- ✓ Conduct board engagement tune-up
- ✓ Identify 10 new prospects (corporate, foundation, or major donors)
- ✓ Celebrate wins + share impact outcomes

# High Return Data Operations

## Daily

- ✓ Enter donations
- ✓ Update contact information
- ✓ Record interactions
- ✓ Process acknowledgment letters
- ✓ Import online donations
- ✓ Track event attendance
- ✓ Manage recurring gifts
- ✓ Run data backup
- ✓ Review tasks and

## Weekly

- ✓ Check for duplicates
- ✓ Verify data accuracy
- ✓ Update mailing lists
- ✓ Generate reports
- ✓ Review outstanding pledges
- ✓ Clean up data errors

## Monthly

- ✓ Reconcile donations with accounting
- ✓ Review lapsed donors
- ✓ Analyze giving trends
- ✓ Remove inactive contacts
- ✓ Evaluate campaigns
- ✓ Conduct user training

## Quarterly

- ✓ Audit data integrity
- ✓ Update database policies
- ✓ Review data security
- ✓ Assess database needs
- ✓ Review pledge forms and uploads
- ✓ Enter grant contracts



# QUESTIONS?



# Development Operations High Return Activities 90 Day Action Plan

# 90-Day Plan: Anonymous Pre-Assessment (2 min)



# 90-Day Plan: Anonymous Pre Assessment

SECTION 1 — Leadership & Visibility: Please rate the following statements. \*

0 — No      1 — I don't know      2 — Sometimes      3 — Yes

Our CEO or  
Executive  
Director  
communicates  
visibly at least  
weekly.

☐☐☐☐

Our funding  
priorities are  
clear across  
staff, board, and  
donors.

☐☐☐☐

Our board helps  
with donor  
relationships  
(introductions,  
stewardship,  
amplification).

☐☐☐☐

# 90-Day Plan: Anonymous Pre Assessment

SECTION 2 — Stewardship & Donor Care: Please rate the following statements. \*

0 — No

1 — I don't know

2 — Sometimes

3 — Yes

Donors receive  
consistent, year-  
round  
stewardship.

☐☐☐☐

We have a  
documented  
monthly  
stewardship  
plan.

☐☐☐☐

Program staff  
regularly share  
impact stories  
with  
development.

☐☐☐☐

# 90-Day Plan: Anonymous Pre Assessment

SECTION 3 — Systems & Infrastructure: Please rate the following statements. \*

0 — No

1 — I don't know

2 — Sometimes

3 — Yes

Our CRM is  
accurate and  
actively  
maintained.

☐☐☐☐

We use data to  
guide decisions  
and fundraising  
priorities.

☐☐☐☐

We analyze  
donor trends on  
a regular basis.

☐☐☐☐

# 90-Day Plan: Anonymous Pre Assessment

SECTION 4 – Digital Strategy: Please rate the following statements. \*

0 – No

1 – I don't know

2 – Sometimes

3 – Yes

We post  
meaningful  
digital content  
weekly.

☐☐☐☐

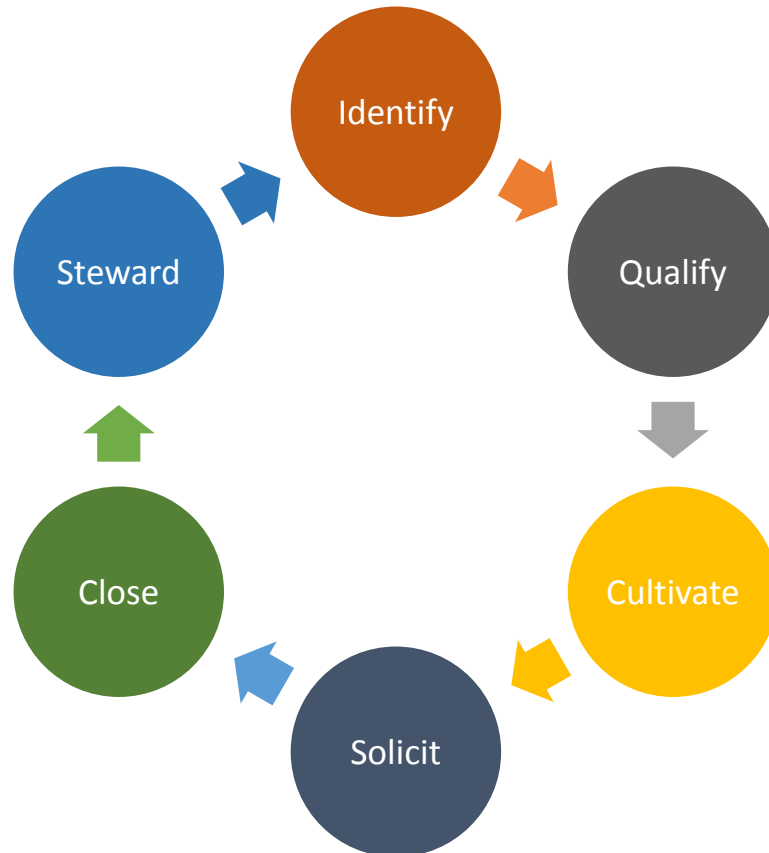
Our donation  
pages are  
mobile-friendly.

☐☐☐☐

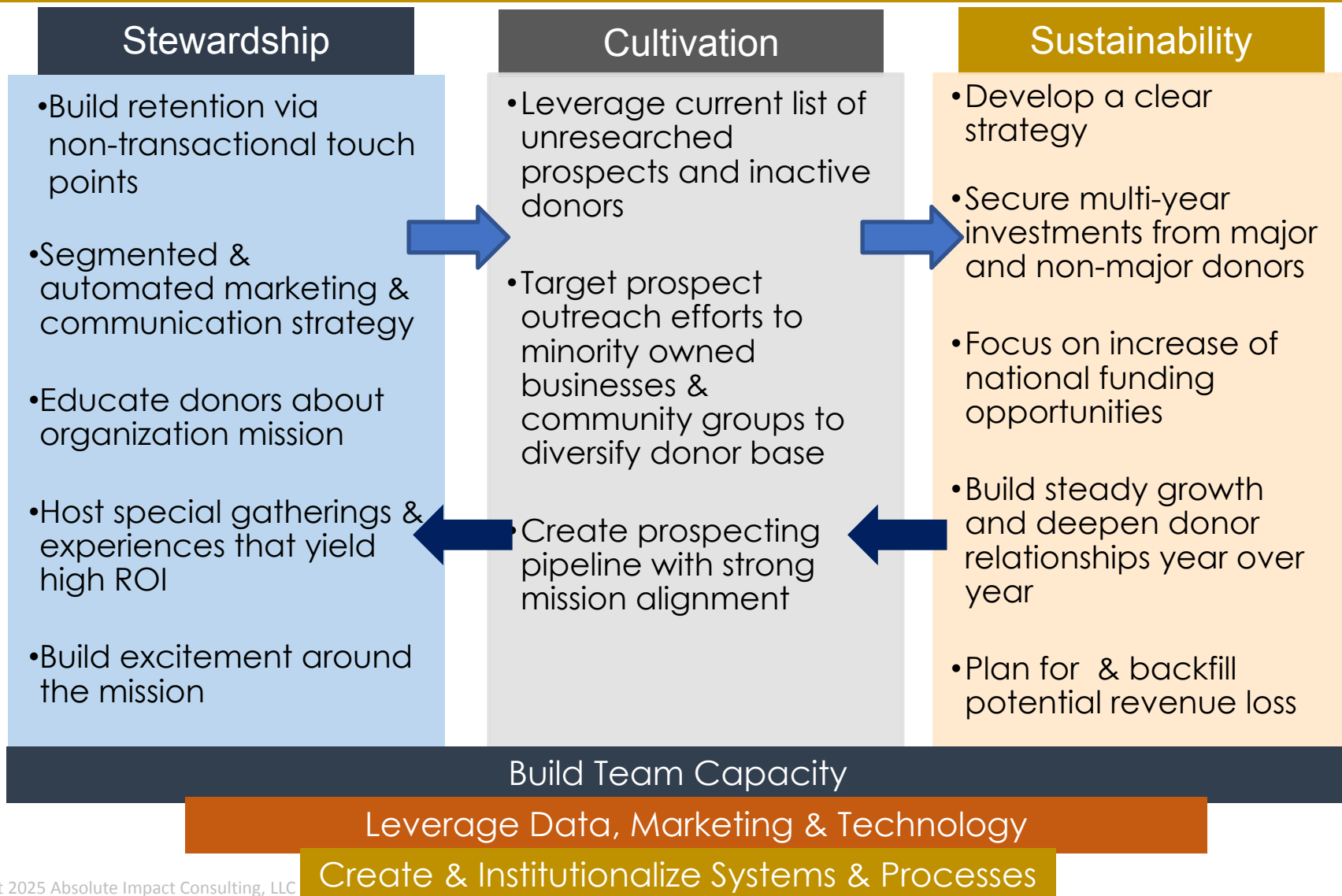
We have a  
strong recurring  
giving strategy.

☐☐☐☐

# 90-Day Plan: Consider the Donor Lifecycle



# 90- Day Plan Focus



# 90- Day Plan

## Days 1-30

### Clarify & Strengthen Your Foundation

- ☐ Identify **top 3 funding priorities** and align staff + board
- ☐ Clean and segment your **donor list/CRM**
- ☐ Launch a **weekly stewardship rhythm** (emails, calls, notes)
- ☐ Increase **CEO visibility** (1 LinkedIn post/week + 1 video/month)
- ☐ Gather **10 program stories** for consistent messaging

## Days 31-60

### Increase Donor Engagement

- ☐ Refresh your **Case for Support**
- ☐ Relaunch or strengthen **monthly giving**
- ☐ Run 1 **micro-campaign** (7–14 days, story-driven)
- ☐ Improve your **donation page** (mobile-first + recurring giving)
- ☐ Host **3-5 donor**

## Days 61-90

### Grow & Convert

- ☐ Segment donors (major, mid-level, new, lapsed) with clear next steps
- ☐ Launch a **lapsed donor re-engagement sequence**
- ☐ Activate **LinkedIn champions** (board, alumni, partners)
- ☐ Schedule **5–7 major donor discovery calls**
- ☐ Build your **next 90-day fundraising**

Build Team Capacity

Leverage Data, Marketing & Technology

Create & Institutionalize Systems & Processes



# QUESTIONS?

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In the top right corner, there are several overlapping geometric shapes: a large white triangle pointing down, an orange triangle pointing down, and a yellow triangle pointing up.

# Fundraising Fitness

## How to Stay Strong in Challenging Times