

Eskin Fundraising Training Presents Midyear Fundraising Tune-up

Ensure The Non-Profit Is Performing At Optimal Effectiveness And Cost Efficiency

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When most people hear the word 'tune-up,' they naturally think about automobiles, and probably that their own car is overdue. A car represents a major investment, and timely service and maintenance ensures the best return on that investment. Similarly, giving resource development operations a "fundraising tune-up" can significantly enhance efficiency and yield better results in achieving the non-profit's mission and impact.



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All for- and non-profit organizations will enormously benefit from similar tune-ups to ensure operations are performing at peak efficiency. We often hear that non-profits should model themselves more like businesses. Let's take that one step further: Non-profits that typically even in good times need to stretch nickels into dimes, have more motivation to make sure they are running as efficiently and cost-effectively as possible. There is little, if any, fat to trim.

The pressures to maintain and increase gift income mount as the need for programs, services and benefits escalate during times of inflation and challenging economic realities when more people are struggling.

Based on a fulfilling career leading advancement for three institutions of higher education, and over the past seven years leading more than 250 workshops, webinars, broadcasts podcasts and customized board training sessions, authoring two books and more than 150 guest columns and blogs, Eskin Fundraising Training has empowered non-profits of all different sizes, missions and parts of the country to replace fear of fundraising with comfort and confidence.

Here are 12 elements to consider for conducting a mid-year fundraising tune up to diagnose, make repairs and improvements that will drive up gift income that is so essential in carrying out noble missions that touch, improve and save more lives.

Assess Current Standing

1. Make a brutally honest assessment of where every part of the resource development program stands. What goals and objectives were set at the beginning of the year? As temperatures rise during the summer, how is the organization doing? Is it ahead, on or behind pace?

2. Engage as many members as possible of the non-profit family in these frank discussions. If the mindset is that resource development is solely the responsibility of the development staff, the non-profit is handcuffing itself and compromising its potential. All professional and volunteer team members of the non-profit can play a role, and this starts with contributing ideas and best thinking on where fundraising is succeeding and where there are opportunities for improvement.

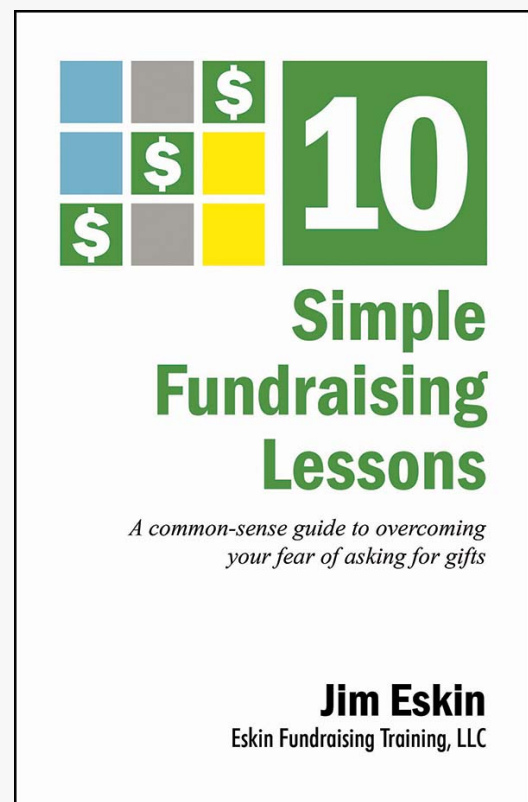
3. Be sure the assessment addresses the external environment. How is the local economy fairing? Have any major employers moved in or out of the community? How severe is the impact of the changing political environment? How visible and positive is the perception of the nonprofit's leadership?

Evaluate The Approach

4. How strong is the understanding of the motivations of donors? The fundraising tune-up needs to feature private conversations with leading donors on what they believe provides the greatest satisfaction from gifts of time, talent and treasure. What satisfaction from gifts made to other good causes that haven't received enough attention from the non-profit?



Jim Eskin, Founder, Eskin Fundraising Training, LLC



10 Simple Fundraising Lessons

5. Communications and fundraising are seamless. In other words, it's impossible to tell where one ends and the other begins. The good news is that communications has never offered so many channels and tools to connect with donors and prospects. The challenge is to most effectively integrate all of the different communications outreach so that they truly reinforce each other. The first step is spending enough time to precisely pinpoint the three most essential messages. Then make sure that print, electronic and digital media efforts are relentlessly pounding those messages home.

6. Consistently over the last several decades years two-thirds of private gift dollars have come from individuals. When you add bequests and gifts from family foundations to individuals, this share of the pie is closer to 90% of the philanthropic pie. By all means, welcome gifts from corporations and foundations, but prospect lists must emphasize individuals, because in the words of the infamous bank robber Willie Sutton: "That's where the money is."

Cultivate and Steward Donors

7. The fundraising environment is increasingly dependent on major gifts as fewer and fewer donors are making larger and larger gifts. Keep the prospect list of major gift donors front and center every day of the week. Are they receiving priority cultivation? If not, identify the bottlenecks. The larger the gift target the more challenging it is to get on the prospect's schedule. Quality interaction is at a premium as money follows time. Is the major gift prospect list missing potential individuals, corporations and foundations? The Six Degrees of Separation reminds us that everyone on the planet is separated by no more than six personal relationships. Take full advantage of doors that can be opened by

HOW TO SCORE
Your First
OR NEXT
Million-Dollar Gift



Jim Eskin

Eskin Fundraising Training, LLC

How To Score Your First or Next Million-Dollar Gift

**NON
PROFIT
STRONG®**

The non-profit sector has men, women and youth who are ready to lead

staff — both fundraising and programmatic — board members, volunteers and donors. A fundraising tune-up can help assess if major gift prospects are receiving proper priority and cultivation.

8. It is amazing how often this simple truth is overlooked: Every donor prospect must be asked for a specific amount, for a specific purpose and to be paid by a specific time. The more that is solicited — especially in face-to-face meetings — the more money will be raised. There is no precise formula on the duration of the cultivation period, other than that the greater the desired gift the more cultivation is necessary. Sometimes the cultivation phase — forging a personal and emotional alignment between the non-profit's mission, vision and values and the donor prospect's philanthropic priorities can be completed in months if there is enough quality interaction. For major gifts, this may take a year or more. But no organization should delay the ask one day more than is absolutely essential. Remember that the donor prospect is likely being cultivated by other deserving non-profits championing admirable causes.

9. The most likely major gifts will come from the current donor base. Is the stewardship program genuinely and robustly acknowledging and thanking people for gifts of time and money? This can take a wide range of forms from intimate recognition events to much larger public events. Stewardship should be carefully designed with the donor's personality in mind. The deepest concern for the vast majority of donors is understanding how gift dollars are making a difference. New technology is providing more and more effective strategies such as impact videos. Never underestimate the power of donors personally interacting with the beneficiaries of their generosity. In higher education, this power is evident when donors meet with scholarship recipients. Study the retention rate to keep donors and encourage repeat, and potentially larger, gifts each year. This sharpens a fundraising tune-up and proves more cost-effective by retaining a current donor base instead of solely focusing on acquiring new ones.

Implement Improvements

10. Are all outreach channels emphasizing new and popular ways of giving? Donor advised funds (DAFs) have emerged as the most dynamic component of American philanthropy. DAF holders grant about \$55 billion a year to a wide range of charitable causes. The website, marketing material and especially solicitation activities should inquire about opportunities to give through DAFs.

11. People can make gifts several times larger through their estates than through wealth. Be sure to discuss the wide range of options from charitable bequests, retirement funds, insurance policies, gifts of stock and other assets.

12. Celebrate victories. Recognize the roles played by everyone in the discovery, cultivation, solicitation and stewardship of gifts. They don't come easily, especially major gifts. Let everyone know that they are directly contributing to the power of the mission to advance good works.

This list, by no means, is all-inclusive. No doubt, there are other components to assess, analyze

and upgrade the caliber of the resource development program. Final word: Don't be afraid to make changes. Keep to sound fundraising principles and best practices but take full advantage to adjust strategies as circumstances warrant. The non-profit needs to be operating at peak performance as the later stages of the year approach when most gift income is raised.

About Eskin Fundraising Training

After a successful career leading advancement for three institutions of higher education, Jim Eskin's consulting practice, Eskin Fundraising Training, launched in 2018, builds on the success of more than 250 fundraising workshops, webinars, webcasts, podcasts and board sessions, and provides the training, coaching and support services to equip non-profit leaders to replace fear of fundraising with comfort and confidence. He has authored more than 150 guest columns that have appeared in daily newspapers, business journals and blogs across the country. He publishes Stratagem, a monthly e-newsletter exploring timely issues and trends in philanthropy. [Sign up here for a free subscription.](#) You will also receive invitations to free virtual learning community programs. He is author of [10 Simple Fundraising Lessons](#), an 82-page common sense guide to understanding the art and science of fundraising, and [How to Score Your First or Next Million-Dollar Gift](#), 104 pages filled with strategies, best practices and homework assignments to unlock exciting opportunities that elevate organizational impact to the next level. Both are available in print and digital formats through Pathway, the book distributor, and Amazon. Quantity discounts are available to non-profits who want to share books with teams of management, development staff, board and volunteers. Eskin is also available for customized virtual training for boards, staff, and fundraising committees. His newest customized service, Fundraising Urgent Care, offers 48-hour turnaround in addressing general strategy and tactical challenges that require immediate responses.

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