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Your Fall Fundraising Guide: 6 Steps To Make the Most Out of Fundraising's Most Fruitful Season

Welcome to Fall!

It's primetime fundraising season and typically a time to sprint towards your end of year goals. This time of year comes on the heels of what was (hopefully!) a more restful summer season— brimming with ideas, reflections, rest and goal-setting for the coming year.

And now it's time to activate!

What sometimes starts off as a light jog— slowly, but consistently, becomes a full on sprint towards the end of the year. During a time where there are many things flying our way—like conferences, speaking engagements, the start of the school year, grant notices and Fall board meetings— keeping your eye on the activities that will be key to your success is of highest priority.

Here is what some of my clients are doing and saying about their Fall right now!



"I'm prioritizing fitness and wellbeing so that I can be in the best shape possible for the stamina I will need to promote my book and hit the road!" ...Social Enterprise Leader

"I'm making sure EVERYONE knows about my fund! I'm talking to as many people as I can within the ecosystem to get them as excited as I am!" ... Fund Manager

"I'm starting the season on vacation! Taking this time to be thoughtful, rest and plan for a big season ahead"... Nonprofit Executive

I love their Fall goals! Communicating to internal and external stakeholders and keeping your mental and physical health strong for all that's to come, is exactly part of the game plan.

And there's more. Here are 6 activities that I would consider high priority for fundraisers, nonprofit leaders and fund managers for the

Fall, as you get organized, prioritize the multitude of tasks on your plate and work to successfully reach your targets

- **Clarify or Refine Financial Goals:** You have (or should have!) already defined your financial goals in past seasons, so this is a time to ensure that you are going to hit them or pivot your activities to reach greater success. Nonprofits: are you smooth sailing into your end of year general operations targets? Fund managers: Do you have a fourth quarter target for your fund? Now's the time to either think about how (or if) you will get your goals met or activate a change and do things differently.

- **CRM:** Make sure your CRM is organized! It's a good time to make any updates to your CRM, ensure it's up to date and begin working from it once again if you gave it some rest over the Summer. Is your list tiered to reflect priorities? Do you have notes from previous conversations where they may have given you a different time frame to reach back out? Make sure you are using it as an important guide to your work. (It often guides each meeting I have with my fundraising clients).

- **Marketing & Financial Materials:** Make sure you have an updated deck, one-pager (or 2 pager as I'm seeing more of) PPMs (for fund managers) and financials for all. Things move so quickly in this season while you meet

people and have a lot of external engagement. Take the time early in the season (like now!) to make sure these materials are up to date so you don't need to refine them when asked for them (One caveat, you will need to adapt your deck at times to speak more specifically to your prospect- but generally speaking make sure these docs are ready!)

- **Pitching:** If you took some time off over the Summer (and I hope you did!) You may have gotten just a little rusty on your pitching. But it's time to get back out there! Start with some of the friendliest contacts first and work your way to some of your lesser known, high stakes conversations. For example, if you have a choice between starting with your Board member's colleague who is excited to learn more about your Fund vs. the head of a major foundation you have been hoping to speak to for 2 years. Choose the board members' colleagues first!

- **Board Member and Ambassador**

Engagement: You'll want to have calls or meetings with your board and other ambassadors to activate them towards maximizing your fundraising work! (I wrote an article especially on engaging funders and ambassadors you can find [here](#)). Make sure they know about your goals and any new projects or updates about your organizations. Also make sure they have the latest decks, talking points and one pagers to share on your

behalf. Lastly, if they have already committed to helping in a more activated way, discuss what that looks like, whether they can join you on calls and meetings and whether they have any new prospects to add to your CRM.

- **Fall Event or Convening:** Last but not least is an opportunity to engage, socialize, thank, steward or meet current or future investors and funders. If you are having a Fall fundraiser or “friendraiser” chances are you began thinking about it earlier in the year, but if not, it’s still time to activate something small and impactful like a cocktail party or my new favorite, Coffee/lunch webinar, to gather your funder/investor community and get them excited about all that’s to come for your organization.

These are my tips for a successful season! Let me know what you would add and best of luck on your Fall sprint!

Alicia DeLia is CEO and Founder of Alicia DeLia Fundraising, LLC, an international fundraising firm that raises capital for social enterprises, nonprofits and impact funds. Her expertise as a fundraiser, economist and small business owner informs her work advocating and fundraising for social enterprise leaders in the US, Latin America and Africa to attract the capital they need to create, launch and scale their impact. To date, Alicia has raised over \$50 million dollars for the greater good. Alicia believes investments can be used as a tool to not just capitalize brilliant ideas, but to also heal and connect communities world-wide.