



# Focused Fundraising

Prioritizing What Matters Amid  
Competing Demands

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***Do you feel busy, overwhelmed, or  
overworked and yet...  
never have enough time for what really  
matters?***

**What are your priorities?**

**What is competing for your time?**

If we don't plan for both of these questions... we will lose.

# What we will cover today:

- Strategic planning guides missional alignment across all ministry or mission domains
- Identify and prioritize the most critical tasks
- Prepare well for key fundraising decisions
- Minimize distractions to raise more money
- Cultivate intentionality as you lead your team's fundraising efforts

# Strategically Planning What's Important

## Rocks vs. Sand



You have to make time for the things that really impact the organization.

And you have to prioritize the things that will allow you to keep your job.

# Priorities vs. Distractions

Donor Relations

Department Strategy

Team Meetings

Communication/Writing

Hiring/Training

Data Analysis/Reporting

Email

Social Media/Research

Impromptu Meetings

Technology fails

Last minute projects

Interruptions

# Defining Donor Care

- What is Donor Care?
- Best Practices Donor Care
  - What is it?
  - How often?



# Preparing for Decision Making

- **Planning to Prepare**
  - What will I need to be prepared for this month, next quarter, next year?
  - When are my seasons of downtime vs. crunch time?
  - What tends to dominate my schedule and when does this happen?
- **Prepare to Think & Decide**
  - Creating time to 'Think' intentionally
  - Considering the needs of the organization (Needs Assessment)
  - Think about the things you are going to have to execute on later
  - Intentionally think about the donors in your portfolio
  - Think forward on areas important to your boss, staff, or team
- **Preparing to have a fresh Perspective**
  - Reading ahead of your donors. What are they interested in?
  - Are you prepared for their conversations or planning to wing it?

# Minimizing Distractions to Raise More Money

- Acknowledge that ‘distractions happen’. Plan for it...but don’t let it win.
- Schedule a day a week (or even a half day) for phone calls, thank you notes, meetings, etc. with only donors.
  - KEY: Be in a place/space where you WILL NOT be distracted.
  - Be willing to NOT be at the office.
- Fundraising needs to be a BIG ROCK!

# FOCUSED FUNDRAISING - INTENTIONALITY



# Leading your team to plan for better results

- Make preparation a goal, a key value, and an expected part of the work.
- Your team will follow your leadership - as you make planning a priority.
- Creating new rhythms begins with you.
- Set KPI's based on your preparation and expect better results.



# Next Steps

1. Identify your key priorities and regular distractions.
1. Create a list of the donors that you need to be cultivating a relationship with.
  - Be able to track...1. What the purpose of the meeting was. 2. What you learned in the meeting. 3. The Next Step
    - 4 Stages to an Ask: Casual Conversation → Tour → Sharing the Case → The Ask
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# Next Steps

4. Incorporate a “Think Day” once a month.
5. Be prepared for every meeting - be clear with yourself and the donor of the “purpose” of meeting.
6. Accountability - If you are in a Capital Campaign, your Campaign Manager (CM) and your Campaign Steering Committee (CSC) should be holding you accountable for the steps listed above.

What will your **PRIORITIES** be when it comes to focusing on Fundraising?

What do I need to be **KEENLY AWARE OF** that is competing for my time?



# Open Discussion/Q & A



**Thank you for attending**  
***Focused Fundraising***

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