raise funds faster
setting up a one-man fundraising operation

4.0 COMMUNITY SUMMIT
fundraising workflow

- **ENGAGE**
  - RESEARCH: Identify prospective partners through multiple channels
  - OUTREACH: Plan strategic opportunities to make contact with prospects
  - CULTIVATE: Regular touch points intended to build relationships

- **PROPOSE**
  - LAUNCH: Meeting to determine proposal approach and roles
  - DRAFT: Program and communications team write proposal
  - APPROVE & SUBMIT: Proposal is approved and submitted by development team

- **TRACK**
  - RECORD: Grant agreement and report deadlines are documented
  - REPORT: Program and development team fulfill report
  - RENEW: Management & development team pursue renewal
When it comes to fundraising, what gives you the most anxiety?
Failure to have efficient systems = $$$ left on the table
<table>
<thead>
<tr>
<th><strong>WHY SHOULD I FOCUS ON SYSTEMS?</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>BE FASTER.</strong></td>
</tr>
<tr>
<td>With strong systems, you can get more outreach done, handle more cash-in, and build a pipeline faster.</td>
</tr>
<tr>
<td><strong>BE SMARTER.</strong></td>
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<tr>
<td>Systems allow you to make smarter decisions about who you should talk to, what’s working, and what tools you need/don’t need in your kit.</td>
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<tr>
<td><strong>BE CLEAR.</strong></td>
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<tr>
<td>As your organization grows, you will have to pass on responsibility. Gain clarity on your process so you can coach your growing team.</td>
</tr>
<tr>
<td><strong>BE ORGANIZED.</strong></td>
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<tr>
<td>When you are handling money that is not yours. You need to keep track of EVERYTHING. If you don’t, this will inevitably bite you in the butt.</td>
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BOTTOM LINE

CREATE SYSTEMS AS SOON AS POSSIBLE
**Engage**

**Research**
Identify prospective partners through multiple channels

**Outreach**
Plan strategic opportunities to make contact with prospects

**Cultivate**
Regular touch points intended to build relationships

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**Propose**

**Launch**
Meeting to determine proposal approach and roles

**Draft**
Program and communications team write proposal

**Approve & Submit**
Proposal is approved and submitted by development team

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**Track**

**Record**
Grant agreement and report deadlines are documented

**Report**
Program and development team fulfill report

**Renew**
Management & development team pursue renewal
Engage

Research
Outreach
Cultivate
PROPOSE

LAUNCH

DRAFT

APPROVE & SUBMIT
LAUNCH MEETING

- brainstorm
- timeline
- roles
BRAINSTORM

let's practice.
**DRAFT**

**Collaborate**

Use collaboration tools and document sharing tools to collaboratively write your draft.

**Meet Deadlines**

It will feel like work is piling up. Meet the deadlines you set for yourself and your team.

**Solicit Feedback**

What you write yourself is fine. Be better than fine. Get feedback from smart people who have done this before.
# Reporting Made Easy

<table>
<thead>
<tr>
<th>BE HONEST</th>
<th>Don't lie. Your funders will find out.... eventually. It will break trust and erode your relationship. That means less money.</th>
</tr>
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<tr>
<td>HAVE DATA</td>
<td>Hard data. That means numbers. But also anecdotal data ready to go. Show impact in as many ways as you can.</td>
</tr>
<tr>
<td>START TRACKING NOW</td>
<td>It will save you tons of time to track specific metrics as soon as the money comes in.</td>
</tr>
</tbody>
</table>
QUESTIONS?