# Building a Fundraising System That Works

*A practical field guide to structures, relationships, and habits that make fundraising sustainable.*

## THE BIG IDEA

Fundraising is an organizational system—not a department working alone. Build dependable routines for setting priorities, sharing information, making decisions, cultivating relationships, and learning from results.

## SIX PRACTICES THAT HELP YOUR SYSTEM THRIVE

***TARGETS*** Translate the annual revenue goal into source-specific targets, quarterly milestones, and clear priorities.

***HUDDLE*** Hold a short, recurring development–finance–programs check-in; resolve bottlenecks before deadlines.

***ROLES*** Assign one accountable owner to every funding opportunity, donor relationship, deliverable, and decision.

***INFORMATION*** Maintain one trusted home for donor records, proposal deadlines, program outcomes, and financial data.

***VISIBILITY*** Use a shared pipeline showing opportunity, amount, stage, next action, owner, and due date.

***EVALUATION*** Review progress monthly; distinguish activity (meetings, asks) from outcomes (gifts, renewals, retention).

## YOUR MINIMUM VIABLE FUNDRAISING TOOLKIT

☐ One-page revenue plan: goal by source, assumptions, owner, quarterly checkpoints.

☐ Shared opportunity pipeline: prospect/funder, ask amount, stage, next step, owner, due date.

☐ Relationship calendar: cultivation, solicitation, acknowledgment, stewardship, renewal.

☐ Simple responsibility map: who leads, contributes, approves, and receives updates.

☐ Monthly dashboard: raised vs. goal, pipeline coverage, pending asks, renewals, and risks.

## A MEETING RHYTHM THAT BUILDS ACCOUNTABILITY

WEEKLY (15 minutes): Upcoming asks, deadlines, blockers, next actions.

MONTHLY (30–45 minutes): Revenue vs. plan, pipeline, cash-flow assumptions, cross-team decisions.

QUARTERLY (60 minutes): Reforecast, evaluate what worked, adjust priorities and ownership.

## THREE QUESTIONS TO ASK BEFORE BUYING ANOTHER TOOL

1. What specific decision or workflow will this improve?
2. Who will own and maintain the information?
3. What existing process can we simplify or stop?

## START SMALL. MAKE IT STICK.

☐ Choose ONE THRIVE gap.

☐ Name an owner.

☐ Test ONE improvement for 90 days.

☐ Define success before you start.

☐ Review and refine together.

**ASSESS → ALIGN → ACT**