

10 practices for fundraising that is better rooted in strategy



- * Organizational strategy is key to successful fundraising work. Too often, we tend to forget this, which can cause a disconnect between our goals and our financial capabilities. Likewise, a lack of planning in fundraising can lead to lower efficiency, missed opportunities, and mission drift.



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Plan on all levels: Strategy, operations, finances



Fundraising is most effective when it is fully embedded in the organization's planning, rather than added on as a later step. This requires clarity about where you are heading and how it intends to get there. A multi-year strategic plan provides overall direction, annual plans and project plans translate priorities into concrete actions, scope, timing, and responsibilities. Financial planning is closely interlinked with all of these levels: budgets and cash-flow plans show what resources will be needed and when. When strategic, operational, project, and financial planning are aligned, fundraising becomes more focused, realistic, and coherent.



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**Answer the WHY first.
Then come the HOW and the WHAT.**



Strong fundraising starts with a deep connection to the problem you address. This means understanding its complexity, urgency, and ever-changing nature. Never assume that others automatically see these. Even if the issue feels obvious to you, it rarely is for donors, partners, or volunteers. The WHAT and the HOW (your programs, activities, and methodology) are usually easier to explain, but they are also less engaging. The WHY is what creates both emotional and intellectual connection. As someone involved in fundraising, you will need to tell that again and again: to individual donors, institutional funders, partners, and volunteers alike.



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Know your finances. Even at 3 AM.



Fundraising must be grounded in a solid understanding of your financial reality. This includes annual and project budgets, cash-flow plans, and longer-term financial commitments. It also means a clear view of investments, which may be necessary for growth: property, equipment, capacity-building, etc. Equally important is understanding your external financial environment and knowing who helps you think about money: this might be a finance manager, a board member with financial expertise, or a trusted volunteer.



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Scan your environment constantly.



Fundraising should not happen in a vacuum. A strategic approach to fundraising requires regular scanning of the external environment, using tools such as a PESTEL or a SWOT analysis. Policy changes, economic shifts, social trends, and developments within the nonprofit sector all influence what is possible and what is realistic. These data and information will help you understand where opportunities and risks lie, while awareness of other organizations working in the same field prevents duplication and enables better positioning. Knowing your environment allows you to align your fundraising strategy with broader trends; and to anticipate changes instead of constantly reacting to them.



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Think about capacity. A lot.



Capacity is something organizations tend to underestimate. Fundraising requires time, diverse skills, and efficient coordination – all of which need to be planned from the start. It is equally important to leave room for learning and for adjusting plans when things don't work out as expected. Beyond that, always be aware who is involved and how. Fundraising is not only the job of a fundraiser or grant writer; most of the time it will include the CEO, board members, finance staff, program staff, and sometimes volunteers. A key part of planning is therefore to clarify how these roles and units will work together, and how responsibilities and cooperation will be managed over time.



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Don't miss out on your board.



More precisely, don't let board members miss out on the organization. An engaged board is a fundraising board. This does not mean that every board member must actively ask for money, but it does mean that fundraising is understood as a shared responsibility. Changing board culture takes time – ideally, you start this shift with at least one committed board ally who models the behavior and supports change from within. It often helps to begin with small, concrete steps, such as encouraging board members to make their own contributions. For those who are unwilling or unable to fundraise directly, their role can be to open doors: making introductions, connecting you with potential donors, or acting as ambassadors for the organization. Additionally, being present in the fundraising work should be a criteria when recruiting new board members.



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Be aware of the cultural context.



Fundraising is always shaped by cultural context, both outside and inside the organization. In the external environment, this can include bias, suspicion, or low levels of trust toward nonprofit organizations, all of which influence how fundraising efforts are received and interpreted. Cultural factors also exist internally: discomfort, embarrassment, or emotional resistance around fundraising can affect staff, leaders, and board members alike. Addressing this requires awareness and ongoing learning, starting with yourself and extending to your team and immediate stakeholders. A strategic approach to fundraising also means being clear about what can be changed in the short term, what can only be influenced gradually, and what must be accepted as a given.



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Listen, listen, listen.



Listening is one of the most important skills in fundraising. Many donors (especially mid-level and major donors) value being heard and want space to talk about what matters to them. The more carefully you listen, the better you understand their motivations, expectations, and decision-making. The same principle applies to grant-makers. Thorough reading of guidelines, looking at previous grantees or publicly available successful grants, and (where possible) direct contact all help clarify a donor's priorities. Before investing significant time and energy, always assess whether these priorities truly align with the organization's strategy.



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Don't try to do everything at the same time.



Not every fundraising idea or new approach needs to be pursued immediately. There are always new, appealing fundraising tools, channels, and trends; but not all of them are right for every organization. A key question is whether the timing is right and whether both the organization and potential donors are truly ready. This includes having the necessary skills, people, processes, and systems in place to support that effort. Looking at what has worked in the past and what has not, provides important guidance. Simple analytical tools, such as a SWOT analysis, can help clarify readiness and focus. A strategic approach to fundraising is ultimately about making conscious choices: setting clear priorities and deliberately deciding what not to do.



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Measure the right things.



Measurement is essential for learning and improvement. Key indicators can include donor retention, conversion rates, return on investment, changes in the donor base, and upgrades or downgrades in giving. These metrics help you understand what is working and where adjustments are needed. At the same time, avoid getting lost in the numbers. Data should inform decisions, not distract from the fundraising work. Focus only on a few numbers, and keep measurement manageable so it guides action rather than creating unnecessary burden.



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Let's get in touch...



- ✧ if you would like to explore more
- ✧ if you need some extra guidance on aligning your fundraising work with your strategy
- ✧ if you wish to enhance any other aspect of your organizational strategy.

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