

Team-Based Fundraising Step by Step

A Practical Guide to Improving Results Through Teamwork

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Preface

THE YEARS AHEAD will bring new and exciting challenges for nonprofits in the area of fundraising. Wise nonprofits are already studying trends in fund development and revising how they manage their fundraising efforts.

These nonprofits are choosing a team approach as their strategy for fundraising management. This means that the board of directors, the executive director, development director (when this position exists), all other staff, and nonboard volunteers are working together strategically to raise needed dollars for their organization.

My premise is that nonprofits must adopt a team approach in fundraising to compete for the financial resources needed to sustain and expand programs. With the continually increasing growth of the nonprofit sector and continued limited resources, it makes sense that an organization, if it is going to thrive in the years ahead, will require a team to cultivate donors and bring in the funds.

The current literature on fundraising often includes a description of the advantages of using a team approach to fundraising. For instance, numerous "how to" books on fundraising contain excellent tips on getting the board involved and making sure the board chair and executive director are active fundraisers. Yet they provide only minor focus on the steps to creating an interactive board-staff-volunteer fundraising team and to managing it effectively.

Team-Based Fundraising Step by Step fills this gap in the current literature with its focus on a step-by-step approach to building a fundraising team consisting of everyone in the nonprofit. It brings together knowledge of organizational development and fundraising and shows how to move nonprofits through a team-building process to strengthen fund development.

This book will be especially useful for staff in small to medium-sized nonprofits, particularly for executive directors, development directors, or any other staff people with the task of coordinating fundraising efforts. These individuals can easily use the step-by-step approach to guide them in developing their fundraising team and getting everyone involved.

Larger nonprofits will also find the team approach helpful. These nonprofits can use the step-by-step approach to focus on a particular fundraising strategy, such as a major special event or donor campaign.

This book will be equally useful for board members of all nonprofits. They can use the step-by-step approach to become more involved in fundraising and to identify ways to interact with staff and nonboard volunteers in carrying out their responsibilities.

The book is written for the novice fundraiser who is learning the techniques of raising funds and is looking for a strategic way to involve everyone in the organization. It is also written for the seasoned professional who has years of fundraising experience and already sees the value of building a fundraising team in a nonprofit. Consultants to nonprofits will, no doubt, find these team-building ideas to be practical tools for helping their clients become more effective fundraisers.

Generally speaking, groups that commit to the ideas of this book will need to plan on a year of team building and transformation to move through the steps successfully. I provide more specific time frames throughout the book that give a sense of how long it takes to complete each step.

The step-by-step approach to building a fundraising team looks like this.

Organizing the Team

Step One: Agreeing on a team approach

Step Two: Forming the leadership group

Step Three: Building the fundraising team

Preparing the Team

Step Four: Focusing the team with a vision and mandate

Step Five: Developing the fundraising plan (goals and objectives)

Step Six: Training the team to fundraise

Taking Action (All these steps usually occur simultaneously.)

Step Seven: Identifying potential donors

Step Eight: Cultivating donors

Step Nine: Asking for contributions

Step Ten: Recognizing donors

Evaluating Progress

Step Eleven: Evaluating team progress and health

The book begins with examples of the current processes in fundraising management that are used in most nonprofits and shows why they are not working well. I compare these processes with the team approach and offer the team approach as a solution to making fundraising more effective in your organization.

Part One describes the steps necessary to build your fundraising team, starting with agreeing that a team approach is necessary and following through to building the team. Part Two brings the team into focus with a vision, mandate, and plan of action. It also describes a process to train your team effectively to fundraise. Part Three contains the steps for putting the team into action. It discusses the major tasks of fundraising: identifying prospective donors, cultivating them, asking for contributions, and recognizing their generosity. This section presents a picture of who does what on the team. To demonstrate how this approach can be applied in a nonprofit, it gives examples of organizations that are using a team approach. Part Four concludes discussion of the step-by-step approach with strategies to evaluate fundraising success as a team.

My goal in writing this book is to provide you with a clear guide to building a powerful fundraising team. I passionately believe that fundraising is most powerful when everyone in an organization participates. I ask you to participate in the dream of a nonprofit sector that successfully raises resources sufficient to meet the demands of our society. I believe that you will realize this dream more quickly by taking the time to develop a team approach to fundraising.

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