



Building a Strong Foundation for Sustainable Fundraising

Presented by:

Eva Rachau

*Director of Development,
Chicago History Museum*



SPONSORS



THE CHICAGO
COMMUNITY TRUST®

EQUITY • OPPORTUNITY • PROSPERITY

The Chicago Community Trust

MacArthur
Foundation

MacArthur Foundation



CHICAGO
CULTURAL
ALLIANCE



INTRODUCTIONS

Eva Rachau

Director of Development
Chicago History Museum

With more than two decades of experience in database administration and prospect management, Eva has built a career helping nonprofit organizations strengthen fundraising operations through strategic data management and relationship-focused practices. Her expertise spans database implementation and optimization, data governance, moves management, reporting and analytics, and fundraising operations.



WHY THE FOUNDATION MATTERS



Strong fundraising isn't built on events or appeals alone.

Many nonprofits face common fundraising challenges. Donor information lives in spreadsheets, institutional knowledge resides with a single staff member or volunteer, follow-up efforts are inconsistent, and limited resources often lead to reactive rather than proactive fundraising.

Successful fundraising requires reliable systems, organized donor data, consistent processes, and meaningful stewardship. By establishing a strong foundation of people, processes, and technology, organizations can work more efficiently, strengthen donor relationships, and create long-term fundraising success without needing a large budget or staff.

SESSION OVERVIEW



Building a Strong Foundation for Sustainable Fundraising

Webinar Goals:

- Assess the effectiveness of your current fundraising infrastructure.
- Apply basic moves management principles to cultivate donor relationships.
- Design simple, repeatable fundraising workflows that support long-term growth.
- Prioritize improvements to strengthen fundraising capacity with limited resources.

AGENDA

01 Essential Systems & Tools

02 Donor Data & Relationship Management

03 Repeatable Fundraising Processes

04 Key Takeaways & Next Steps



ESSENTIAL SYSTEMS & TOOLS

1. CRM/Donor Database
2. Email Marketing Platform
3. Online Giving Platform
4. Event Management Tools
5. Research/Screening Software



YOUR CRM: THE HEART OF FUNDRAISING

- Who are our donors?
- How much have they given?
- When did we last engage them?
- What are they interested in?



RELATIONSHIP SUPPORTING TECHNOLOGY

Technology helps you:

- ✓ Stay organized
- ✓ Track engagement
- ✓ Personalize outreach
- ✓ Measure results



START WITH WHAT YOU HAVE

- Are we using our current tools effectively?
- Are records accurate?
- Is data entered consistently?
- Are reports being reviewed regularly?



DONOR DATA & RELATIONSHIP MANAGEMENT

1. Giving history
2. Attendance history
3. Volunteer involvement
4. Personal interests
5. Relationships and connections
6. Notes from interactions



KNOW YOUR DONORS

- Interests
- Affinities
- Capacity
- Engagement level



MOVES MANAGEMENT



- **Identify** – Find prospective supporters
- **Qualify** – Assess interest, connection, and capacity
- **Cultivate** – Build relationships and engagement
- **Solicit** – Make the ask
- **Steward** – Thank, report impact, and deepen involvement

EXAMPLE DONOR JOURNEY

1. Attends an event
2. Joins your mailing list
3. Makes a first gift
4. Meets leadership
5. Receives impact updates
6. Makes a larger gift
7. Becomes an advocate



WHAT SHOULD YOU TRACK?

- Last contact date
- Next action
- Solicitation status
- Event attendance
- Volunteer participation
- Giving trends



DONOR RETENTION STARTS WITH STEWARDSHIP

- Thank promptly
- Share impact
- Invite engagement
- Report outcomes



REPEATABLE FUNDRAISING PROCESSES

1. Consistency
2. Accountability
3. Efficiency
4. Scalability



BUILD REPEATABLE WORKFLOWS

- **Gift Processing**

Gift Received → Entered → Acknowledged → Reported

- **Event Follow-Up**

Attend → Thank → Survey → Invite Again

- **Major Donor Management**

Meeting → Notes → Next Steps → Follow-Up



THE FUNDRAISING CALENDAR

- Appeals
- Events
- Stewardship touchpoints
- Grant deadlines
- Board engagement



KEY TAKEAWAYS

- ✓ Reliable systems
- ✓ Organized donor data
- ✓ Intentional relationship management
- ✓ Repeatable processes
- ✓ Consistent stewardship



ONE THING YOU CAN DO THIS MONTH

- Clean donor records
- Create a stewardship plan
- Build a moves management pipeline
- Document a fundraising workflow
- Review your fundraising calendar



THANK YOU !



Q&A

