



APERIO
PHILANTHROPY

APERIO GUIDE

FUNDRAISER-EXECUTIVE PARTNERSHIP

One crucial ingredient in successful relationship-based fundraising is *executives' time*—one of the scarcest resources any nonprofit has. Philanthropists, business leaders, and foundation decision-makers *expect* to interact with top leadership. It's also critical for the nonprofit that each of those interactions be strategic and purposeful, so additional time is required for preparation.

The challenge is that nonprofit executives—CEOs, Executive Directors, CDOs, Directors of Development—are pulled in many directions. There's always an urgent need to meet, a fire to put out, an event to lead.

Donor relationships become the piece of fundraising that continually slips to the bottom of the to-do list. Thoughtful preparation for interactions, even lower.

The solution?

Partnership between the executive and fundraising staff to "**plan the work**" (map out next steps to move forward relationships and asks) and "**work the plan**" (take those planned steps).

This guide offers a practical framework for structuring the partnership.

- **If you're a fundraiser**, use this Aperio Guide as a framework for partnering with your leadership. Take the lead on setting up the meetings, prioritizing opportunities, preparing the materials, and keeping track of next steps.
- **If you're an executive**, use this Aperio Guide to communicate to fundraisers what effective "managing up" looks like. Share your dedication to participating in donor relationships, as well as any personal preferences your team should be aware of as they work with you on this effort.

The keys to success are:

- **Consistency**: don't let the meetings slide
- **Preparation**: pre-work by the fundraiser is essential
- **Prioritization**: focus on top prospects
- **Follow-through**: commit to taking the steps
- **Openness**: talk through challenges and opportunities together

Annual Plan

A series of conversations before the start of the fiscal year to develop a concrete, ambitious plan to achieve/exceed goals

1. Fundraiser completes stewardship plan and portfolio plan
2. Review meeting(s) with executive to generate additional ideas and strategies
3. Fundraiser revises plans
4. Review meeting with executive to finalize plan
5. Fundraiser ensure executive can easily access the plan

Monthly Plan

A monthly 1- to 3-hour deep-dive brainstorming session on the next asks and the next moves for top prospects in portfolio

1. Fundraiser selects 10-15 prospects from portfolio to discuss—prioritizing those due for an ask or move
2. Fundraiser does homework on the list (gathers potentially relevant materials about funding opportunities, requests prospect information via wealth screen, etc.)
3. Fundraiser develops thought-starter strategy, capturing ideas and moves management in CRM
4. Fundraiser brings report information pulled from CRM on those top 10-15 prospects from portfolio and all other relevant materials to meeting
5. Review meeting with executive to decide on a specific, meaningful, personalized next move for each prospect
6. Each month, refer to the to do list from the previous meeting and ensure all action items are completed and tracked in the CRM and added to this month's plan
7. Fundraiser sends executive a meeting recap and to do list with next steps for prospects

Weekly Check-In

A 30-minute weekly meeting to review upcoming tasks and asks and to follow up on outstanding to-do list

1. Throughout the week, in between these weekly meetings, Fundraiser compiles a running list of topics for discussion at next meeting
2. Prior to the meeting, fundraiser organizes an agenda: (1) What's a pressing topic this week? (2) Next moves managements and donor meetings to schedule (3) Next moves to advance key relationships
3. Fundraiser sends executive an agenda prior to the meeting
4. Fundraiser brings the agenda, computer or a printout report of prospects and donors that will be reviewed in the meeting, as well as any donor profiles of those that will be discussed
5. Check-in meeting(s) with executive to work through the agenda, which generates a to-do list with next steps for next week's meeting
6. Each week, refer to the to-do list from the previous meeting and ensure all action items and moves management are completed and track in CRM, and if not, add them to this week's plan
7. Fundraiser updates any meaningful interactions with prospect or donor in CRM
8. Fundraiser sends executive a meeting recap and the to-do list with next steps
9. Fundraiser tracks progress against monthly plan to make sure all action items and move managements are being completed

Making the Moves & Asks

A collaborative effort—organized and orchestrated by the fundraiser—to complete each week's to-do list

1. Fundraiser executes meaningful interactions—emails, phone calls, hand-written notes, meetings/visits
2. Fundraiser tees up and facilitates executive's meaningful interactions – emails, phone calls, hand-written notes, meetings/visits
3. Fundraiser tracks completion of to-do list and moves management in CRM and updates agenda for next weekly meeting