

Effective Fundraising Strategies and Tactics in a New Era

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Agenda

- Welcome, Introduction, Warm-Up
- Recap: How Fundraising Has Changed
- Most Valuable Skills for Fund Development
- How to Distinguish Your Nonprofit from Others
- How to Grow Unrestricted Funds
- How to Leverage AI
- Sample script for conversations
- Other Topics: Staying Compliant, Converting Restricted Funds to Unrestricted
- Q&A
- Resources and Adjourn



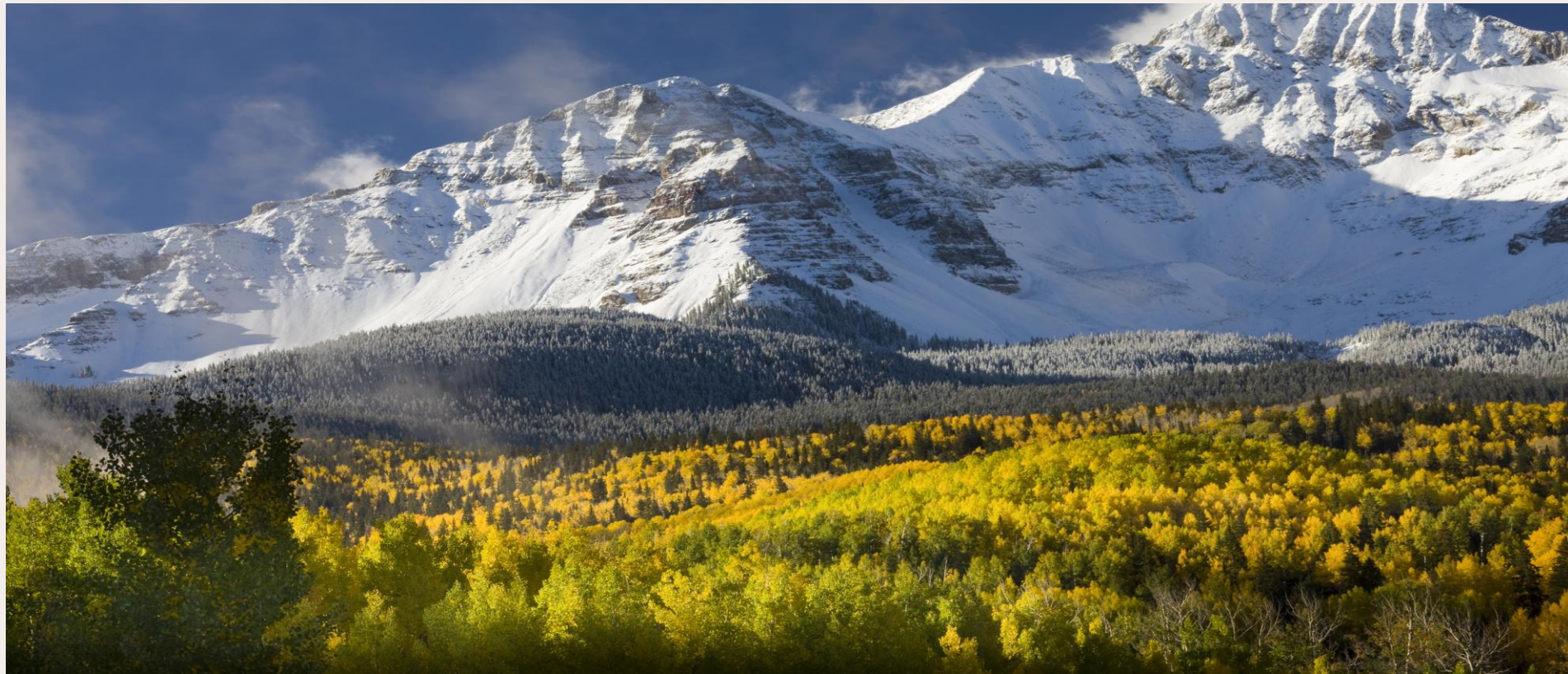
About Me

Warm Up

If you have used ChatGPT/AI before, share one thing you have used it for



How the Funding Landscape Has Changed



(Recap): Fundraising: What Has Changed

- More uncertainty around federal and public funding
- More competition for funding/less reliability with the same set of funders
- More accountability (data expectations, outcomes vs. activities)
- Increase in use of technology and digital platforms

(Recap): Fundraising: What This Moment Calls For

- From fundraising to fund development
- Diversified revenue streams
- Broader reach beyond your usual audience
- Ability to be a great storyteller including to connect your mission and impact to a bigger context (the economy, workforce, etc.)
- Doubling down on connection and building relationships
- Creative fundraising and engagement approaches

Shift from Fundraising to Fund Development

	Fundraising	Fund Development
Focus	Income generation	Relationship building
Who	Specific staff and Board	Everyone who cares about the organization
Timeframe	Budget cycles	Longer term
Approach	Specific asks/campaigns	Strategic planning and partnerships, donor stewardship, communications strategies, etc.

Most Valuable Skills for Your Fund Development Efforts

Top Skills and Qualities to Practice and Strengthen

1. Cold outreach and starting a conversation with people
2. Asking questions to engage people and learn more about them and their interests and connection to the cause
3. Active listening including to listen for connections between their experiences and the cause/what your organization does
4. Storytelling and other communication skills that help you share your organization's impact in different ways

Top Skills and Qualities to Practice and Strengthen

5. Making connections (e.g. how your organization's work strengthens the economy/makes second-order impact beyond the people you directly serve/support)
6. Timely follow-up/reliability
7. Honesty and transparency

How to Distinguish Your Nonprofit from Others

How to Distinguish Your Nonprofit



How to Distinguish Your Nonprofit

1. Be clear on what your mission looks like in practice (the “what”/what is the challenge you’re addressing), and what your core values are and look like in practice (the “how”). This will help you define your unique approach to the challenge
2. Be able to answer the question, What would happen if we didn’t exist?
3. Define/prioritize your target audience that you want to help/support: e.g. certain geographic regions, demographics, etc. within a larger population
4. Highlight staff/volunteer lived experience connected to your mission: this may be underestimated but each person’s relevant personal story is so powerful to understand and address the challenge

How to Distinguish Your Nonprofit

5. Position your organization as a “field builder”: bringing together other similar organizations focused on the same populations to collaborate, including on funding proposals
6. Track and share your impact across multiple measures, including a sense of community and belonging among the people you support. Tell stories that help people feel your impact. (If you’re not sure you’re capturing all measures, ask the people involved in your programming the ways it is helping them.)
7. Showcase accountability and transparency: Share about your progress, where funding goes, and how it is being spent to advance your mission
8. Recognize that everything you share shapes your brand-so be intentional and aim to be compelling and unique in your approach and what you share
9. Seek feedback and pursue continuous improvement. Get 1% better each day

How to Grow Unrestricted Funds

Benefits of Unrestricted Funding

- Can put the money toward what you need most: staff salaries, growing staff, technology, etc.
- Can plan longer-term and be more innovative vs. just meeting urgent budget needs
- Can support strategic planning and implementation, test out new ideas, and fund functions like communications, development and research/evaluation that can be more difficult to fund when funding is more restricted to programming

How to Grow Unrestricted Funds: Earned Revenue

Ways to grow earned revenue:

- Trainings and workshops
- Conferences/convenings
- Merchandise
- Membership dues
- Corporate partnerships
- Licensing of curricula
- Funding campaigns for the organization



Earned Revenue: Examples

- **Trainings and workshops:** In-person and/or online modules on advocacy 101 and how to advocate effectively; and how to understand and influence the policymaking process at different levels (local, state, federal)
- **Conferences/convenings:** identify a topic or issue people are saying they want to explore more, are excited about, and/or is a current challenge, and organize a convening around it. Secure sponsors for the event costs and charge a fee to attend
- **Merchandise:** selling hats, t-shirts, mugs, etc. with your organization's branding; can help people feel a part of your organization and raise awareness through visibility

Earned Revenue: Examples

- **Membership dues:** recurring payments to become a formal partner/customer with access or discounts to events and exclusive opportunities like trainings, etc.
- **Corporate partnerships:** partnering with a mission-aligned company that provides funding via donations, corporate giving and matching, sponsorships, and/or free marketing
- **Licensing of curricula:** charging people to buy and use your curricula for programs, trainings, etc.
- **Funding campaigns:** annual or capital campaigns, driven by a mix of foundation/corporate and individual donations

How to Grow Unrestricted Funds: Grants

Find the right funders:

- Use ChatGPT to search for foundations that offer unrestricted/flexible grants aligned with your organization's mission
- Research community foundations and donor-advised funds aligned with your mission
- Corporate partnerships including corporate giving programs
- Use websites like Candid, Instrument1, and GrantStation that let you filter for general operating support or unrestricted funding
- General Google searches can yield lists of foundations that fund operational grants, like [this one](#)

How to Grow Unrestricted Funds: Grants

Position your pitch:

- Practice talking about your mission and impact, and what makes your organization a unique value-add to the space you're working in
- "Our mission is__ and what makes us unique is how we __"



How to Grow Unrestricted Funds: Grants

Position your pitch:

- Prepare to share what you would prioritize with unrestricted funds, and why. Be honest, even if it is to say that it is to stabilize staff salaries first. Share why this investment is needed and how it will help you advance your mission
- Build a relationship with these potential funders: help them get to know you and your organization and see and experience the impact you are making in your community

Using AI For Fundraising

Benefits of Using AI For Fundraising

- **Save Time:** AI can save you time from additional research, writing, and analysis. This additional time can go into high-impact activities like building relationships with prospective donors and the other human activities that are so valuable
- **Gain Insights:** AI can uncover potential funders and grants you might not have known about, along with suggestions on how to strengthen your pitch and alignment with potential funders to increase your chances of securing funding
- **(Potentially) Increase Funding Secured:** With AI's support with research, analysis, and writing; plus the additional capacity you will have to reach more prospective funders, you may see a return on investment through more funding secured as a result

How to Use AI to Support Your Fundraising

- Assess fit and alignment between a prospective funder and your organization
- Generate and refine language aligned to the funder's priorities

How to Use AI to Support Your Fundraising

- Other fundraising-related tasks such as:
 - identifying a list of prospective funders and grant opportunities within defined criteria (e.g. priorities, geographic region, grantee eligibility, etc.)
 - drafting a project timeline for a proposal
 - creating talking points for a funder meeting
 - identifying gaps or areas for improvement in your strategy/proposals
- Make it your personal research assistant: ChatGPT records and remembers your prompts, so you can train it through prompts to understand your role and goals, and to craft language and strategies that match your tone and priorities. The more you use and refine it, the smarter and more tailored it becomes

Sample Prompts for ChatGPT to Support Fundraising

From “Leveraging AI Without Spending a Dime” by Maria Newhouse, August 2025:

- **Assess funder alignment:** “Here is a foundation’s mission statement: [paste]. Compare it to this draft proposal summary: [paste]. Highlight areas of strong alignment and suggest improvements.” or “Please review [funder website] and compare it to [organization website]. Where do you see potential funding alignment?”
- **Streamline content creation:** “Help me draft a one-page Letter of Inquiry for a foundation focused on [mission]. Use clear, concise language and emphasize the community impact of [organization].”
- **Personalize donor messaging:** “Write a warm and personal thank-you email for a donor who gave [\$] to support [area of interest]. Pull examples of impact from [organization’s news or blog site].”

Sample Prompts for ChatGPT to Support Fundraising

From “Leveraging AI Without Spending a Dime” by Maria Newhouse, August 2025:

- **Test and refine communications:** “Write two different subject lines for a donor appeal email focused on [topic] and recommend which might have better open rates.”
- **Strategic thinking partner:** “Brainstorm 5 innovative stewardship strategies for mid-level donors that align with [organization’s] commitment to [topic].”
- **Manage timelines and project planning:** “Create a 6-month project timeline for a [describe program], including milestones and key deliverables.”
- **Activate memory:** “Remember that in my role as [job title], I like to use a conversational tone, avoid jargon, and keep proposals under two pages when possible.”

Put a Process in Place for Using AI for Fundraising

Suggested Steps from "AI for fundraising: 10 ways to raise more (with tools)" by Kate Romain, January 2026



Sample Script for Conversations

Sample Script For a Potential Donor

Tailored from a ChatGPT script:

1. Warm Appreciation

"Hi [Name], it's great to meet you. Thanks for coming to this event; I truly appreciate your interest in our work and taking the time to learn more about what we do."

2. Conversation Starter

"What inspired your interest in or connection to [your nonprofit's cause]?"

3. Listen & Connect

(Practice active listening. Recognize their sharing and then share a short story highlighting the work). "That's such a powerful reason. It reminds me of [short, powerful impact story from your nonprofit's work]."

Sample Script For a Potential Donor

4. Share Mission & Impact

"At [nonprofit name], our mission is to [short mission statement]. Just last month, we were able to [specific impact demonstrating progress toward your mission]."

5. Gentle Invitation

"We're always looking for people who believe in this work to support us to continue and strengthen it. Even a gift of [small, approachable amount] can [specific, meaningful outcome]. Would you be interested in becoming a supporter of ours?"

6. Gratitude & Relationship Building

"Thank you so much for your support/consideration. I'd love to keep you updated on our progress and share more stories of the lives you're helping to change."

Sample Conversation Prompts

- What is your connection to this cause?
- Tell me more, what was that experience like?
- What made a difference to you when you went through that? (What do you wish you had, or had more of, that we could think about strengthening in our work?)
- In what ways are you interested in getting involved? (Then share with them some options including volunteering and spreading the word, and ending with donating)
- I would love to stay in touch. What's the best way to reach you, and how about a follow-up conversation over coffee in a few weeks?

Converting Funds from Restricted to Unrestricted

Ensuring Nonprofit Compliance

Key Actions for Nonprofit Compliance

*From "Nonprofit Compliance Checklist: What Every Organization Needs to Stay Compliant"
July 2025 by the Charity Charge Team*

- 1) Maintain 501(c)(3) Federal Tax-Exempt Status
- 2) Register and Renew State Charity Registrations
- 3) Stay in Good Standing with State Corporate Filings
- 4) Uphold Governance and Board Responsibilities

Key Actions for Nonprofit Compliance

*From "Nonprofit Compliance Checklist: What Every Organization Needs to Stay Compliant"
July 2025 by the Charity Charge Team*

- 5) Ensure Financial Transparency and Internal Controls
- 6) Understand Fundraising and Donation Rules
- 7) Comply with Employment and Payroll Laws
- 8) Protect Donor Data and Confidential Information

Reflections



What is one thing you learned today or one takeaway that you will use going forward? Please put your response in the chat

Thank you!

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