

**Welcome, and thanks for joining!**

Building Your Fundraising Machine

**This webinar will begin soon.**





# Agenda

**5 minutes** — Welcome & Introductions

**15 minutes** — Overview of annual fundraising plans

**10 minutes** — 10 tips for year-round fundraising success

**30 minutes** — Breakout rooms to workshop annual plans

**15 minutes** — Q&A



**Curio**  **412**  
SOCIAL SECTOR CONSULTANCY

Purpose-driven consultant

Serving nonprofits for nearly a decade

Chronic Volunteer

Excited by helping others leave a lasting impact  
on the places they call home.

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# Host, Tori Meglio

📍 - Pittsburgh, Pennsylvania

👋 - Director of Customer Success, Givebutter

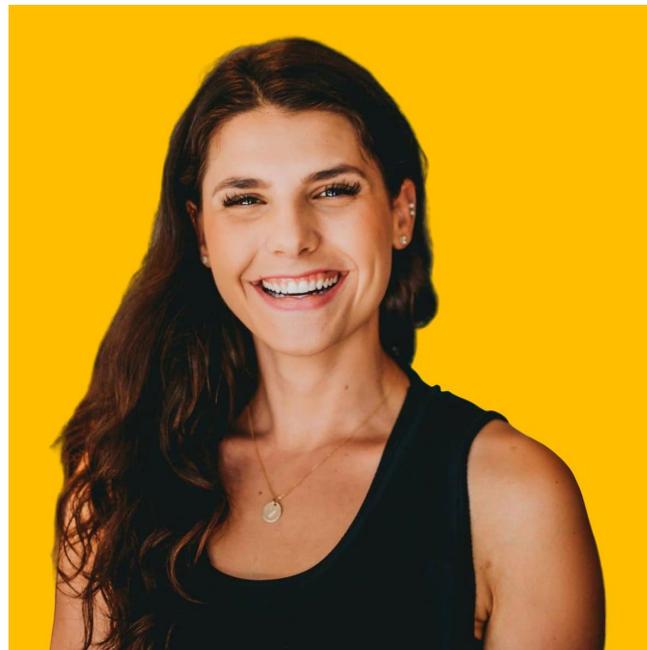
📚 - Advocating for school choice and arts education

😄 - Specializes in the technical documentation and implementation of human-centered systems

💛 - Electrified to grow both the business and heart of organizations

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# Givebutter — Raise more. Pay less. Give better.

The image displays the Givebutter interface across three devices: a tablet, a smartphone, and a laptop. The tablet shows a dashboard with a campaign overview, a bar chart for 'Welcome back Max!', and a sidebar menu. The smartphone shows a donation modal for 'Donate to Dance Marathon' with various amount options and a 'Continue' button. The laptop shows a campaign page for 'Support Our Fundraiser for Dance Marathon' with a large crowd photo, a progress bar for '\$1,230 by 17 people', and a list of donors with their names and amounts.

“Givebutter” = “A better way to give” 🍷



# Annual fundraising plans

- ✓ **1:** A documented strategy to raise funds
- 👁️ **2:** Common strategies to follow
- 📱 **3:** Ways to implement
- ⚠️ **4:** Obstacles
- 🎉 **5:** Pro tips

9 steps for fundraising planning →



- ✓ Includes fiscal **goals** and **timelines** that align with your budget
- ✓ Has high-level strategy for how to reach different donor segments and methods
- ✓ Improves accountability and impact



# Annual fundraising plans

👁️ **2:** Common strategies to follow

📱 **3:** Ways to implement

⚠️ **4:** Obstacles

🎉 **5:** Pro tips

[Set up a fundraiser in 4 easy steps →](#)



- ✓ Major donors
- ✓ Online donations
- ✓ Grants
- ✓ Events / P2P
- ✓ Corporate partners
- ✓ Monthly giving
- ✓ Special appeals



# Annual fundraising plans

 **3:** Ways to implement

 **4:** Obstacles

 **5:** Pro tips

[Multi-channel campaign example →](#)



- ✓ Finalize and share with fundraising team and Board of Directors
- ✓ Pick one software to track progress (Google Sheets, Asana, Notion, etc.)
- ✓ Weekly, monthly, and quarterly team meetings



# Annual fundraising plans

! 4: Obstacles

🎉 5: Pro tips

Evolving in-person to digital events →



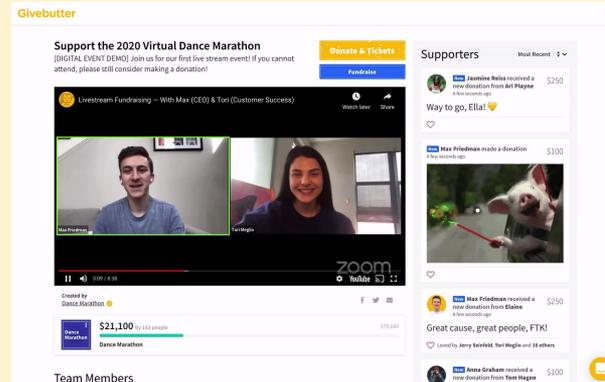
- ✓ Seasonal and unpredictable dry spells
- ✓ Low donor retention
- ✓ Failure to obtain major gifts
- ✓ Poor fundraising event attendance
- ✓ Inadequate board buy-in
- ✓ Lack of diverse fundraising methods



# Annual fundraising plans

## 5: Pro tips

Hire a Givebutter Verified Partner →



Givebutter

### Support the 2020 Virtual Dance Marathon

(DIGITAL EVENT DEMO) Join us for our first live stream event! If you cannot attend, please still consider making a donation!

[Donate & Tickets](#) [Fundraise](#)

Live Stream Fundraising — With Max (CEO) & Tori (Customer Success)

Created by Dance Marathon

**\$21,100** by 103 donors

Team Members

Supporters

- Jessie Reibe received a new donation from Ari Payne \$250
- Way to go, Ella! ❤️
- Max Friedman made a donation \$100
- Max Friedman received a new donation from Elaine \$250
- Great cause, great people, FTK!
- Jesse Graham received a new donation from Tom Wiggins \$100

- ✓ Evaluate the last 1-3 years and mine your donor data
- ✓ Follow giving trends
- ✓ Play to your team's unique strengths
- ✓ Ask colleagues to review or hire a consultant for feedback





# Top tips for year-round success

- ✓ **1:** Have a plan
- 👁️ **2:** Make it easy to follow
- 📱 **3:** Make it multichannel
- 📺 **4:** Lead with video
- 📣 **5:** Recruit Giving Tuesday ambassadors

[9 steps for fundraising planning →](#)





# Top tips for year-round success

👁️ **2:** Make it easy to follow

📱 **3:** Make it multichannel

📺 **4:** Lead with video

📣 **5:** Recruit Giving Tuesday ambassadors

🎉 **6:** Make it fun

[Set up a fundraiser in 4 easy steps →](#)



- ✓ Modernize your donation form to make it easy to give
- ✓ Accept multiple payment options



# Top tips for year-round success

 **3:** Make it multichannel

 **4:** Lead with video

 **5:** Recruit Giving Tuesday ambassadors

 **6:** Make it fun

 **7:** Collaborate with others

[Multi-channel campaign example →](#)



- ✓ Share one consistent message
- ✓ Keep your ask simple and specific
- ✓ Update website and fundraising page
- ✓ Spruce up your social media accounts
- ✓ Have a few emails written and ready
- ✓ Set up mobile donations and sharing



# Top tips for year-round success

-  **4:** Lead with video
-  **5:** Recruit Giving Tuesday ambassadors
-  **6:** Make it fun
-  **7:** Collaborate with others
-  **8:** Highlight a monthly giving program

Evolving in-person to digital events →



- ✓ “Show, don’t tell.”
- ✓ Videos don’t need to be lengthy
- ✓ Highlight a compelling individual story
- ✓ Show engaging imagery
- ✓ Clearly state the next action step



# Top tips for year-round success

- 📣 **5:** Recruit ambassadors
- 🎉 **6:** Make it fun
- 👉 **7:** Collaborate with others
- 📅 **8:** Highlight a monthly giving program
- ✉️ **9:** Don't forget to say thank you

[2020 guide to Team Fundraising →](#)



- ✓ People give to people
- ✓ Ambassadors are your champions
- ✓ Provide each ambassador with the resources they need



# Top tips for year-round success



**6: Make it fun**



**7: Collaborate with others**



**8: Highlight a monthly giving program**

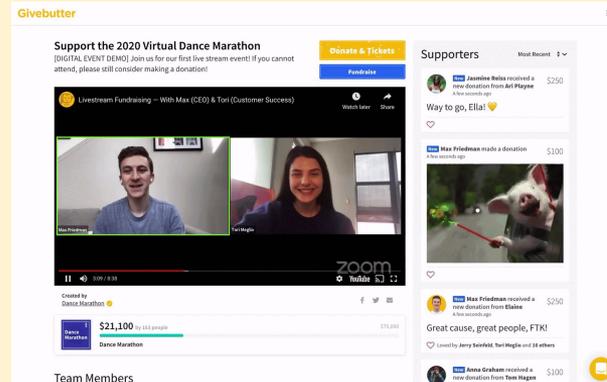


**9: Don't forget to say thank you**



**10: Give Better. All year round.**

**MAGFest creates hilarious fundraiser →**



- ✓ Supporter feed
- ✓ Trackable Team links
- ✓ Leaderboard



# Top tips for year-round success

-  **7:** Collaborate with others
-  **8:** Highlight a monthly giving program
-  **9:** Don't forget to say thank you
-  **10:** Give Better. All year round.



- ✓ Double the viewers and engagement
- ✓ Get event sponsors
- ✓ Gain corporate matching gifts
- ✓ Do twice as much good

Teachers' Treasures wins with sponsors →



## Top tips for year-round success



**8:** Highlight a monthly giving program



**9:** Don't forget to say thank you



**10:** Give Better. All year round.

[How to measure donor retention →](#)



- ✓ Monthly retention rate is 90%
- ✓ Build momentum beyond Dec 1
- ✓ Give concrete donation levels
- ✓ Temporarily update donation form and website to reflect Giving Tuesday



## Top tips for year-round success

✉️ **9:** Don't forget to say thank you

🚀 **10:** Give Better. All year round.



- ✓ Automated, customizable receipts
- ✓ Exporting donor data
- ✓ Native integrations

Aspire! gives thanks →



# Top tips for year-round success

 **10:** Give Better. All year round.



✓ Donor stewardship

[Learn more →](#)   [Live demo →](#)



**Breakout rooms** ⚡



**Live Q&A** 🤗



**Thank you for joining!**

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 **Contact:** [ckeller@curio412.com](mailto:ckeller@curio412.com)

 **Join** Givebutter's private  
Facebook group

 **Join** the Resiliency  
Collaborative group