

# Index

- Activating donors, 44, 45  
  process of, 45, 46
- Agreements. *See also* Gift acceptance policies  
  binding, 103  
  curation, 107  
  for collections, 107  
  purposes of, 107
- Annual fund, 89  
  hospitals, 175
- Arts organizations. *See also* Cultural organizations  
  fundraising methods, 163, 164  
  use of volunteers, 157, 164  
  value demonstration by, 163, 164
- Assets. *See also* Collections Conservation easements Life insurance Nontraditional assets Real estate Securities Tangible personal property  
  noncash, 157
- Boards of directors, 164
- Boards of trustees  
  hospitals, 171  
  members as fundraisers, 171
- Campaign  
  disadvantages of entering, 10  
  entry, advantages and disadvantages of, 5  
  including volunteers in development process, 10  
  participation from all levels of institutional leadership, 10  
  positive, empowering process, for charity, 11  
  raising donors' sights, and gift amounts, 6  
  ramping up for, 10  
  Volunteers  
    increased management of, 10
- Campaign counsel  
  campaign consultants  
    in planned giving, 5  
  development office's, institutional leadership, 4  
  development staff, for campaigns, 4  
  development staff, raising money, 5  
  fundraising consultants, hiring of, 4  
  raising philanthropic dollars, 4  
  speaking for, senior leadership, 4  
  steps to take, in campaign entry, 4
- Campaign gifts  
  charged or surcharged, 191
- Campaign planning  
  access to outside, planned giving office, 5  
  additional philanthropy  
    organization transformation, 6  
  garnering financial support  
    and public visibility, 5
- Campaigns  
  annual fund dollars, increase in, 8  
  Budget/cost, 11  
  campaign counsel, 11  
  failed campaign, 11  
  for specific programs, 4  
  impeccable campaign planning, 11  
  public failure, 11  
  raising funds  
    branding, marketing, and public relations, 4  
    senior leadership, 11
- Capital campaigns  
  donor's remorse and, 101, 102  
  faith based and religious organizations, 157
- Celebrities, 163
- Cell phone usage, 76
- Chairperson, 90, 91  
  characteristics of, 90  
  time commitment, 91
- Charitable giving, 45

## INDEX

- Charities, 121  
allocation of, discretionary budgetary allotments, 184  
and operational cost increases, 136  
and staff members, 121  
resources, allocation of, 121  
assessing complacency, steps in, 116  
best practices, requiring full disclosure, 191  
brochures, preparation of, 118  
concept of donors' rights, 191  
cultivational plan, to promote activity and contact, 118  
disclosing of, surcharge, 191  
donor base of, 123  
expenses and administrative and worthy fundraising objectives, 184  
expenses, struggling and juggling to meet, 183  
generating income, methods of, 192  
important objectives, in convincing donors, 191  
increased interest, for cost of operations, 184  
literature, assessment of, 118  
overcoming donors, 114, 120  
securing needed funds, common method of, 185  
small contributors' donations, 120  
traditional giving patterns of, 192
- Charities and organizations  
traditional giving patterns, evaluation of, 192
- Charity  
accessing donor gifts  
for overhead organizational budgets, 185  
funding cost of, 183  
impact on, 183, 185  
implications and considerations, in accessing gift revenue, 184
- Charity and donor base  
donor disconnects, 116
- Charity software, measuring contacts, 118
- Chief development officer (CDO)  
role of, 97, 98
- Chief executive officer (CEO), 44
- Citizenship, 162
- Civic organizations, 162, 163
- Collections  
acceptance/curation agreement, 107  
return of, 107
- Constituents. *See also* Donors Prospects  
cultivating, 157
- Consultant, evaluation of charity's efforts, 119
- Cultural organizations. *See also* Arts organizations  
fundraising methods, 163, 164  
use of volunteers, 164  
value demonstration by, 163, 164
- Delay, as cause for gift rescission, 104
- Department heads  
frustration in, siphoning percentage of gift, 185
- Development office  
additional skills, leadership in, 27  
boss as mentor, 26  
chief development officers, 16  
development programs  
changing from, average to good program, 15  
leadership, type of, 16  
new campaign, succession of, 15  
good management and leadership, 27  
leadership characteristics, 19  
managers and leaders, 16, 21  
star leaders, leadership rules to live by, 23
- Development office staff, 71
- Development officer  
cell phone usage, 76  
fundraising, 75  
overnight stay at donor's home, 77  
paying donor's food or restaurant bill, 76  
restaurant protocol, 77  
seeing new donors, good time to exit, 70  
telephone etiquette, while placing call to donor, 72  
time to exit, when others join conversation, 70  
use of, 73  
visiting donors, 78
- Development offices  
evaluation of, 155  
hospitals, 169, 174, 175

## INDEX

- Development professional
  - planned giving or development officer
    - interactions with donors, 68
- Development professional; giving or development officer; for officers, to evaluate their own skills, 8
- Development professionals
  - leading or managing, team of fundraisers, 16
  - staff support, 18
- Development program
  - president, trustees, vice presidents, deans, 10
  - scrutiny of, 10
  - vice president open to
    - new level of scrutiny, 10
- Development programs, learning from other organizations, 155, 165
- Development staff
  - creating campaign planning groups, 11
  - hiring of, 10
  - impact on, 186
  - long-term members, resenting changes in policy, 186
  - Planning Distractions
    - meeting with, campaign counsel, senior leadership, trustees, 11
- Development teams, 16
- Donor
  - choosing a trustee solicitor, 35
  - flattering the, 35
  - negotiations and discussions with, 75
  - restricted gifts
    - with limitation or restriction attached, 185
  - right gift option for, 35
  - visits, 75
- Donor Base
  - diverting percentage of gift and underwriting cost of development, 186
  - impact on, 186
- Donor complaints, dealing with, 73
- Donor fatigue
  - charities
    - fixing disconnects, problem of, 119
    - task force, creation of, 117
  - combating of, 114
  - donor base, 115
  - declining participation, percentage of, 115
- Donor's remorse, 101, 112
  - causes of, 103, 106
  - effects of, 102, 103
  - family role in, 108
  - form of gift, 106
  - multiyear pledges, 105
  - preventing, 106, 111
  - public relations problems from, 102
  - response to, 111, 112
  - staff changes and, 103
  - suit to enforce pledge, 103
  - terms of gift, 106
  - withholding funding for protest, 102
- Donors. *See also* Family philanthropy
- Prospects
  - and charity
    - measuring activity between, 118
    - value relationship with, 123
  - and signed gifts agreements, 136
  - appreciated securities, gifts of, 122
  - as decision makers, 105
  - as insiders, 162
  - assessing contacts with, 117
  - attractive gift options to, 120
  - build with advisors
    - relationships, 33
  - charitable efforts, in disaster relief, 114
  - charitable gift guides or brochures, 117
  - competing interests, 105
  - demonstrating malaise, in personal philanthropy, 115
  - do not invest in project
    - not clearly thought out or articulated, 34
  - gifts of, real estate, 122
  - individual, 176
  - interests, 105
  - life income gifts, 8
  - making both, restricted and unrestricted gifts, 8
  - maintaining contact with, 108
  - objectives, responding to, 191
  - patients as, 159, 177--179
  - phonathons, less enthusiasm in, 115
  - qualifying capacity to make gift, 104
  - remorse. *See also* Donor's remorse, 112
  - treated well by organization, 33
  - understanding and appreciating role of development and administration, 187

## INDEX



- Donors and prospects
  - department, greater allegiance to, 186
- Donors/prospects, 73
  - appointments, setting and confirming of, 72
  - difficulty, dealing with, 74
- Donors/prospects calls on, development officer, 71
- E-mail etiquette in, 73
- Education of public re mission, 165
- Educational institutions
  - fundraising methods, 160, 161
  - volunteer use, 160, 161
- Educational institutions, alumni relations, representative from, 117
- Employees
  - nondevelopment staff, 156, 159, 161
- Endowed fund
  - scholarship, beneficiary—the scholarship recipient, 190
- Endowed fund minimums, 127, 137
  - for scholarships, 130
    - funding formula, 131
  - funding of, 129
  - in hospitals, 131
  - inconsistency pricing policy, 129
  - pegging based on good or service/formulaic approaches, 130
  - pegging based on realistic costs, 132
  - political fallout, 135, 137
  - provisions for updation of, 134
  - realistic setting of, 132
  - strategy to sell concept, 135
  - uniformity of, 129
- Endowed fund minimums private colleges and universities realistic minimums at, 134
- Endowed fund minimums private colleges and universities typical minimums at, 134
- Endowed fund minimums public colleges and universities realistic minimums at, 133
- Endowed fund minimums public colleges and universities typical minimums at, 133
- Endowed fund schedule, 130
- Endowed funds
  - administrative fees, increasing of, 188
  - charity's current minimums for, 130
  - donor-sponsored, 127
  - traditional giving patterns
    - imposing surcharge, and increasing management fee, 188
  - type of, in Nonprofit organization, 130
- Entrepreneur
  - operational expenses, partially underwriting, 187
- Entrepreneurial donors
  - fundraising or operations underwriting cost of, 187
- Ex officio directors, 92
- Faith based organizations
  - fundraising development and strengths, 157, 158
  - network use by, 157
- Family dynamics
  - and gift rescission, 108
- Family squabbles
  - planned giving officer, 80
- Financial reversals for donor, 104
- Focus groups
  - assessing of, 119
  - charity types, 119
  - self philanthropy, and perceptions of, 119
- Form of gift, 106
- Fundraisers
  - complex charities, 33
  - good listener, 75
  - raising money, by getting out of the office and asking for it, 34
  - working the gift through the charity, 33
  - soliciting gifts, 34
- Fundraising, 42, 83
  - ambassador model of, 158
  - checklists for applicability of methods, 157, 166
  - donor motivation, 35
  - donor's
    - support for charity, 35
  - finding cost of, 184
  - from nonprofit's perspective, 43, 44
  - learning from other organizations
    - about, 155, 165
  - political, 161, 162
  - professionalization of, 161
- Fundraising campaign
  - cohesive volunteer, and leadership effort, 12
  - creating institutional awareness

## INDEX

- and public relations, marketing, 6
- disadvantages of, 12
- for motivating staff, 8
- increased costs and risk of failure/unmet needs, 12
- increased productivity and increased funding, 12
- increasing productivity, 8
- increasing, nonprofit's philanthropic dollars, 6
- individuals and entities, bringing together, 3
- initial considerations for, entering, 4
- Multiple considerations for entering campaigns, 11
- nonprofit leadership, priority funding needs and areas, 8
- planned giving staff
  - and transformational gifts, 8
  - raising of, outright cash gifts and planned gifts, 8
- rallying of
  - internal, external, and volunteer leadership, 6
- strategic plan
  - bringing supporters, prospects, and donors together, 6
  - staff accountability, 12
- Fundraising program, exemplary management and leadership, 16
- Fundraising strategist
  - appropriate strategic path, working with, 24
  - financial goal, raised each year, 24
- Gift acceptance policies
  - restating gift terms, 106, 107
- Gift clubs, 49, 50
- Gift revenue
  - accessing of, 184
- Gifts, planned. *See also* Major gifts Planned giving programs
  - confirmation of, 107
  - form changes, 106
- Give or get strategy, 162
- Good management, tools, 25
- Health Insurance Portability and Accountability Act (HIPAA) of 1996, 179
- Healthcare organizations
  - community relations, 164
  - fundraising methods, 158, 160
  - partnership with nondevelopment staff members, 156, 161
- HIPAA (Health Insurance Portability and Accountability Act), 179
- Hospital fundraising, 167, 179
  - administrators, 172
  - advisory boards/councils, 173
  - allocation of gifts, 179
  - annual fund, 175
  - board of trustees, 171
  - business offices and personnel, 173
  - competition with other nonprofits, 177
  - development staff, 171, 174
  - expectations re, 176
  - leadership involvement, 171
  - participants in, 171
  - patients as donors, 159, 172, 176, 177, 179
  - physician involvement, 170, 173, 176, 177
  - planned giving/development offices, 169, 174, 175
  - president, 171, 172
  - priorities, 175, 177
  - unique nature of, 167
  - volunteers, 173
- Hospitals. *See also* Healthcare organizations
  - community hospitals, 169
  - environment, 168, 171
  - fundraising by, 158, 160, 167, 179
  - need for philanthropy, 169
  - partnership with nondevelopment staff members, 159
  - teaching hospitals, 168
- Human resources department, 26
- Humanitarian organizations, 165
- Installments on multiyear gifts, 106
- Institutional campaign
  - entering a campaign, 9
  - focusing staff on accountability and teamwork, 9
  - individual team members' responsibilities, defining of roles, 9
  - keeping nonprofits competitive, 9
- Institutional or organizational insiders
  - charity's operational expenses tapping for funds, 187

## INDEX

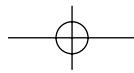
- International and national disaster relief, 114
- International events
  - hurricanes, Katrina and Rita, 113
  - tsunami and earthquakes, 114
- International philanthropy, 89
- Key donors
  - educating, budget and value of operations, 187
- Leadership
  - development, 19
  - development department, engaging in, 19
  - fundraising, 19
  - good leaders, positive approach of, 19
- Leadership gifts
  - donor's remorse and, 102
- Making investments, 11
- Management and leadership, books on, 26
- Management skills
  - donors, cultivating, soliciting, and stewarding, 16
  - philanthropic gifts, 16
- Managers and leaders
  - creating environments for, employee success, 21
  - educational methods for betterment, 27
  - feedback on performance, 24
  - good leaders, 22
  - managing up, 22
  - successful people, top characteristics of, 18
- Minimum gift thresholds
  - implications on, 190
- Named endowed funds, 123
- Noncash assets
  - funded gifts
    - challenging to access, 189
    - personal property, gifts of tangible property, 190
- Nondevelopment professionals
  - skill and ability involved in soliciting gifts
    - underestimate, 33
- Nonprofit fundraising campaign
  - creating institutional goals, 7
  - rotating scholars' program
    - globalization, or teaching courses on, 7
- Nonprofit organization, 10
  - by intelligent campaign counsel, 10
  - campaign buzz
    - completing successful campaigns, 9
  - in planned giving, 9
  - retaining good staff, 9
  - setting of realistic minimums, 134
  - solid, strategic thinking, 10
- Nonprofit organizations, 55, 82
  - campaign entry, 3
  - campaign preparation
    - reaching articulated goals, 4
  - campaigns
    - bringing nonprofit attention, and added awareness, 6
  - fundraising consultants, for moving campaigns, 4
  - increased marketing, and planned giving options, 6
  - philanthropic dollars
    - increased unrestricted support, 8
  - planned giving publications, a new look, 6
  - president's council, 82
  - problem situations, 56
  - problematic gift situations, 57, 62
  - staff members, 55
  - walk away, 63, 64
- Nonprofit organizations, donor fatigue, 113
- Nonprofit policy
  - affecting donors' gifts, 184
- Nonprofit's literature, 47
- Organization modelling, 88, 90
- Organizational budgets
  - augmenting of, 185
- Overhead costs, 173
- Performance measurements, 24
- Performance problems, dealing quickly, and efficiently, 20
- Personal coaches, instrumental in, 23
- Personal contact, 161
- Philanthropy. *See also* Family philanthropy; Planned giving, 41, 87
  - activating donors, 44, 45
  - and educational organizations, 51, 52
  - graduations, 51

## INDEX

- reunions, 52
- and healthcare organizations, 51
- arts and cultural organizations, 50
- charitable gifts, 41
- committee and board meetings, 48
- definition of, 42
- development to advancement, 43
- fundraising, 42
- gift clubs, 49, 50
- nonprofit organizations contributions to, 156, 157
- presidential and administrative  
  communiqués, 48
- promotion of, 44
- provides the educator, curator,  
  physician, or researcher  
  understanding the institution, 36
- public relations, 47, 48
- recognition programs, 49
- stewardship programs, 50
- strategies for promotion of, 46, 50
  - activities, 48
  - nonprofit's literature, 47
  - programs, 48
  - public events, 48
  - retreats, 48
- time donation as, 163
- Planned gift options
  - implications on, 190
- Planned gifts
  - and life income gifts, surcharges on, 189
  - surcharges imposed on, 189
- Planned giving
  - life income gifts, 122
  - role of, 124
- Planned giving director
  - people's strengths, paying attention to, 21
  - staffing, paying attention to, 20
  - steady, and forward thinking assistants, 21
  - successful solicitors or technicians, 16
- Planned giving donors
  - closing large planned gifts
    - top 10 list for, 32
- Planned giving officer
  - entrepreneurial spirit, 31
  - making gift tax-wise, 31
  - flexibility, 34
  - integrity
    - a high level of, 32
    - own donor base, 30
  - planned giving donor
    - find, cultivate, solicit, and steward, 30
  - principal gift officer
    - managing vast number of professionals, 31
  - tax implications and advantages and disadvantages of
    - planned gift versus another, 32
  - team oriented and independent, 30
  - types of roles, 30
- Planned giving officers, 29, 68, 79
  - acting as high-level advisors, 30
  - a third wheel, 79
  - build genuine relationships, 33
  - communicate the message, 34
  - finely tuned people skills, 32
  - fundraising etiquettes of, 69, 141
  - fundraising events, 69
  - gift calculations, 75
  - handling telephone calls, 70
  - hospitals, 169, 174, 175
  - love of Mission, 33
  - programmatic beneficiary changing quickly, 34
  - raise charitable funds for a nonprofit, 33
  - raising funds for, nonprofit organizations, 29
  - technical understanding, 31
  - work with prospects and donors
    - to close planned gifts, 32
  - working a room, 70
- Planned giving options
  - solution to, donor's question of how best make the gift, 31
- Planned giving program
  - chief development officer, 18
  - new gift options, 16
- Political fundraising, 161, 162
- President's society
  - definition of, 85
  - fund, creation of, 95, 97
  - goals of, 87, 88
  - rationale for creation of, 83, 85
    - board of trustees, 84
    - capital projects, funding for, 83
    - change in leadership, 83
    - new campaign, start of, 83
    - staff driven program, 84
  - staffing a new chair, 91

## INDEX

- President's society (*contd.*)  
    timeline for creation, 98  
    vs. board of trustees, 99
- Presidential and administrative  
    communiqués, 48
- Proactive program, educating public,  
    123
- Problematic gift situations  
    remedies for, 63  
    types of, 57, 62  
        asset real estate, 61, 62  
        donor, 57  
        restricted stock, 61, 62  
        self-interest, 59  
        tangible personal property, 61, 62  
        third party, 59  
    warning signs, 62, 63
- Professional advisors. *See also* Personal  
    representatives  
        advising against gift making,  
        103
- Professional fundraisers, 161
- Professional organization  
    advice and job networking, 36  
    basic tenets of professionalism  
        being entrepreneurial, 36  
        being team oriented, 36  
    charitable remainder trust, 36  
    communicate the message, 36  
    network of colleagues, 36  
    team skills, 36
- Progress, lack of, 104
- Public campaign  
    for successful campaigns, 7  
    liaisons or ambassadors for  
        nonprofit, 7  
    planned giving councils,  
        creating, 7
- Public relations, 47, 48
- Real estate  
    and tangible personal property  
        noncash assets, gifts funded with,  
        190
- Relationships between donors and  
    organizations,  
        after solicitation/pledge, 104  
        alienation, 102  
        nurturing, 103  
        problems in, 103
- Restricted gifts  
    surcharges imposed on, 189  
    types of disclosure, 189
- Service business and donor  
    issues/complaints, 73
- Single illness organizations, 164,  
    165
- Small nonprofit organizations  
    fundraising staff, short of, 192
- Social service organizations, 165
- Society  
    profile of, 92
- Society directors, 88, 92  
    selection of, 92, 93
- Solicitations  
    cultivating prospects, 110  
    following up, 108  
    of patients, 178  
    peer group, 157, 159  
    personal contact in, 161  
    physicians role, 172, 178
- Staff driven program, 84
- Stock markets, underperformance of  
    donors, 122
- Subcommittees, 82, 93
- Surcharges  
    meeting, and seeking assistance from  
        insiders or entrepreneurs, 188
- Task force  
    charity's public image, improving and  
        enhancing of, 117  
    comprising, charity's departments of  
        communications, development, public  
        relations, 117
- Terms of gift, restating, 106, 107
- Unrestricted gifts to charity, 8
- Volunteer society, 83  
    benefits of creation, 85, 87  
    community ambassadors, 87  
    creation of, 98, 99  
    engaging development staff,  
        86  
    engaging organizational leadership,  
        86  
    philanthropy, 87  
    programmatic enhancements, 86
- Volunteers  
    arts and cultural organizations, 163, 164



## INDEX

- boards of, 173
- choosing right
  - to solicit and steward gift, 35
- development of, 164
- educational institutions, 161
- faith based and religious organizations,  
157
- hospitals, 159, 173
- managing a group, 10
- World events
  - philanthropic objectives, influence of,  
119

