

Index

• Numerics •

- 501(c)(3) organization, 17–18
- 501(c)(4) organization, 17

• A •

- AAFRC (American Association of Fundraising Counsel), 14, 26
- Active Giving, 250
- addresses of people you know, acquiring
 - e-mail, 253
- administration of endowments, 335–336
- affinity groups, 85
- affinity programs, 271–272
- agendas for board meetings, 60
- AHP (Association for Healthcare Philanthropy), 26
- annual campaign, 82
- annual fund drive
 - approaches for, 279–282
 - brochures used in, 284
 - capital campaign run at same time as, 87–88
 - case statement used in, 284
 - described, 13, 275–276
 - design for, 276–283
 - direct mail approach for, 281
 - donor information sheets used in, 284
 - door-to-door approach for, 281
 - e-mail as approach for, 280–281
 - evaluation of, 285
 - face-to-face approach for, 279–280
 - goals for, 277–278
 - materials for, choosing, 284–285
 - online contacts as approach for, 280–281
 - personal calls as approach for, 280
 - personal correspondence as approach for, 280
 - planning for, 283–284
 - pledge cards used in, 284
 - radio approach for, 282
 - rating your organization's skills in, 282–283
 - research for, 283–284
 - special events as approach for, 281
 - team leader for, 278
 - team used to work on, 278–279
 - telemarketing approach for, 281–282
 - television approach for, 282
- annual reports, 159–160, 311
- annuities as instrument for planned gifts, 317
- anonymous donors, 30
- asking for donations
 - in direct mail, 169
 - in e-mail, 254–255
 - on Web sites for fundraising, 249
- asking for major gift
 - attitudes about money, being aware of your, 139–142
 - closing period for, 149
 - described, 129
 - donor, knowledge of, 147
 - engaging donor while, 148
 - equitable exchange, recognition of, 146
 - fear of asking for money, 137–139
 - following up to, 152
 - involvement, asking for, 149
 - less-than-perfect calls, 151
 - major giver as one who is, 145
 - “no” response to, 150–151
 - opening for, 148
 - peer-to-peer relationship and, 143
 - process of, 146–149
 - role-playing used to practice for, 144
 - solo fundraising calls, 145
 - steps for, 147–149
 - storytelling period while, 149
 - success in, rating your, 151–152
 - team used in fundraising calls, 143–144
 - tips for, 138
 - toolkit for, 146–147
 - who should ask, 142–145

Association for Healthcare Philanthropy (AHP), 26
 attendance at meetings of board members, 66
 attitudes
 about money, being aware of your, 139–142
 toward volunteers, quiz on, 68–71
 awareness raised by special events, 288

• B •

Bebak, Al (*Creating Web Pages For Dummies*), 244
 belief in your cause, 227
 block grant, 174
 blogs, 263–265
 board meetings
 agendas, setting, 60
 attendance at meetings of board members, 66
 brainstorming in, 60
 communication in, 60
 competing nonprofit, bringing in CEO from, 60
 questions asked during, 60
 running, 59–60
 board members
 accountability, setting up systems of, 61
 attendance at meetings of, 66
 bad practices of, 66
 community interaction, 57, 58–59
 confidence and high-end donors, 133
 contributions by individual, 61
 described, 55–56
 diversity in, 62
 donors, role in finding, 103–106
 executive director, 61, 66
 expectations for, setting, 64–65
 fundraising, 61
 grant proposals, role in preparing, 178
 growth and vision, 57, 60–61
 inspiration and, 56
 as lead gift givers in capital campaign, 304
 legal responsibilities of, 57, 58
 meetings, running, 59–60
 micromanagement and, 66
 moral and ethical issues, 59
 new members, training and educating, 56
 old issues rehashed at meetings, 66

organization governance, 57, 58
 and planned gifts, 316
 profiling ideal board member, 62
 prospective board members, 56, 65
 recruiting, 62–65
 relationship to, 56
 reputation of, 58
 responsibilities of, 57–61
 retreat for, 66–68
 roles filled by, 64
 sharing fundraising with, 56
 size of board, 63
 as stakeholders, 98
 successful board, building, 64
 volunteer group, helping to build, 72
 branding
 online branding, 263–272
 special events, 295
 bricks-and-mortar capital campaign, 298–299
 brochures, 158, 284
 budget for fundraising plan
 categories in, 89
 described, 88–89
 drafting, 89
 Form 990 and, 89
 fundraising software, 92–93
 hiring and, 90–92
 outsourcing and, 90–92
 overhead costs, 90
 staffing and, 90–92

• C •

capital campaign
 annual fund run at same time as, 87–88
 board members as lead gift givers, 304
 bricks-and-mortar capital campaign, 298–299
 challenge gifts, 304
 characteristics of, 298
 combined campaign, 299–300
 committee for, selection of, 300
 debriefing committees after, 306
 described, 297–298
 endowment campaign, 299
 evaluating, 306
 feasibility study used to help determine if you are ready for, 302

- following up with, 305–306
- Gift Range Chart, 81, 303
- goals for, 302–303
- grants for, 177
- high-level donors as lead gift givers, 304
- lead gift, 13, 303–304
- planning for, 301–306
- project campaign, 299
- public fundraising, 304–305
- readiness for, testing for, 301–302
- stages in, 301
- stakeholders in business and philanthropy as lead gift givers, 304
- tracking campaign related information, 111
- types of, 298
- CARE (Charity, Aid, Recovery, and Empowerment Act), 119–120
- CASE (Council for Advancement and Support of Education), 25
- case statement
 - accuracy of, 48
 - already-published information, use of, 52
 - annual fund drive, used in, 284
 - charts used in, 53
 - clarity in, 47
 - completeness of, 48
 - consistency in message and, 34
 - described, 33–34
 - development director, 38
 - development plan, 46
 - effect of, 34
 - evaluating, 49–50
 - FAQs, 35–36
 - finance section of, 44–45
 - first draft of, 36
 - focus groups, use of, 51–52
 - fundraising plan, as first item in, 77
 - goals of organization and, 39–40
 - governance section of, 42–43
 - and grant proposals, 181
 - headlines used in, 53
 - history of organization, 46–47
 - images in readers' minds, creating, 48
 - IRS ruling and, 36
 - joining with cause, including ways reader is able to, 48
 - language used in, 50
 - length of, 35
 - location section of, 44
 - mission statement, 37–39
 - objectives of organization and, 40–42
 - overstating, importance of not, 48
 - printing, 53
 - programs section of, 42
 - research and, 48
 - reviewing, 48–49
 - revising, 35, 48–49
 - staff section of, 43
 - stakeholders, testing ideas with, 49
 - steps in creating, 36–47
 - stories in, 48
 - summarization in, 48
 - testing ideas in, 50–52
 - typeface used in, 53
 - urgency of, 47
 - as video, 35–36
 - visual aids in, 35
 - Web availability of your, 36
 - who should write, 35
 - writing, 36–49
- cause-related major gifts, 310
- cause-related marketing, 101
- celebrity chats, 296
- cellphones and telephone solicitation, 215
- challenge gifts, 304
- challenge grants
 - corporations and, 321
 - deadlines for, 322
 - described, 174, 319–320
 - foundations and, 321
 - high-end donors and, 133–134
 - mechanics of, 321
 - positive aspects of, 320
 - proposal for, 321–322
- charitable lead trust, 317
- charitable remainder trust, 317
- Charity, Aid, Recovery, and Empowerment Act (CARE), 119–120
- Charity Channel, 269
- charity portals and malls
 - described, 265
 - entering, 266
 - PayPal used in, 267
 - shopping at, 266–267
- chat groups, 271
- combined campaign, 299–300

- commercial ventures, conversion of
 - nonprofits into, 345
 - commercialization of nonprofits, 344–345
 - committees
 - for capital campaign, selection of, 300
 - debriefing committees after capital campaign, 306
 - development committee, 63
 - executive committee, 63
 - finance committee, 63
 - governance committee, 63
 - nominating committee, 63
 - for planned gifts, 315
 - program committee, 63
 - public relations committee, 63
 - Commonfund, 337
 - community foundations as source for grant, 175
 - community interaction of board members, 57, 58–59
 - community involvement and high-end donors, 134
 - community Web pages, 206
 - compassion fatigue, 122
 - competing nonprofit, bringing in CEO from, 60
 - competition for fundraising dollars, 17–18
 - computerized donor lists, 111
 - connection with your cause, finding corporation with, 326–327
 - consortium grant, 174
 - contribution spending, vagueness about, 123
 - contributions
 - by individual board members, 61
 - individual contributions, 99–100
 - to NPOs, 17
 - small contributions, 99–100
 - spending contributions, vagueness about, 123
 - corporate donors
 - approaching, 327–330
 - described, 101–102
 - financial information and, 330
 - following up with, 330
 - methods of giving by, 102
 - motives of, 328
 - presentation for, 329–330
 - researching corporations to find, 327–329
 - resources for finding, 102
 - value of relationship with, 329
 - corporate foundations as source for grant, 175
 - corporate giving
 - CEO's recommendation, importance of, 326
 - connection with your cause, finding corporation with, 326–327
 - described, 323–324
 - finding corporations for, 325–327
 - local corporations, 325–326
 - promotion compared, 328
 - sources of, 327–328
 - corporations
 - and cause-related marketing, increase in, 341–342
 - challenge grants, 321
 - as fundraising market, 85
 - major gifts, 310
 - correspondence with donors, 118
 - Council for Advancement and Support of Education (CASE), 25
 - Creating Web Pages For Dummies* (Smith & Bebak), 244
 - creative mailings, 169
 - crisis appeals, 19
 - current events used in fundraising plan, 88, 207
- D •
- development committee, 63
 - development director, 38
 - development plan, 46
 - direct mail
 - annual fund drive, used in, 281
 - asking for donation in, 169
 - audience for, size of, 161
 - budget for, 164
 - client-donor relationship strengthened by, 163
 - cost of, 162
 - creative mailings, 169
 - described, 158, 160–161
 - donor honor rolls included in, 170
 - donor list and, 165
 - donor renewal and, 160–161
 - easy to read pieces, importance of, 168

- e-mail, 163
- envelope used for, 166
- fundraising plan, as first step in, 162–163
- as fundraising tool, 162
- goals of direct mail program, 164–165
- honesty in, 168–169
- included in, what should be, 166–167
- letter used for, 166
- mailing list updated through, 164
- mission statement included in, 168
- myths about, 161–163
- new donors and, 161
- organization size and, 162
- PDF versions of print pieces, links on your Web site to, 170
- personal calls, direct mail used in place of, 161–162
- personal letters, 163
- planning flow of printed pieces, 169
- pledge card included in, 170
- pledge form used for, 166
- printed materials, 158
- return envelope for, 167, 170
- simplicity in, 170
- spending of donations, explanation of, 169
- testing your direct mail piece before sending, 167–168
- thanking donors in, 170
- third-party vendors, using, 167
- tips for, 168–170
- disaster plan for bad media exposure, 210–211
- discussion groups
 - About, 270
 - AFPnet, 270
 - Charity Channel, 269
 - described, 269
 - etiquette for, 270–271
 - Internet Profit Center, 270
 - posting to, 270–271
 - promotion through, 270–271
 - sampling of, 269–270
- diversity in board members, 62
- donation boxes, 171
- donations. *See also* asking for donations
 - collected online, 249–250
 - direct mail used to tell donors how donations are spent, 169
 - gifts used for attracting donations, 230
 - printed materials, trying to get printing
 - donated, 157
 - “A Donor Bill of Rights”, 26
- donor list
 - described, 105–106
 - and direct mail, 165
 - major gift, used to plan for, 126–127, 128
 - and telephone solicitation, 214, 218
- donor visits
 - assumptions about donors, 123
 - bargaining down, 123
 - contribution spending, vagueness
 - about, 123
 - described, 115–116
 - importance of, 115–116
 - initial relationship, building, 122–124
 - potential donors, introducing yourself to, 116–117
 - promises made to donors, 123
 - receptions to thank donors, 123–124
 - thanking donors, 123–124
- donor/agency relationship
 - accountability to donors, 118
 - compassion fatigue, 122
 - correspondence with donors, 118
 - described, 117–118
 - goodwill provided by donor, 119
 - information provided to donors, 118
 - intangibles provided by donor, 118–119
 - interaction with donors, 118
 - material goods provided by donor, 119
 - mission furthered by donor, 119
 - motivation for giving, 120–122
 - options available to donors, 118
 - resources provided by donor, 119
 - services provided by donor, 119
 - tax benefits, 119–120
 - time provided by donor, 119
 - value of their gifts, showing donors, 118
 - visibility for organization provided by donor, 119
- donors
 - anonymous donors, 30
 - board’s role in finding, 103–106
 - compatibility to organization and major gifts, 308–312
 - corporate donors, 101–102

donors (*continued*)

- donor list, 105–106
- e-mail communication with, 255
- endowments, explaining value to donors of, 334–335
- e-newsletter used to address interests of, 257–258
- expanding general donor base, 104–105
- foundations as, 103
- fundraising as link to, 11–12
- honor rolls included in direct mail, 170
- individual contributions, 99–100
- information sheets used in annual fund drive, 284
- informed, becoming more, 342–343
- Internet used to find, 108–109
- involvement, levels of, 99–100
- level 1 donors, 99–100
- level 2 donors, 99–100
- level 3 donors, 99–100
- level 4 donors, 99–100
- motivation for giving, 131
- opening lines to use when meeting prospective, 347–349
- personal data on, ethics of handling, 112–113
- philanthropists, 106–107
- possible donors, data on, 100
- renewal and direct mail, 160–161
- small contributions, 99–100
- using Web sites for fundraising, 242–243
- Donors Forum of Chicago, 103
- donors research system
 - administrative data as category in, 110
 - categories of information needed for, 110–111
 - comments as category in, 110
 - computerized donor lists, 111
 - described, 109
 - education as category in, 110
 - evaluating data, 112
 - family as category in, 110
 - finances as category in, 110
 - gift record as category in, 110
 - interests and business affiliations as category in, 110
 - names and addresses as category in, 110
 - resources as category in, 110

- tracking campaign related information, 111
- visitation record as category in, 110
- door-to-door approach for annual fund drive, 281

● E ●

- Edelman, Marian Wright (*The Measure of Our Success*), 16
- e-giving, growth of, 346
- e-mail
 - addresses of people you know, acquiring, 253
 - annual fund drive, used in, 280–281
 - anonymous e-mail, sending, 271
 - asking for donation in, 254–255
 - attachments, 256
 - campaigns, 253–257
 - direct mail, 163
 - donors, communication with, 255
 - grammatical errors, 252
 - links, including, 255
 - message in, 256
 - mistakes to avoid while using, 251–252
 - opt-in lists, 254
 - organization, identifying, 256
 - perfecting, 252
 - printable forms, attaching, 255
 - Remote Assistance connection through, 227, 231–233
 - spam, 252
 - spelling errors, 252
 - structure of, 256–257
 - subject line, 256
 - tracking results from, 256–257
 - volunteers, e-mail used to find, 256
 - what to say in, 254–256
 - who to send to, 253–254
- endowments
 - administration of, 335–336
 - agreement in organization on using, 334
 - building, elements needed in, 333
 - characteristics making organization a good fit for, 332–333
 - described, 13, 299, 331–332
 - donors, explaining value to, 334–335
 - endowment policy document, 336

- financial independence provided by, 334–335
 - foundations funded by, 333
 - fundraising effort, as part of, 335
 - investment strategies for, 336–337
 - laws and regulations on, importance of
 - checking out, 337
 - management of, 335–337
 - money involved in, large size of, 333
 - online resources for, 337
 - permanent endowment, 332
 - planning for, 334–335
 - professional help in managing, 336–337
 - quasi endowment, 332
 - restricted endowment funds, 332
 - software programs used to manage, 336
 - term endowment, 332
 - tracking campaign related information, 111
 - types of, 332
 - unrestricted endowment funds, 332
 - e-newsletter
 - creating, 258–259
 - delivery of, automating, 260
 - described, 257
 - design tips, 259
 - donors' interests, addressing, 257–258
 - multimedia, adding, 259–260
 - software for, 259
 - Web site, linking back to your, 261
 - equitable exchange, recognition of, 146
 - ethics of fundraising
 - American Association of Fund-Raising Counsel (AAFRC), 26
 - Association for Healthcare Philanthropy (AHP), 26
 - Council for Advancement and Support of Education (CASE), 25
 - described, 24
 - “A Donor Bill of Rights,” 26
 - donors, personal data on, 112–113
 - ethical standards organizations, 24–26
 - grant proposal writers, paying
 - commission to, 25
 - industry standards, 26
 - National Committee on Planned Giving (NCPG), 26
 - National Society of Fund Raising Executives (NSFRE), 25, 26
 - exchange mechanism, money as, 139
 - executive committee, 63
 - executive director
 - chairman of the board, acting as, 66
 - selecting and recruiting, 61
 - expanding general donor base, 104–105
 - expectations
 - for board members, setting, 64–65
 - unrealistic expectations for fundraising plan, 87
 - of what volunteers should and shouldn't do, 68–69
- **F** ●
- families
 - foundations as source for grant, 175
 - honor and high-end donors, 134
 - of volunteers targeted for recruitment, 72
 - fear of asking for money, 137–139
 - finance committee, 63
 - financial advice and high-end donors, 133
 - financial independence provided by
 - endowments, 334–335
 - financial information and corporate donors, 330
 - Finklestein, Ellen (*Syndicating Web Sites with RSS Feeds For Dummies*), 264
 - 501(c)(3) organization, 17–18
 - 501(c)(4) organization, 17
 - focus groups
 - case statement, used in creation of, 51–52
 - for donors, 148
 - following up
 - after telephone solicitation, 226
 - after asking for major gift, 152
 - with capital campaign, 305–306
 - with corporate donors, 330
 - on grant proposals, 195
 - Foundation Center, 103, 108, 175, 328
 - Foundation Directory Online, 328
 - Foundation & Endowment Money Management, 337
 - Foundation Finder, 328
 - Foundation Reporter 2005*, 175
 - foundations
 - areas funded by, 188
 - categories for fundraising, focusing on your, 183–185
 - and challenge grants, 321

foundations (*continued*)

- data on, determining most relevant, 188–189
- defined, 174
- as donors, 103
- endowments, funded by, 333
- examples for targeting, 184–185
- as fundraising market, 86
- grants, amount of average, 188
- grants, number of awarded, 188–189
- Internet used to research, 187
- local sources for, 185–186
- locating, 182–189
- personal meetings with, 186
- researching, 182–189
- resources for, 187
- site visit to, 196
- submission process for, 189
- when proposals are accepted by, 189

fundraising

- by board members, 61
- costs, scrutinizing, 343–344
- described, 10, 13
- direct mail as tool for, 162
- donors, link to, 11–12
- effort, endowments as part of, 335
- future issues, 14
- political fundraising, 15
- reason for involvement in, knowing your, 10–11
- spark story, knowing your, 10–11
- statistics on, 14
- terminology for, 12–13
- volunteers as fundraisers, 72–74

fundraising plan

- bad timing, dealing with, 87
- budget for, 88–93
- case statement as first item in, 77
- consistency in, 87
- current events used in, 88
- described, 76–77
- direct mail, 162–163
- existing resources, assessing, 79
- expectations, having unrealistic, 87
- financial goals, setting, 80–81
- Gift Range Chart, 81
- goals, identifying, 77–78
- grants as part of, 177
- items included in, 77

- leadership, choosing, 87
- markets, identifying, 84–87
- mission, knowing your, 87
- need for, 76
- needed resources, determining, 79–80
- needs statement, creation of, 78
- red flags in, 87–88
- vehicles, choosing, 81–84

● G ●

- general gift, 13
- geographic boundaries overcome with
 - Web sites for fundraising, 242
- Gift Range Chart
 - capital campaign, used in, 303
 - described, 81
 - major gift, used to plan for, 126
- giveaways
 - attracting donations with, 230
 - budget for, 232–233
 - tchotchkes, 230
 - described, 229
 - guidelines for, 231
 - maximum exposure, using giveaways for, 230–231
 - researching, 232
- giving clubs, creating, 130–132
- Giving USA* (annual report), 14, 101
- globalization of giving, 346
- goals
 - for annual fund drive, 277–278
 - for capital campaign, 302–303
 - of direct mail program, 164–165
 - identifying, 77–78
 - of organization and case statement, 39–40
 - for planned gifts, 316
 - for special events, 291–292
 - for telephone solicitation, 216
- “good news” segment and media
 - exposure, 207
- goodwill provided by donor, 119
- governance committee, 63
- government agencies as source for
 - grant, 175
- grant proposals
 - board leadership’s role in preparing for, 179
 - board’s role in preparing for, 178

budget narrative in, 193
 case statement and, 181
 cover letter, creating, 191
 database used in, 181
 executive summary, 191–192
 following up on, 195
 grant guidelines, 189–190
 groundwork for, 177–182
 help with, 180–181
 history of organization stated in, 194–195
 introducing yourself in, 192
 leadership stated in, 194
 letter of inquiry, 189
 location of program stated in, 194
 “no” response to, 196
 online resources for writing, 194
 outline of goals, objectives, and
 evaluation in, 192–193
 process for, 181–182
 program need stated in, 192
 staffing stated in, 194
 steps in, 181–182
 training in writing, 181
 what to include in, 190–195
 writers, paying commission to, 25
 writing, 179–181, 190–195
 grant recipient, 174
 grantor, 174
 grants
 amount of average, 188
 for capital campaigns, 177
 categories for awarding, 175–177
 community foundations as source for, 175
 corporate foundations as source for, 175
 described, 174
 family foundations as source for, 175
 government agencies as source for, 175
 guidelines, 189–190
 number of awarded, 188–189
 as part of fundraising program, 177
 private foundations as source for, 175
 for program funds, 176
 program-related investments, 174
 for seed money, 176
 sources for, 175
 terminology for, 174

• H •

Habitat for Humanity, 16
 high-end donors
 advisory board credibility and, 133
 board confidence and, 133
 challenge grants, 133–134
 community involvement and, 134
 described, 132
 family honor and, 134
 financial advice and, 133
 immortality and, 134
 as lead gift givers in capital campaign, 304
 and major gifts, 132–136, 312
 management efficiency and, 133
 personal contact and, 133
 recognition and, 133, 135–136
 treatment of, 132–134
 worthwhile cause and, 134
 history of organization
 and case statement, 46–47
 stated in grant proposals, 194–195
 human services organizations and major
 gifts, 128

• I •

independent sector organization, 17
 individual contributions, 99–100
 individual donors, 85
 individual givers, growth of, 341
 initial relationship, building, 122–124
 insurance policy as instrument for planned
 gifts, 317
 intangibles provided by donor, 118–119
 interaction with donors, 118
 Internet Profit Center, 270
 Internet research, 108–109, 187
 introducing yourself in grant proposals, 192
 involvement, asking for, 149
 involvement of donors, levels of, 99–100
 IRS, 36, 109

• K •

Kushner, Malcolm (*Public Speaking For Dummies*), 202, 209

• L •

lead gifts, 13, 303–304
 leadership, 87, 194
 legal issues
 and board members, 57, 58
 and endowments, 337
 and raffles, 237
 less-than-perfect calls, 151
 Lilly Endowment, 333
 local corporations, 325–326
 location of program stated in grant proposals, 194

• M •

MADD (Mothers Against Drunk Driving), 16
 mailing list updated through direct mail, 164
 major gifts. *See also* asking for major gift
 amounts for, deciding on, 308–309
 cause-related major gifts, 310
 corporate giving, 310
 described, 13, 82, 83, 125
 donor compatibility to organization and, 308–312
 Gift Range Chart used to plan for, 126
 high-level donors and, 312
 naming opportunities, 312
 planning for, 126–127, 311–312
 relationship with major giver, 309–310
 tax issues, 310
 major giver
 annual report used to inform, 311
 asking for, 129
 communication with, 310–311
 current donors, following up on, 126–127
 donor list used to plan for, 126–127, 128
 financial goals and, 127
 giving clubs, creating, 130–132
 high-end donors, 132–136
 for human services organizations, 128
 major gift, as one who is asking for, 145
 peer-to-peer approach for, 134
 potential donors for, cultivating, 127–132
 profile of donors of, 128
 prospective donors for, 129
 recognition of, 135–136

 relationship with, 309–311
 thanking, 129–130, 135–136
 tracking information, 111
 use of gift, accounting for, 130
 markets
 affinity groups, 85
 churches, 85
 corporations, 85
 described, 76
 foundations, 86
 government, 86
 identifying, 84–87
 individual donors, 85
 material goods provided by donor, 119
The Measure of Our Success (Edelman), 16
 media exposure
 content, rewriting, 208
 current news story, linking with, 207
 disasters, controlling damage of media, 210–211
 friendly relationship with the media, cultivating, 207–211
 “good news” segment, 207
 on-air cues, 208–209
 online coverage, 205–207
 print coverage, 203–205
 PSAs (Public Service Announcements), 200–201
 quick handling of media crisis, 210–211
 television, 201–203
 mission statement
 case statement, 37–39
 clear view of, getting a, 37–38
 described, 37
 direct mail, included in, 168
 problem stated in, 38
 revising, 38–39
 solution stated in, 38
 specific ways your organization
 addresses problem, 38
 zooming in on, 38
 MissionFish, 266
 money
 attitude and, 139–142
 endowments, large size of money involved in, 333
 exchange mechanism, money as, 139
 happiness, money can’t buy, 140
 money talks, belief that, 141

root of all evil, money as, 140
 for sales campaign, collecting, 235
 success, belief that money creates,
 141–142
 moral and ethical issues for board
 members, 59
 Mothers Against Drunk Driving (MADD), 16
 motivation for giving, 120–122, 131
 multilayer giving club, 131
 myths of fundraising
 described, 27
 donor owes the world something, 29–30
 lying to get what you want, 28–29
 money is only thing fundraisers care
 about, 27–28
 wining and dining donors is all
 fundraisers do, 31–32

• N •

naming opportunities, 312
 National Association of College and
 University Business Officers, 337
 National Committee on Planned Giving
 (NCPG), 26, 319
 National Do Not Call Registry, 215
 National Society of Fund Raising
 Executives (NSFRE), 25, 26
 National Taxonomy of Exempt Entities
 (NTEE), 184
 needed resources, determining, 79–80
 needs statement, creation of, 78
 Network for Good, 250
 Newman, Diana S. (*Nonprofit Essentials:
 Endowment Building*), 335
 newsletters, 158
 “no” response
 to asking for major gift, 150–151
 to grant proposals, 196
 telephone solicitation and, 228
 nominating committee, 63
Nonprofit Essentials: Endowment Building
 (Newman), 335
 Nonprofit Hub, 337
 Nonprofit Integrity Act, 343
 nonprofit organizations (NPOs)
 active and growing, keeping your
 organization, 18–19
 building, 14–19

categories of, 15–16
 change and, 19
 Children’s Defense Fund, 16
 competition for fundraising dollars, 17–18
 contributions to, 17
 crisis appeals, 19
 described, 14–15
 differentiation of, 18
 501(c)(3) organization, 17–18
 501(c)(4) organization, 17
 funding patterns for, 17
 government funding for, 17
 Habitat for Humanity, 16
 income sources for, 17
 independent sector organization, 17
 MADD (Mothers Against Drunk
 Driving), 16
 mission statement, 18
 questions for, asking the difficult, 18–19
 responsiveness to people you are
 serving, 18
 selection of, 10–11
 third sector organization, 17
 nonrestricted endowment funds, 332
 NSFRE (National Society of Fund Raising
 Executives), 25, 26
 NTEE (National Taxonomy of Exempt
 Entities), 184

• O •

objectives of organization and case
 statement, 40–42
 online branding
 affinity programs, 271–272
 blogs, 263–265
 charity portals and malls, 265–267
 chat groups, 271
 described, 263
 discussion groups, 269–271
 instant messaging, 271
 publishing online, 268–269
 special-interest sites, 272
 online charity auctions, 266
 online coverage
 banner ads, 206
 community Web pages, 206
 described, 205
 media exposure, 205–207

- online coverage (*continued*)
 - news feeds, 207
 - posting your story, 205–206
- online events, 295–296
- online research
 - described, 108
 - government sites used to build donor list, 109
 - locating people online, 109
 - search engines used to build donor list, 108
 - Web sites used to build donor list, 108
- online resources
 - for endowments, 337
 - for planned gifts, 319
 - for writing grant proposals, 194
- opening lines to use when meeting prospective donors, 347–349
- opt-in lists, 254
- organizations
 - characteristics making organization a good fit for endowments, 332–333
 - direct mail and size of, 162
 - e-mail, identifying organization in, 256
 - endowments, agreement in organization on using, 334
 - governance of board members, 57, 58
- overhead costs, 90
- overstating in case statement, importance of not, 48

● p ●

- passion for a cause, 9
- payment, online, 250
- PayPal, 267
- permanent endowment, 332
- personal calls
 - as approach for annual fund drive, 280
 - direct mail used in place of, 161–162
- personal contact and high-end donors, 133
- personal correspondence as approach for annual fund drive, 280
- personal data on donors, ethics of handling, 112–113
- personal letters, 163
- personal meetings with foundations, 186
- philanthropists, 106–107
- philanthropy, 12, 14
- planned gifts
 - annuities as instrument for, 317
 - board members and, 316
 - characteristics of, 313, 314
 - committee for, 315
 - described, 312–313
 - educating donors on your program for, 318–319
 - goals for, 316
 - guidelines for, 316
 - insurance policy as instrument for, 317
 - marketing tips for, 318
 - online resources for, 319
 - potential donors for, 313–314
 - preparation for, 315–319
 - publicizing your program for, 318–319
 - trusts as instrument for, 317
 - vehicles for, 316–318
 - when to start program for, 314–315
 - wills as instrument for, 317
- Planned Giving Resources, 318
- Planned Giving Today, 319
- pledge cards
 - annual fund drive, used in, 284
 - described, 158
 - direct mail, included in, 170
- political fundraising, 15
- potential donors
 - data on, 100
 - introducing yourself to, 116–117
 - for major gift, 127–132
 - for planned gifts, 313–314
- predictions about fundraising
 - commercial ventures, conversion of nonprofits into, 345
 - commercialization of nonprofits, 344–345
 - corporations and cause-related marketing, increase in, 341–342
 - donors becoming more informed, 342–343
 - e-giving, growth of, 346
 - fundraising costs, scrutinizing, 343–344
 - globalization of giving, 346
 - individual givers, growth of, 341
 - wealth to be transferred, increase in amount of, 342
 - women’s role in fundraising, 345
- presale brochure fundraiser, 235
- print coverage
 - described, 203–204

local media included in, 203–204
 media exposure, 203–205
 mistakes in print, fixing, 204–205
 quotable remarks, 204
 printed materials
 annual reports, 159–160
 assembling, 158–159
 booklets, 158
 brochures, 158
 budget for, 171
 described, 155–156
 direct mail, 158, 160–168
 do it yourself printing, 157
 donated, trying to get printing, 157
 donation boxes, 171
 full-service copy shops, using, 157
 impression given by, 157
 included in, what should be, 171
 invitations, 158–159
 necessary material, deciding on, 157
 newsletters, 158
 pledge cards, 158
 publishing plan for, 171–172
 saving money on printing, 157
 selection of, 157–160
 updating, 156–157
 when to produce pieces, 171
pro bono work, 58
To Profit or Not to Profit, The Commercial Transformation of the NonProfit Sector (Weisbrod), 344
 program committee, 63
 program-related investments, 174
 project campaign, 299
 promises made to donors, 123
 promoting after the fact for raffles, 238
 proposals, grant. *See* grant proposals
 prospective board members, 56, 65
 PSAs (Public Service Announcements), 200–201
 public relations committee, 63
Public Speaking For Dummies (Kushner), 202, 209
 publishing online, 268–269

• Q •

quasi endowment, 332
 quotable remarks in print coverage, 204

• R •

radio coverage and PSAs, 200–201
 raffles
 described, 236
 financial issues, 237
 legal issues, 237
 people involved in, 237–238
 prizes for, 236–237
 promoting after the fact, 238
 thanking volunteers involved in, 238
 tickets for, 236
 The Raiser's Edge, 111
 reason for involvement in fundraising, knowing your, 10–11
 receptions to thank donors, 123–124
 recognition
 of high-end donors, 133, 135–136
 of major giver, 135–136
 of volunteers, 70–71
 recruitment
 of board members, 62–65
 of volunteers, 71–72
 relationships. *See also* donor/agency relationship
 with major giver, 309–311
 with board members, 56
 reputation of board members, 58
 research
 for annual fund drive, 283–284
 and case statement, 48
 for corporations to find corporate donor, 327–329
 on foundations, 182–189
 for giveaways, 232
 online research, 108–109
 resources
 donor provided, 119
 for foundations, 187
 online resources, 194, 319, 337
 responsibilities of board members, 57–61
 restricted endowment funds, 332
 retirees as volunteers, 74
 retreats for board members, 66–68
 revisions
 case statement, 35, 45, 48–49
 finance section of case statement, 45
 mission statement, 38–39

• S •

sales campaign
 described, 233
 door-to-door selling, 234
 money, collecting, 235
 organizing, 234–235
 presale brochure fundraiser, 235
 sales skills of a good fundraiser, 24
 search engines
 donor list, used to build, 108
 Web sites for fundraising exposed to, 248
 seminars, 295
 services provided by donor, 119
 site visit to foundations, 196
 small contributions, 99–100
 Smith, Bud (*Creating Web Pages For Dummies*), 244
 social issues
 described, 22
 ethical fundraisers, 23
 sales skills of a good fundraiser, 24
 skills of a good fundraiser, 24
 skills of a good salesperson, 23
 stigma of fundraising, 22–23
 software
 for e-newsletter, 259
 endowments, managing, 336
 for fundraising, 92–93
 spark story, knowing your, 10–11
 special events
 annual fund drive, as approach for, 281
 awareness raised by, 288
 branding and, 295
 budget for, 292
 committee for, putting together, 289
 described, 287–288
 event, holding, 290–291
 goals for, 291–292
 happiness quotient for, rating, 292
 online events, 295–296
 planning for, 288–293
 repeating, 295
 selection of, 290
 success of, recognizing, 294–295
 thanking participants, 296
 timeline for, 293
 staffing and budget for fundraising plan, 90–92

stakeholders
 board members as, 98
 clients as, 98
 current donors as, 98
 described, 97–99
 major donors as, 98
 neighboring organizations as, 98–99
 past donors as, 98
 staff as, 98
 testing case statement ideas with, 49
 statistics on volunteering, 12
 stigma of fundraising, 22–23
 SWOT (Strengths, Weaknesses, Opportunities, and Threats), 67–68
Syndicating Web Sites with RSS Feeds For Dummies (Finklestein), 264

• T •

tax benefits, 119–120
 telephone solicitation
 annual fund drive, used in, 281–282
 belief in your cause during, 227
 budget for, 216–217
 callers, finding and training, 221–222
 cellphones and, 215
 described, 213
 disenchanted listener type, dealing with, 225–226
 donor list and, 214, 218
 doubter type, dealing with, 224
 following up after, 226
 friendliness during, 227
 goals for, 216
 hanger-upper type, dealing with, 223
 inquisitive listener type, dealing with, 224
 knowledge of script during, 227
 materials for callers, 219–221
 name of donor, getting correct, 228
 National Do Not Call Registry, 215
 “no” response, 228
 ongoing telephone solicitation programs, 216
 planning for, 215–226
 respect for donor during, 226
 rules for, 226–228
 script for, 220
 short-term telephone solicitation programs, 216

- “smile” used during, 227
- stressed professional type, dealing with, 225
- successful calls, how to make, 214
- targeting prospects for, 217–218
- troubleshooting difficult calls, 223–226
- volunteers used in, 73–74, 221
- when to call, 222–223
- television coverage
 - donations of, 202
 - how to get, 201–202
 - interviews, 202–203
 - media exposure, 201–203
 - PSAs (Public Service Announcements), 200
 - volunteers helping with, 203
- term endowment, 332
- terminology for fundraising, 12–13
- thanking
 - direct mail used to thank donors, 170
 - donors, 123–124, 170
 - major giver, 129–130, 135–136
 - participants in special events, 296
 - volunteers, 70–71, 238
- time provided by donor, 119
- tracking campaign related information, 111
- training
 - of volunteers, 73–74
 - in writing grant proposals, 181
- trusts as instrument for planned gifts, 317
- video, case statement as, 35–36
- visibility for organization provided by donor, 119
- volunteers
 - areas where there is a need for, identifying, 71
 - attitudes toward, quiz on, 68–71
 - board members helping to build volunteer group, 72
 - clients as source of, 72
 - defined, 13
 - e-mail used to find, 256
 - existing list of volunteers, reviewing, 72
 - expectations of what volunteers should and shouldn’t do, 68–69
 - families of volunteers targeted for recruitment, 72
 - finding, 71–72
 - as fundraisers, 72–74
 - happy volunteers, 69–70
 - need for, 68
 - as phone solicitors, 73–74
 - recognition of, 70–71
 - retirees as, 74
 - thanking, 70–71, 238
 - training of, 73–74
 - unhappy volunteers, 70
 - used in telephone solicitation, 221
 - Web sites for fundraising, information useful for volunteers on, 245–247

• U •

- United Way, 59, 90, 202
- Urban Institute’s National Center for Charitable Statistics, 184
- US Nonprofit Gateway, 109

• V •

- value of their gifts, showing donors, 118
- vehicles
 - annual campaign, 82
 - capital campaign, 82, 83
 - choosing, 81–84
 - comparing, 83–84
 - described, 76
 - major gifts, 82, 83
 - planned gifts, 82, 83, 316–318

• W •

- wealthy people, prejudices about, 144
- Web sites
 - Active Giving, 250
 - Catalog of Federal Domestic Assistance, 109
 - Children’s Defense Fund, 16
 - Combined Federal Campaign, 109
 - Foundation Center, 175, 328
 - Giving USA, 101
 - Habitat for Humanity, 16
 - IRS, 109
 - MADD (Mothers Against Drunk Driving), 16
 - MissionFish, 266
 - National Committee on Planned Giving (NCPG), 26, 319

Web sites (*continued*)

- National Society of Fund Raising
 - Executives (NSFRE), 26
- Network for Good, 250
- PayPal, 267
- Planned Giving Resources, 318
- Planned Giving Today, 319
- Urban Institute's National Center for Charitable Statistics, 184
- US Nonprofit Gateway, 109
- used to build donor list, 108
- Windows Update, 254
- WorldPay, 250
- Web sites for fundraising
 - asking for donations, 249
 - contact information on, 245
 - content, adding, 245–247
 - creating, 241–245
 - do it yourself, option of, 244
 - donations collected online, 249–250
 - donors using, 242–243
 - e-newsletter linking back to your, 261
 - existing materials, using, 246
 - geographic boundaries overcome
 - with, 242
 - hiring it out, option of, 244–245
 - links to, adding, 248–249
 - need for, deciding if you have a, 242–243
 - online events, 295–296
 - other Web sites, pulling content from,
 - 246–247
 - payment, online, 250
 - publicizing, 247–249
 - search engines, exposure to, 248
 - self-publicizing, 247
 - uses of, 243–244
 - volunteers, information useful for,
 - 245–247
 - writing content, 246
- Weisbrod, Burton A. (*To Profit or Not to Profit, The Commercial Transformation of the NonProfit Sector*), 344
- wills as instrument for planned gifts, 317
- women's role in fundraising, 345
- writing
 - blogs, 265
 - case statement, 36–49
 - grant proposals, 179–181, 190–195