

Nonprofit Learning Lab presents

# Fundraise Smarter, Not Harder- How to Identify High Value Fundraising Tasks

Free Webinar



Anne Hager,  
Fundraising Levers



**Post in the Chat:**

**What productivity  
challenges are you facing?**

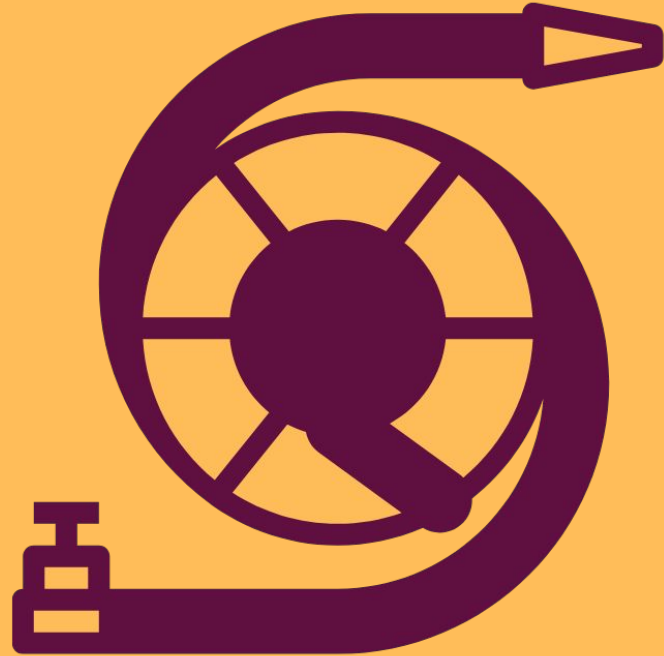
# Productivity Challenge #1

“I need to just get through this stretch and then it will get better”



# Productivity Challenge #2

“It’s my job to put out fires”

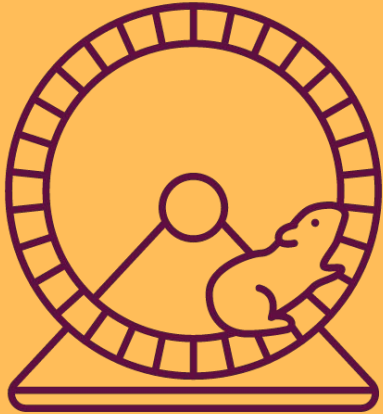


# Productivity Challenge #3

Listening to folks with no experience in fundraising



# The consequence



**FAIL**



**Goal for today:**

**Build a fundraising compass!**



# Who am I



- Anne Hager
- Cambridge, MA
- Former ED turned consultant
- I help Executive Directors raise more money





# Agenda

1. **The goal**
2. The framework
3. Apply the framework!

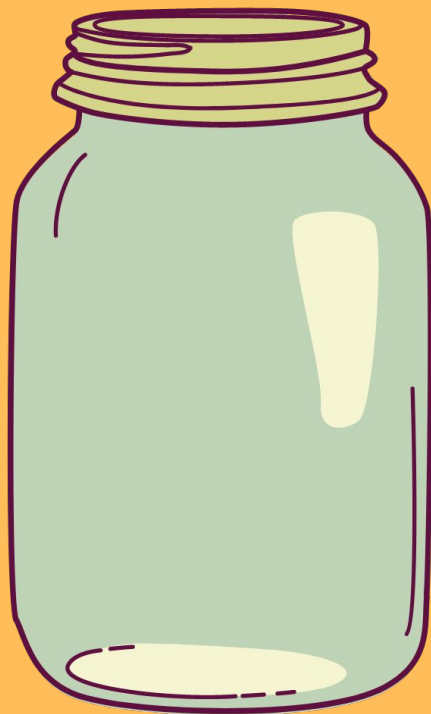


**Reflect:**

**How are you currently  
prioritizing your tasks?**



# How can everything fit in?



# Objective



# Objective



✘

YOU!

# Agenda

1. The goal
- 2. The framework**
3. Apply the framework!



# The Fundraising Compass

## Routine Tasks



Delete - delegate - automate

## Support Tasks



Delete - delegate - automate



## Executive Tasks

Execute



## High leverage tasks

Schedule & Prioritize



# Routine Tasks

*Delete - delegate - automate*

Definition:

Tasks that are time consuming and have no or very little impact on your bottom line.



# Routine Tasks

*Delete - delegate - automate*

Definition:

Tasks that are time consuming and have no or very little impact on your bottom line.

Examples:

- Note taking
- Database updates
- Managing registrations
- Anything that has to do with printing

# Support Tasks

Definition:

Necessary tasks that aren't **directly** tied to revenue generation

*Delete - delegate - automate*



# Support Tasks

*Delete - delegate - automate*



Definition:

Necessary tasks that aren't **directly** tied to revenue generation

Examples:

- Grants research
- Social media posts
- Volunteer management

# Executive Tasks

*Execute. This is your job*



Definition:

Execution of task will directly lead to more revenue

-

# Executive Tasks

*Execute. This is your job*



Definition:

Execution of task will directly lead to more revenue

Examples:

- Writing a grant
- Drafting an annual appeal
- Meet with a major donor

# High Leverage Tasks



*Schedule & Prioritize*

Definition:

Tasks that lay the foundation for your strategy and that ensure sustainability of funding.

# High Leverage Tasks

*Schedule & Prioritize*



Definition:

Tasks that lay the foundation for your strategy and that ensure sustainability of funding.

Examples:

- Data analysis
- Board training on fundraising
- Implement a planned giving program
- Fundraising strategy

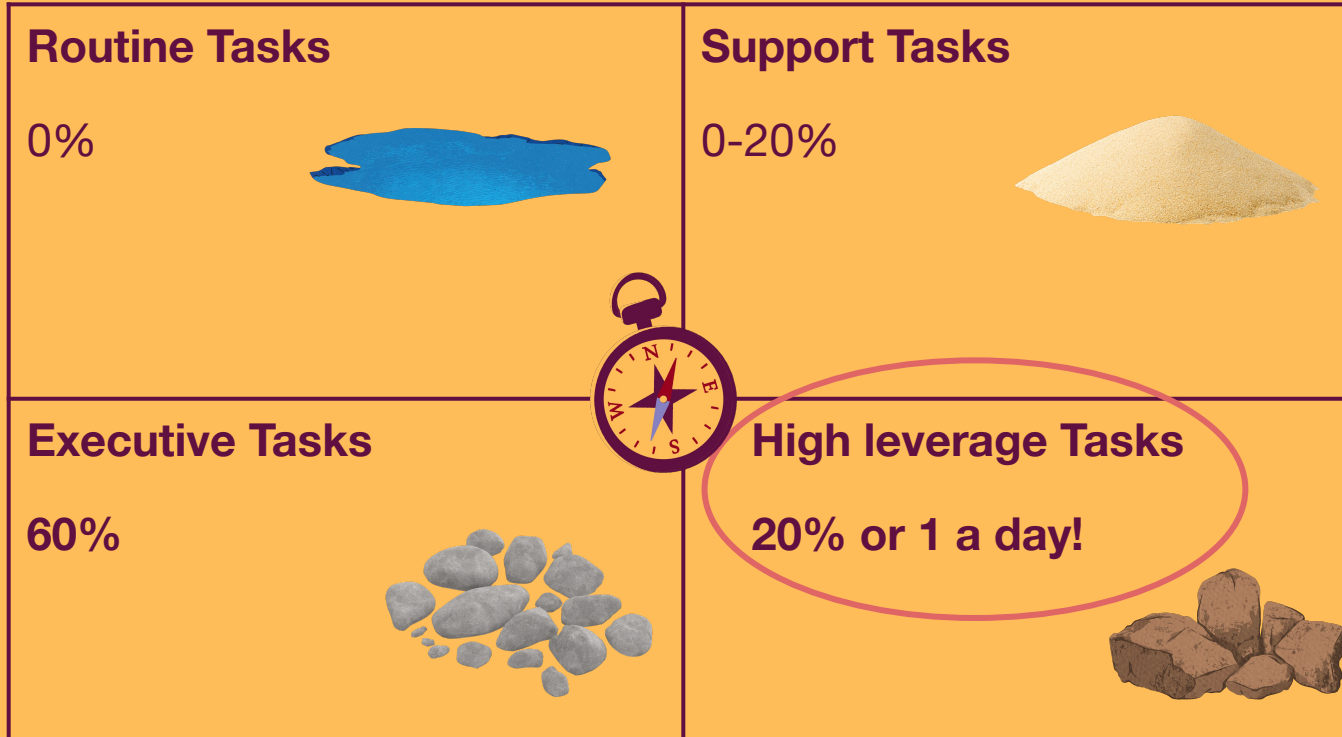
# Agenda

1. The goal
2. The framework
3. **Apply the framework!**





# How to allot your time



# More resources!



- Task prio cheat sheet
- Script to use AI as a grant assistant
- Opt out of ChatGPT using data
- An overview of free AI tools



# Questions?