

# 5 Key Strategies to Improve Your Fundraising Projects





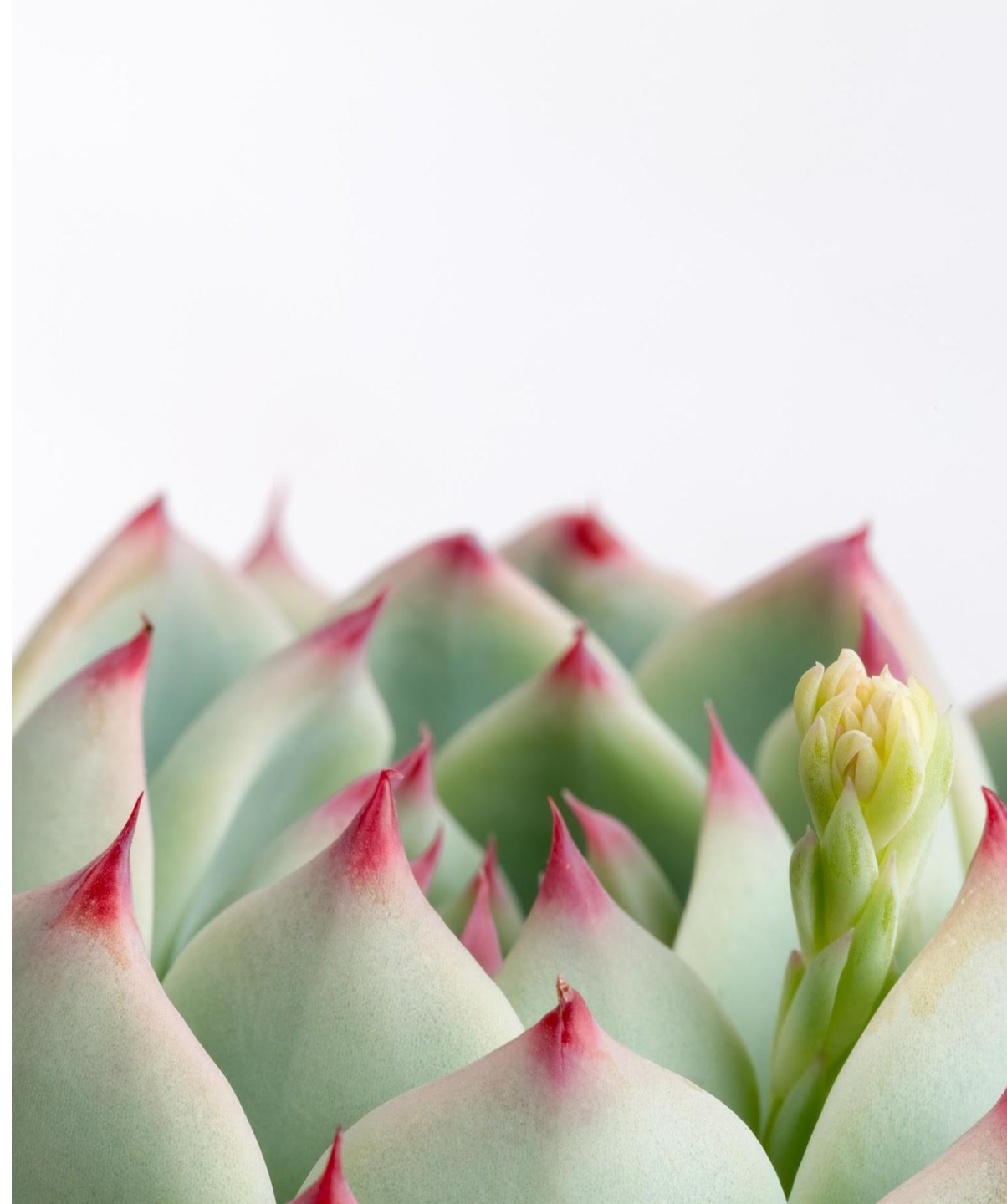
Jami Yazdani

## **Project Management & Planning Consultant**

I'm a PMP with more than 20 years of experience leading complex, high-impact initiatives. I bring both structure and empathy to the way organizations plan, collaborate, and lead change.

# Agenda

1. Fundraising & Project Management
2. 5 Key Strategies
3. Your Questions



The background of the slide is a dense, repeating pattern of white roses. The roses are in various stages of bloom, with some showing more open petals and others more tightly coiled. The lighting is soft, giving the petals a gentle, almost ethereal appearance. The overall effect is a clean, elegant, and visually appealing texture.

# **Fundraising & Project Management**



A small potted succulent plant with thick, green, rounded leaves sits on a white surface. To its right, a portion of a laptop keyboard is visible, showing keys like Tab, Caps Lock, Shift, Ctrl, Fn, A, S, D, Z, X, C, and W. The background is a plain, light-colored surface.

# What is a project?

## PMI:

“A temporary endeavor undertaken to create a unique product, service or result.”



# What is a project?

## PMI:

“A temporary endeavor undertaken to create a unique product, service or result.”

Major Gift Campaigns  
Capital Campaigns  
Annual Fund Campaigns  
Fundraising Events  
Planned Giving Programs  
Donor Management Program  
Grant Applications  
System Implementation  
Planning Initiative  
Feasibility Study  
*and.....*



**Project  
Management  
is**

**broadly  
applicable**







**Share in the  
Chat:**

**What have you worked on lately that  
could be considered a project?**





The background of the slide is a dense, repeating pattern of white roses. The roses are shown in various stages of bloom, with many petals visible, creating a textured and elegant look. The color is a soft, slightly off-white or light cream.

## **5 Key Strategies**



*Strategy 1:*

**Draft and share a  
simple scope  
statement**



## Scope

- What is the **purpose** of the project?
- Why are we working together?
- Where will we **focus** our energy and attention?
- What is **relevant**?



Scope creates a clear,  
shared vision of success.



# Simple Scope Statements

Articulate project's primary purpose, outcome, and deadline

In support of (broader goal, mission), this project will (action + broader outcome) by (deadline).

## Example Scopes

- In support of our mission to serve [a key demographic], we will pursue \$100K in major donor funding to expand user programming by March 31, 2026.
- In support of our goal to expand user programming to serve [a key demographic], this project will plan and execute a gala event to secure a net of \$100,000 in funding by March 31, 2026.
- In support of our strategic goal to strengthen donor stewardship, this project will determine the feasibility of accepting a lead gift for a new facility by March 31, 2026.



# Discuss, Document & Share Simple Scope



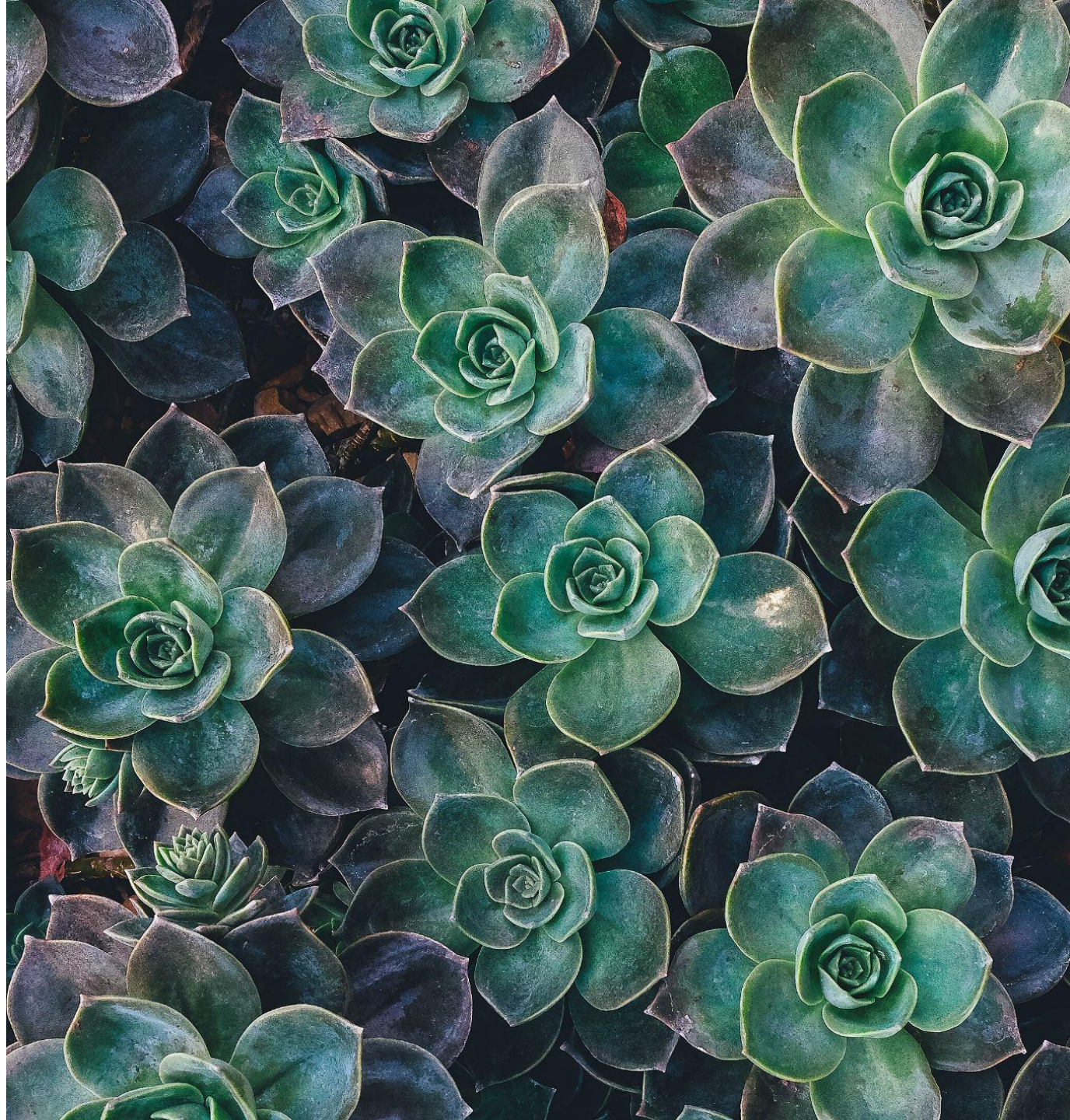
*Even if you think it is understood!*

- Creates buy-in
- Encourages *continued* engagement
- Helps avoid scope creep



# Scope Creep

Additions that  
detract and delay





# Avoid Scope Creep

Consider:

- Is it relevant?
- Is it achievable within existing project parameters?
- Is it better served as a new project?



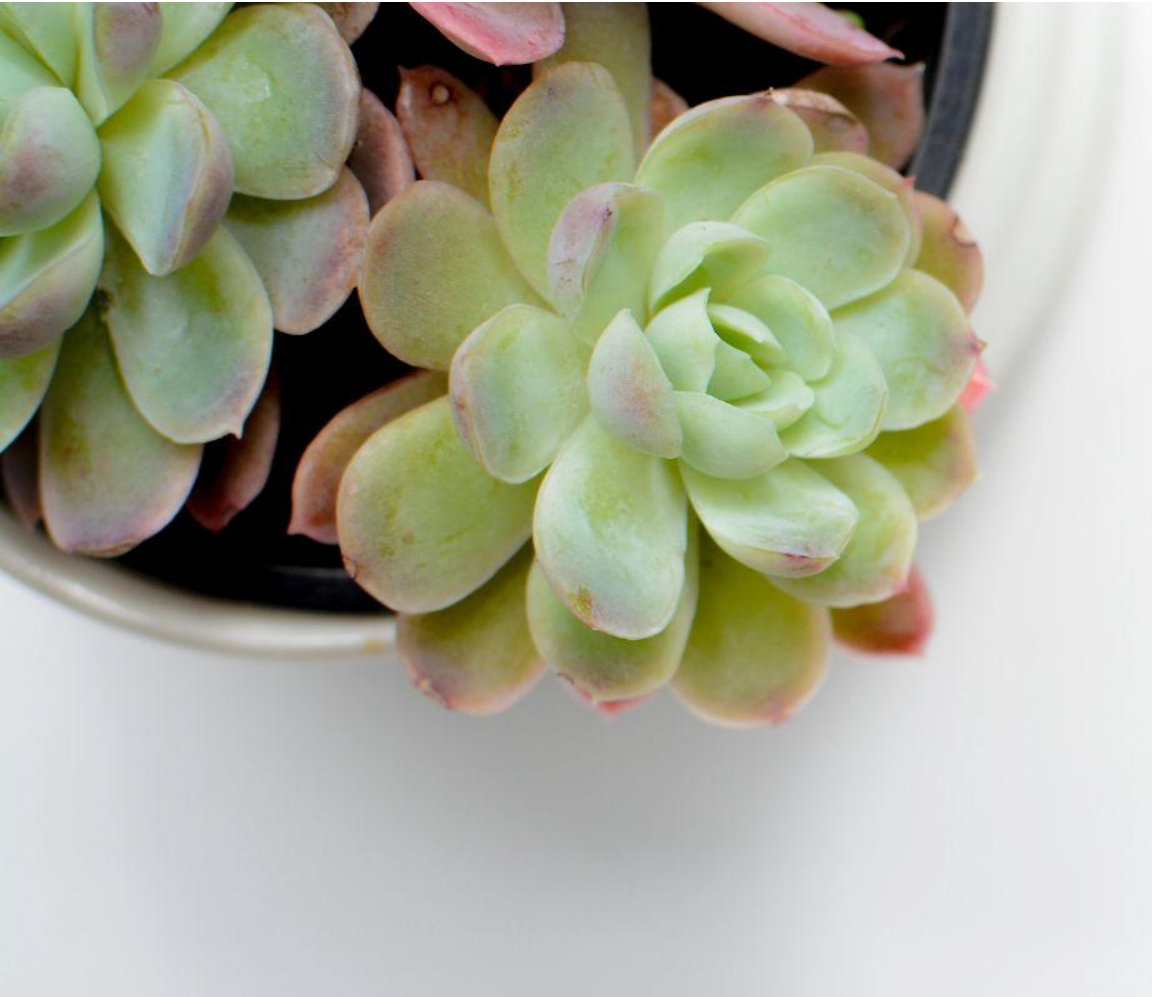
Revise and  
Communicate





*Strategy 2:*

## **Assign Project Roles to Stakeholders**



Clear roles create clear expectations for engagement.



# Stakeholders

- Who will be **impacted** by the project or project deliverables?
- Who will be **involved** in executing the project or implementing project deliverables?



# Stakeholder Planning

1. Identify stakeholders (individuals or groups)

2. Assign stakeholder roles

Including *minor* roles

Organization roles are *not* project roles





# Inclusion Matters

Inclusion impacts project decisions and outcomes, and allows for more effective and proactive planning





## Inclusion Matters

Not all stakeholders need an equal role in or equal input to the project, but all should be considered





## Common Roles: How will they engage?

- ❑ Project Sponsor or Initiator
- ❑ Project Funder
- ❑ Project Manager
- ❑ Project Team Member
- ❑ Project Contributor
- ❑ Subject Matter Expert
- ❑ Advisory Committee Member
- ❑ User/Client or Donor
- ❑ Informed Stakeholder



Action Board 0

Contacts ▾

Marketing ▾

Online Giving

Transactions ▾

Reporting ▾

















# Contact Lists

## Badges

Tag contacts with badges to easily organize them in any way you need to.

Badge Name

Create






















- Camp Volunteer (0)  
- 5K Donor (0)  
- 5K Sponsor (0)  
- Advisory Board (24)  
- Alumni (1)  
- Annual Campaign Donor (2)  
- Board Member (7)  

## Marketing Lists

Filter contacts based on any criteria to send them targeted messages

Marketing List Name

Create

- 5K (1)   
- All Campers (5)   
- Carolyn's Marketing List (26)   
- Direct Mail (179)   
- Newsletter (50)   
- RSVP Ribbon Cutting Ceremony (1)   
- Sponsor (2)   



## Share in the Chat:

Is there a stakeholder you wish you had included more in your last project?





*Strategy 3:*

## **Create a Project Communications Plan**





Intentional communication  
supports continued  
engagement

*(and it doesn't happen without a  
plan).*



## Communication Planning

Who needs to know what,  
& how and when will they  
know it?

# Communication Planning

## Who?

- Stakeholder list

## What?

*Based on their role*

- Updates?
- Progress?
- Feedback?
- Tasks?
- Decisions?
- Using?



# Communication Planning

## How?

- Email?
- Website or Social media?
- Surveys or Forums?
- Meetings?
- Documents or Dashboards?
- Task Management Tool?

## When?

- How often?
- How long?
- Access?



**Poll:** What's the biggest communication challenge you typically face in your projects?



*Strategy 4:*

## **Turn Deliverables into Tasks**





# Deliverables

- What will you create, build, design, produce, accomplish or deliver?
- Concrete or tangible **outputs**



Deliverables drive action.

# Deliverable Planning

1. Define concrete deliverables

2. Break into smaller elements until you get to tasks

**Don't try to create a long list of tasks!**





# Define Deliverables

## *Scope:*

In support of our goal to expand user programming to serve [a key demographic], this project will plan and execute a **gala event** to secure a net of \$100,000 in funding by March 31, 2026.

## *Deliverables/Outputs:*

- Event Plan
- Marketing Plan
- Event/Registration Website
- Marketing Materials
- Sponsor Packages
- Gala
- Post-Event Financial Report

# Break Deliverables into Tasks

## ***Deliverables:***

- Event Plan
- Marketing Plan
- Event/Registration Website
- Marketing Materials
- Sponsor Packages
- **Gala**
- Post-Event Financial Report

## ***Tasks:***

- Book Location
- Secure Band
- Book Catering
- Finalize Agenda
- *and more....*



# Tasks

- Assign to stakeholders
  - *Connection to deliverables encourages engagement*
- Assign due dates
- Track progress



Boards9▼Contacts▼Outreach▼Online Giving▼Transactions▼Reporting▼Automations▼

Otto

ActionBoard

ROB BURKE

IGNORE

ASSIGN

COMPLETE

FILTER

CUSTOMIZE

+ Add Action

☑ Nudges (2)

All

REACH OUT TO SHELLAGH BREAKWELL  
CREATED 2/21/24

ASK OTTO

Let me help you with this!

1

Ask Otto

REASON

Daily 5 - reach out to me today!

SB Shelagh Breakwell

REACH OUT TO SHERLINE BRANDES  
CREATED 8/15/23

ASK OTTO

Let me help you with this!

1

Ask Otto

REASON

Daily 5 - reach out to me today!

SB Sherline Brandes

☑ Actions (6)

14 Days

MAKE AN ASK TO TOBY ROBINSON  
DUE 9/18/24

ACTIVITY

End-Of-Year Ask

REASON

Activity: End-Of-Year Ask

TR Toby Robinson

MEET JOSEITO BUEY  
DUE 4/11/24

ACTIVITY

Meet Joseito Buey (Birthday Follow-Up)

REASON

Joseito Buey's birthday is on April 8, 1987.

JB Joseito Buey

TEXT CARON BROWN  
CREATED 8/15/23

ACTIVITY

Text Caron Brown (Daily Five Follow-Up)

REASON

Daily 5 - reach out to me today!

CB Caron Brown

TASK FOR SASHENKA BOOLER (DAILY FIVE FOLLOW-UP)  
DUE 9/26/23

ACTIVITY

Task for Sashenka Booter (Daily Five Follow-Up)

REASON

Daily 5 - reach out to me today!

SB Sashenka Booter

EMAIL JOSEITO BUEY  
CREATED 10/20/23

ACTIVITY

Email Joseito Buey (Daily Five Follow-Up)

REASON

Daily 5 - reach out to me today!

JB Joseito Buey

CALL IN 30 DAYS  
DUE 2/27/24

ACTIVITY

Completed (2)

Today

10 items hidden by filters. [Show all](#)

MAKE AN ASK TO FRANCINE AINSBY  
COMPLETED 7/31/25

ACTIVITY

Askboard

FA Francine Ainsby

FOLLOW UP WITH JEFF  
COMPLETED 7/31/25

ACTIVITY

Follow up with Jeff

JD Jeffrey Davis

Snoozed (1)

3 Days

REACH OUT TO SHERLINE BRANDES  
SNOOZED UNTIL 8/1/25

ASK OTTO

I encourage you to reach out to Sherline with a personal phone call. Given her history of generous support, including her last donation of \$934.25 on May 1, 2023, a direct conversation can help rekindle her connection to Dream Kids. Start by expressing gratitude for her past contributions and share a heartfelt story ab...

More

Otto

SB Sherline Brandes

?

YC



*Strategy 5:*

**Celebrate Milestones**



## Milestones

- Key points:
  - in the project
  - in building deliverables
  - in larger or longer-term tasks
- Allow us to monitor progress and celebrate success.



Don't wait till the project ends to express gratitude or recognize successes.





## Progress Check-ins

- For larger or longer-term tasks, check-in with task owner before the deadline

## Plan for Recognition

- Add celebrations and thank-yous to your plans

# 5 Key Strategies to Improve Your Fundraising Projects:



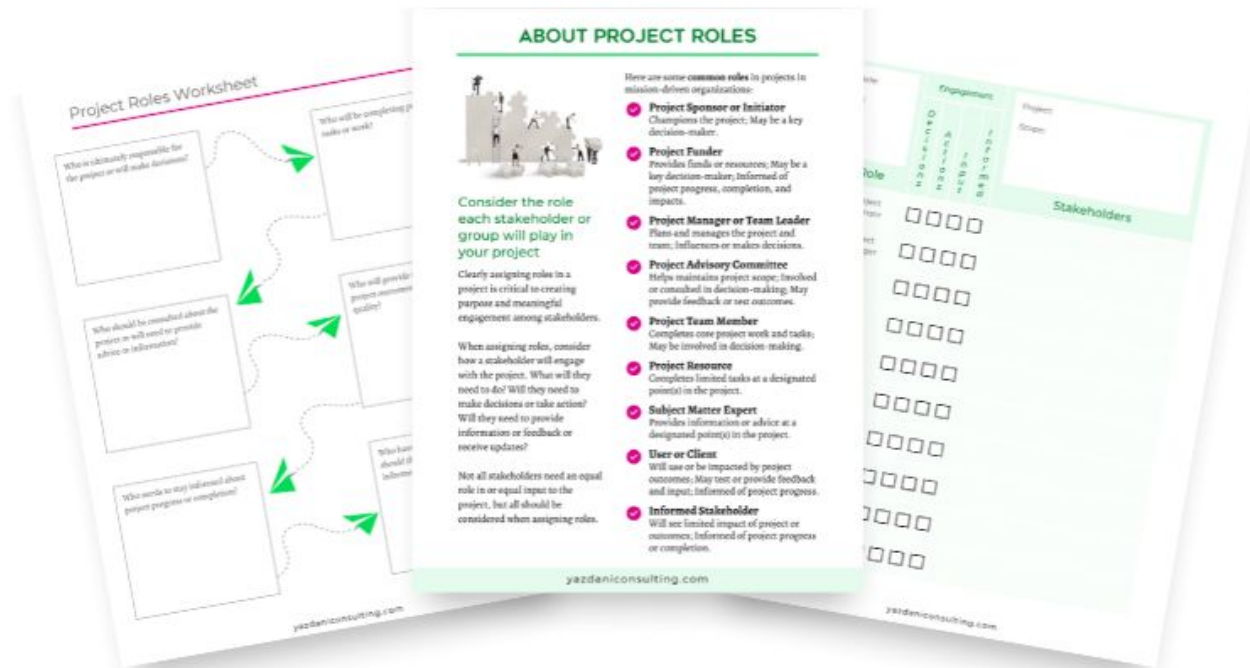
1. Draft and share a simple scope statement
2. Assign Project Roles to Stakeholders
3. Create a Project Communications Plan
4. Turn Deliverables into Tasks
5. Celebrate Milestones





**Poll:** Which of the 5 strategies do you think will be the most challenging to implement?

# Project Roles Guide



[guides.yazdaniconsulting.com/rolesguide](https://guides.yazdaniconsulting.com/rolesguide)

THANK YOU —————





# Let's Connect



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