Index

Accountability, 25
Accountants
   as board members, 255
   donation of services, 279
   planned-giving, role in, 214
   review of gift-handling and gift-processing procedures, 25, 75, 108
Acknowledgments. See Thank-you letters and acknowledgments
Advice, asking for, 130
Advisory council/board/committee, 113, 227, 232, 279
Analysis and planning
   planned giving, 213–214
   resource development, 17–21
Annual campaigns
   request amount, 93, 133, 268
   and resource development, 121
   strategy, 41–42
Annual meeting, 102, 262
Appointments
   board recruitment, 262
   for interviews, 234
   with major gift prospects, 115, 119, 120, 126
   personal contact, importance of, 219
   planned giving, 222
   with prospective volunteer solicitors, 90
   steps to secure, 135
Association of Fundraising Professionals (AFP), 48, 181, 277, 284
Attrition, 1164, 138, 139–140, 241, 303
   Sample report, 304
Attorneys
   as board members, 255, 265
   donation of services, 279
   planned giving, role in, 206, 214, 217
   on prospect rating committee, 87
Baby Boomers, 9, 204
Balance, 5, 23, 49
Base of support, 5, 11, 34, 38, 39, 229, 230, 246
Bequests
   defined, 203, 205–206
   donor education, 217–218
   and endowments, 42, 219–220
   personal solicitation, 219
   sample language, 206
   use of proceeds, 213
   value to nonprofits, 8
Board of directors
   accountants as board members, 255
   attorneys as board members, 255, 265
   characteristics and qualifications of board members, 254–256
   as donors, 30, 126, 246, 248
   and endowment/capital campaigns, 239–240
   evaluate prospects, 87
   giving policy, 261–262
   meetings, 14, 263, 265
   motivation and involvement, 262–263
   nominating process, 257–261
Board of directors (Continued)
orientation, 263
in planned giving, 213
pledge card, 121, 122
recruitment, 258, 261–262
retreats, 264–271
role of, 253, 254
size of, 227
as solicitors, 134
Bouncebacks, 154
Breakfast meetings, 102, 238
Brochures, 54, 55–56, 154, 217–218, 222, 240, 286
Budgets and budgeting
development office budget, sample, 29
fundraising budget, 20, 26–30
and goal-setting, 30–33
monitoring, 34–36
overall budget, 25–26
process, 27–28
and resource development,
reports, 35–37
responsibility for, 14
Burn-out, 22, 249, 257, 280
Calendars. See Scheduling and calendars
CAN-SPAM, 163
Canadian Radio-television and
Telecommunications Commission
(CRTC), 169–170
Capacity to give
determining, 90–94
giving relative to means, 251
and goal setting, 32,
and prospect identification, 4, 117, 233
and prospect rating, 83, 85–90, 239, 251
Capital campaigns
advancement phase (quiet phase), 237–240
and annual campaigns, 40–41
arts institutions, 248
characteristics of, 5, 38–39
churches, synagogues and houses of
worship, 245–246
community and online colleges,
247–248
cost effectiveness, 34
factors for success, 117
follow-up activities, 241–242
goal setting, 32, 91, 92
hospitals, 246
institutional differences, 245–249
intermediate phase, 240
interview questions, 234, 236
interview request letter, sample, 235
major gifts, 226–230
named gift opportunities, 53,
112–113, 239
organization and structure, 249–252
planning study (feasibility study), 31, 234–237
private schools, 248
public phase, 240–241
readiness for (prestudy phase),
230–234
request amount, 92–94, 239
social service and youth groups,
248–249
steps for success, 225–234
timeline for, 230, 231
universities, 246–247
Case for support. See Case statements
Case statements
brochures, 54, 55–56
comprehensive formal case statement,
52–54
fact sheets, 56
formats, 55–59
group presentations, 59–60, 216
and major gift presentation materials,
124, 125, 127–128, 130,
market-specific, 55
personalized, 54, 55, 56
and planned giving, 216
process, 54
purpose of, 51–52
situation-specific, 234,
support for, gauging, 54
DVDs, 56–59, 121
writing, 54
Cause-related marketing, 189–190
Charitable gift annuities
described, 206–208
illustration, 207
marketing, 220–224
sample agreement, 223
sample letter to prospect, 221
Charitable remainder annuity trusts, 210–211
Charitable remainder trusts, 236, 243, 247
Charitable remainder unitrusts, 208–210
Check-handling, 24–25
Churches, synagogues and houses of worship
capital campaigns, 245–246
as donors, 18, 64, 77, 79
and leadership giving, 230, 270
pledge payments, 241
regular giving and capital campaigns, 40, 229–230
as source of prospects, 79, 82
strategic partnerships, 9
tithing and capacity to give, 91
Codes and coding
appeals and mailings, 76–77, 143, 146, 161
for postage sorting, 160, 161
prospect ranking, 84–87
sort codes, 176
source codes, 74
thank-you coding, 63
type codes, 77
user-defined codes, 77
Codicils, 165, 205, 214, 215
Collaboration, 8, 10, 23
Colleges. See Universities
Committees
advisory committee, 232
board committees, 14, 20, 232, 263
capital campaigns, 249, 250
for case statement, 54
consultant selection committee, 283–286
finance committee, 26, 255
grant review, 200
to increase donor involvement, 103, 134,
nominating committee, 257–261, 262, 263
planned giving, 214–215
planning study committee, 234
prospect study committee, 87, 88, 90, 92
for special events, 186–188
resource development, 20, 233
Comprehensive campaigns, 40–42
Confidentiality
for consultants, 283, 285, 286
data and donor information, 78, 171
and volunteers, 171, 173
Constituents as prospects, 80
Consultants
for capital campaigns, 230, 238
contracts with, 286
and planned giving, 216, 217
and planning studies, 234, 237
recommendations, implementing, 287
role of, 281–283
selecting, 283–286
Corporate reports as prospect information source, 94
Correspondence. See Letters; Thank-you letters and acknowledgments
Council for Advancement and Support of Education (CASE), 48
Covey, Stephen R., 128
Crowdfunding, 190–191
Credibility, 25, 98, 154, 166
CRTC, 169–170
Current gifts and planned giving, 204–205

Development director
budget responsibilities, 26
collection processing and acknowledgments, 108
and goal setting, 277
hiring, 274
job description, 274
and planned giving professionals, working with, 214
qualifications, 275–277
role of, 219, 273, 274

Development staff
activity analysis, 64–66
as donors or prospects, 3, 80, 81
goals and expectations, 271–272
and growth of nonprofit, 156
hiring process, 274–277
job descriptions, 19, 44, 271
large offices, special issues related to, 42–45
and major gift solicitations, 127–135
performance appraisals, 277–278
planned giving, 218, 220
prospect research, 83, 84–88
respect, 14
retention, 277–278
roles and responsibilities, 44, 74, 76
small offices, special issues related to, 42–45
training, 73, 75, 271, 272

Direct mail. See Mail, Direct Response.
Direct response, 137, 181, 303
Do Not Call list, 170

Donation processing, 75, 108, 152, 273–274
Donor acquisition programs. See also Prospects
cost, 34
mailings, 44, 138–141, 147, 148, 153
155, 158,
and planned giving, 215, 218, 221
reporting, 303
telephone solicitation, 181
Donor education and planned giving, 215–216
Donor walls, 113

Donors
Acknowledgment 300–301. See also Thank-you letters and acknowledgments
benefits for various gift categories, 53, 108, 109, 111–114, 124, 186, 301
See also Gift clubs
capacity to give. See Capacity to give and friend-raising. See Friend-raising
lapsed donors as prospects, 80, 81–82
motives for giving, 23
people give to people to help people, 1, 77, 83
personal relationships with, 5, 21
planned giving. See Planned giving prospects. See Prospects
records, 18. See also Record keeping
respect for, 5, 105, 168, 224
tour of facilities, 99, 114, 224
type codes, 77
types, 77
and use of contributions, 77, 307
Drucker, Peter, 22–23
Dunlop, David, 105

80/20 rule, 5, 6, 24
eAppeals
in annual fund drives, 38
best practices, 162, 168
in capital campaigns, 241
for communication, 66
frequency, 44
fundraising, 62, 63, 162–163
laws governing, 163
newsletters, 165–166
for phone-a-thon, 173, 176
in planned giving, 217
relationship building, 97, 98, 99
for special events, 187, 188
thank yous, 134
and website, 167
Email, see eAppeal.
eNewsletter, 98, 167, 168
Embezzlement, 98, 167, 168
Endowment campaigns. See also Capital campaigns
and board members, 270
campaign organization and structure, 230–241,
and case statements, 42, 226. See also Case statements
characteristics of, 38–39
and comprehensive campaigns, 40, 41, 42
consultants, role of, 282. See also Consultants
factors for success, 227, 251
and institutional differences, 28, 245–249
and major gift fundraising, 109, 116, 117. See also Major gifts
as method of building endowments, 225
request amount, 268–269
Endowment funds
and budgeting, 27, 28
campaigns. See Endowment campaigns
goals, 17
management, 214
methods of building, 213, 219–220, 242–245
operating foundations, 195
and planned giving, 204, 213
Ethics
and confidentiality, 48. See also Confidentiality
and resource development, 45–48, 305
telephone callers, compensation, 181
Evaluation and monitoring
budget, 14, 26–28, 34–36
donors and prospects, 33, 45
environment, 9, 10, 11
fundraising assessment form, 21–292, 292–302
of grants, 200, 201
of goals, 198
need for, 20–21, 23, 49
and prospects, 84, 282
of staff, 45, 271, 277–278
and resource development, 22, 49, 66
FCC, 169–170
Feasibility study. See Planning study (feasibility study)
Federal Communications Commission (FCC), 169–170
Feedback
community perceptions, 14
staff members and performance appraisals, 278
Filing systems, 77–78
Finance committee, 14, 26, 255
Financial information as part of major gift presentation materials, 122, 124
Financial record keeping, 19, 21, 61, 62, 73, 74–76, 301
Focus groups, 14, 102, 238
Foundation Center, 196
foundation database, 196
Foundations
  Grants Index, 95
  reports and directories as source of prospect information, 95
  researching, 196–197
  types of, 195
Freemiums, 155
Friend-raising activities, 97–105
donor acknowledgment. See Thank-you letters and acknowledgments
importance of, 23
moves management, 105–110
newsletters, 165
Fundraising strategies
  analysis of, 19–21, 21–23
  and budgeting, 26–30
cost effectiveness, 30, 33–34, 115, 289
  and donor benefits, 111
  process, 11–12
  reports to support, 64, 66
  and staff knowledge, 271–273
  software to support, 62–63, 73–74, 75
types of, 36–42
Generations, 164, 204
Gift acceptance policy, 213, 214, 220
Gift clubs
  major gifts, 111, 113, 117, 124, 143
  planned-giving societies, 114, 224
Gift range calculator, 228
Giving USA, 203
Goals
  capital fund drive, 225–229, 230
development staff, 271, 277
  endowment, 17, 244
  fundraising, 30–33
Grants
  applications, 198–200
cost effectiveness, 33–34
defined, 193–194
donor–advised funds, 201–202
foundations, 195. See also Foundations
government grants, 194–195
myths, 193
  project development, 197–198
reporting requirements, 201
thank-you letters, 201
Grants Index, 95
Hospitals
  capital campaigns, 112, 246
donor lists as source of prospects, 82
  endowment campaigns, 244
  and prospects, 80
  staff solicitations, 239
Informal get-togethers, 102
Information management
  acknowledgments, 63–64
  backups, 78
call forms, 176, 177
  and capital campaigns, 241–242
  communications, 66, 73
  consultants, role of, 282
data integrity, 76–77
database maintenance, 73, 77, 301
dedicated fundraising software, 19, 61, 62–63, 64, 73–74, 75, 76, 77–78
donor information, 74, 78, 105
filing systems and procedures, 77–78
flags, 176
functions of, 61
fundraising strategies, support of, 62–63
giving history, 76, 78, 83, 151, 171, 176, 179
management buy-in, 61, 73, 74
procedures and data entry, 25, 74, 75–76, 108
promotion codes, 146
record keeping, 62, 73–74, 75–76
reports, 64–66
software selection, 73–75
sort codes, 176
type codes, 77
user-defined codes, 77
Information technology. See also Information system
and data security, 168
and trends affecting nonprofits, 9
Interview, major gift solicitation
case for support, stating, 127–128
closings, 130–132
involvement, encouraging, 128–130
rapport, building, 127
responding to prospect’s answer, 133–134
response, waiting for, 132
steps, overview, 127
summarization, 130–132
training and role playing, 134–135
Involvement device, 154
Lawson, Douglas M., 132
Letters. See also Mail and e-mail
fundraising; Thank-you letters and acknowledgments
appeal letter, 143, 147–155
automated, 63, 108
capital campaigns, sample letter
requesting interview, 235
frequency, 144, 145–146
friend-raising, 97–99
grants, thank-you letters, 201
major gift appeals, 143, 146
major gift thank-you letters, 63, 108
personalized, 142, 143, 145, 151, 160
phone-a-thon follow-up letters, 178
phone-a-thon volunteers, 173
planned giving thank-you letters, 223
reference letters, 276
request for proposals, 194, 283
requesting foundation publications and general information, 196
to study participants, 234–235
thank-you letters, timing of, 107–108
Lettershops, 159, 161. See also Mail and e-mail fundraising
Lift note, 154
List exchanges, 158
List rental, 157–158
Listening, importance of, 127, 173
Luncheons, 102, 105, 114
Mail, Direct Response
annual fund drives, 37–38, 145
appeal letter, 143, 147–155
brochures, 154–155
budgeting for, 26–30
combined with phone program, 179
cost effectiveness, 33–34
design, 147–155
donor acquisition mailings, 138–141
e-mail, 162–163
enclosures, 154–155
factors for success, 146–147, 150–152
frequency of, 145–146
lapsed donors, 143–144
mail house, 159–161
mail lists, 155–159
mail preparation, 159–161
newsletters as part of direct response program, 164–166
and online giving, 152
outside envelope, 147–148
postal regulations, 161
and public relations, 144–145
renewing and upgrading support, 141–143
response forms or devices, 150–152
return envelope, 154–155
return on investment, 146
scheduling, 145–146
Mail, Direct Response (Continued)
small organizations, 159–160, 167
testing, 138, 141144, 146–147, 147,
151, 153, 154, 155, 157, 161,
165–166
Mail house, 159–161
Mail list, 155–159
Mailings, informational, 144–145
Mailings, planned giving, 218, 222
Major gifts
appointments, getting, 126
benefits of major gift program,
call report forms, 121, 123
capital campaigns, 117
case for support, personalized, 121,
124–125
cost effectiveness, 33–34
endowment campaigns, 117
and financial commitment of
solicitor, 125–126
follow-up, 134
gift clubs, 111–112, 113–114, 117, 124
pacesetting contributions, 116–117
pledge card, 121–122
preparation for major gift initiative,
117–126
presentation materials, 121–125
recognition, 109–110, 110–113
and relationship building, 22, 97, 117,
121
request amount, 4, 90–94
research on prospects, 83–84
solicitation interview, 127–134
soliciting, persons responsible for,
117–118, 279–280
special projects, 116
sponsorships, 116
thank-you letters, 134
timing of solicitation, 118–121
training and role-playing, 134–136
Marketing plan for charitable gift
annuities, sample, 220–224
Meetings
annual meeting, 102
board of directors, 14, 263
breakfasts and luncheons, 102
Mergers, 10
Mission
and grants 196
board responsibility toward, 254
importance of, 2, 12–13
mission and events, 184, 185
mission and social media, 164
mission statement, 11–12
mission statement and retreats,
266–267
Motivation
board members, 262–263
philanthropic, 25, 94, 115
and role of development
professionals, 23, 94
staff, 277–278
volunteers, 279
Moves management, 105
Naming rights and named-gifts, 47, 53,
113, 131, 239
National Association of Independent
Schools (NAIS), 48
National Committee on Planning
Giving (NCPG), 48
Net contributed income
and acquisition mailings, 138–141
budget analysis and reports, 26–30
and events, 116, 183, 184–185,
and fundraising strategy analysis,
19–20, 21–22, 42, 44–45, 49
and lapsed donors, 144
maximizing, 271
monitoring, 30, 34–36, 289
and setting fundraising goals, 22,
30–33
and sponsorships, 184, 188
and strategic management, 11
Newsletters
  for capital campaigns, 241
  in direct response program, 164–166
  frequency, 44
  and friend-raising, 165
  electronic, 98, 167, 168
  photographs in, 103
  planned giving, appeals for, 205, 217, 220, 224
  print, 97, 98
  for reporting, 154
90/10 rule, 4–5
990, 95, 122, 195, 196
Nominating committee, 14, 257–261, 262–263
Nonprofit sector
  charitable contributions, sources of, 8
  economic impact, 8
  importance of, 7
  opportunities and challenges, 8–9
Objections, responding to, 81–82, 128–130
Pareto’s rule (80/20 rule), 4–5, 21
Petitions, 154
Photos, 54, 103, 141, 148, 165, 165, 166, 167
Photo permission, 103
Planned giving
  accountants, role of, 214
  and age of organization, 215
  alliances for promoting, 216
  analysis and planning, 303
  attorneys, role of, 214
  bequests, 205–206
  and case statements, 216
  charitable gift annuities, 206–208
  charitable remainder annuity trusts, 210–211
  charitable remainder trusts, 208
  charitable remainder unitrusts, 208–210
  committee, 214–215
  and comprehensive campaigns, 40–41
  consultants, 282
  cost effectiveness, 33–34
  current gifts, 204
  defined, 203
  and development staff, 273–274
  and donor education, 213–214, 215–216
  donor recognition, 110, 114, 219
  endowment funds, 204, 213. See also
  Endowment funds
  gift acceptance policy, 214, 220
  gift clubs, 114, 224
  importance of, 203–204
  life insurance, 213
  marketing plan for charitable gift
  annuities, sample, 220–224
  National Committee on Planning
  Giving (NCPG), 48
  newsletter appeals for, 205, 217, 220, 224
  opportunities, 204
  planned-giving societies (gift clubs), 114, 224
  real estate, 212–213
  and resource development
  committee, 14
  wealth replacement trusts, 211–212
  wills and trusts, 205–206
Planned-giving societies (gift clubs), 114, 224
Planning study (feasibility study)
  capital campaigns, 39, 223, 234–237
  committee, 234–237
  consultants, use of, 31, 282
  and goal setting, 31
  Plaques, 110–111
Pledge cards, 121, 134, 179, 280
Postal regulations, 161
Pre-campaign planning study. See Planning study (feasibility study)

Premiums, 111

Principles of fundraising
80/20 rule and trend toward 90/10, 5, 6, 24
balance, need for, 5, 23, 49
people give relative to their means, 2–3
people give to people to help people, 1–2
right person, right prospect, right amount, right project, right time, right way, 3–4
those closest to organization set the pace, 3

Privacy, 158, 179

Professional services, donation of, 255, 265, 279

Prospects
affluent individuals with peer relationship, 82–83
board members as, 80
classes of donors, 79–80
constituents, 80
current donors, 81
donors to similar organizations, 82
and friend-raising. See Friend-raising
lapsed donors, 81–82
major gifts, 83–84. See also Major gifts
rating and evaluation, 84–90
research, 83–84
staff as, 81
team visits, 90
tour of facilities, 99, 114, 224
tracking form for prime prospects, 105–107
use of information on, 84–94
vendors, 82
volunteers as, 80

Public relations, 12, 44, 46, 98, 137, 144–145, 189, 240, 254, 255, 272, 273

Rating prospects
capacity to give, determining, 83, 85–90, 239, 251
code page, sample, 86
committee, 87–88, 90–92
Compiled Prospect Rating Form, sample, 89
cover page for rating forms, sample, 84
keys, use of, 84–85
meeting, 87–88
process for, 84–92
Prospect Rating Form, sample, 85
request amount, determining, 92–94

Real estate and planned giving, 212–213

Record keeping
donor records, 62–63
procedures, 73–78
system, 73–75
software, 61–64, 66, 73

Relationship building and nurturing,
importance of, 97–105, 121. See also Friend-raising

Reports
attention-directing, 64–66
budget, 34–36
cash-flow projection, 66–67
contact management, 70–71
development officer, 45–46, 302
filing systems, 77–78
follow-up dates, 66, 123
net contribution, 29, 34–36
revenue goal, 69
problem-solving, 66
scorekeeping, 30, 64
software, 73, 74, 75
solicitation analysis, 72
solicitor reports, 45–46, 302
Request amount
and capacity to give, 90–94. See also
Capacity to give
capital and endowment campaigns, 86, 92–94, 233, 239. See also
Capital campaigns; Endowment campaigns
determining, 86, 88, 90–94, 268–269
and fundraising goals, 30–32
major gifts, 45–46, 118, 134
personalizing, 4, 151
and prospect rating, 45
and telephone solicitations, 174
Research
foundations, 196–197
prospects, 83–84
Resource development
analysis and planning, 17–21
annual campaigns, 121
and budgets, 25–30
capital campaigns. See Capital campaigns
committee, 20, 233
comprehensive approach, 40–42
and dedicated fundraising software,
62–63, 73–74. See also Information system
effectiveness, 21–23
efficiency, 23–25
donation campaigns. See
Endowment campaigns
ethics, 45–48, 305
evaluation, 22, 49, 66. See also
Evaluation and monitoring
fundraising goals, setting, 33–33
hybrid fundraising modes, 39–40
and information system, 61, 62–63, 73–74
and planned giving, 34, 44–45. See also Planned giving
special projects, 17, 41–42, 116
Respect
board and staff, 14, 47, 263, 277
for donors, 5, 105, 168, 224
for volunteers, 278
Response cards. See Response device.
Response form. See Response device.
Response device, 147, 150–152, 159
and case statement, 55
and newsletters, 98, 165
and testing, 147, 154, 161
and planned giving, 218, 222, 224
Response rates
annual fund drives, 38
appeal letters, 145–146, 148, 151
and brochures, 154–155
and donor acquisition mailings,
138–141, 153
and factors for success, 273, 303
and freemiums, 155
in-house mail lists, 145
and involvement devices, 154
and lapsed donors, 144
and lift notes, 154
and news articles, 154
newsletters, 165
and petitions, 154
and problem-solving reports, 66
and surveys, 155
and telemarketing, 174, 178
and test mailings, 157
and timing of appeals, 42
Retired Americans, 9,
Retired people as volunteers, 256, 257, 279
Retreats, 14, 264–271, 282, 283
Right person, right prospect, right amount, right project, right time,
right way, 3–4
Sargeant, Adrian, 164
Scheduling and calendars
and board members, 256, 257, 263, 264–265
Scheduling and calendars (Continued)
development professionals, 23
and grants, 42, 196
for hiring, 275
high-priority activities, 21, 23–24, 42
and mailings, 145, 179
and projections, 35
relationship-building activities, 97, 104–105
Segmentation,
and direct response, 38, 63, 66, 142–143, 145, 159, 273
and planned giving, 222
and prospects, 83–84
and telemarketing, 171
Smith, G. Taylor (Bunky), 105
Social and informative gatherings, 111–114, 238, 240, 263
Software
and capital campaigns, 241–242
consultants, role of, 282
cultivation process, 105,
dedicated fundraising software, 19, 20, 61. See also Information system
and gift acknowledgement, 63–64, 105–108
planned-giving software, 216
and prospect research, 83
record keeping, 62
and reports, 64–66, 290
selection, 73–77
supporting fundraising, 62–63, 66
transferring data to new system, 19, 74
Special events
cost effectiveness of fundraising, 34
examples of, 183
planning for, 186–189
profitability, 188–189
selecting, 184–185
sponsorships, 184
timeline, sample, 186–187
Special projects, fundraising for, 17, 41–42, 116, 197, 268
Sponsorships, 21, 7682, 112, 116, 184
Staff. See Development staff
Statistics on giving, 8
Strategic management, 10–12
Strategic partnerships, 9–10
Strategy, 5, 33, 36, 39, 41–42, 103, 105.
See also Fundraising strategies
Surveys, 155
Suspects, 45, 83, 86, 94–95
SWOT (strengths, weaknesses, opportunities and threats)
analysis, 11–12, 282
Target audience, 146, 148, 306
Team building, 23, 264,
Telemarketing.
confirmation letter to volunteer, sample, 173
cost-effectiveness, 169
ethics, 169–170
forms, 176–177
legal issues, 169–170
and mail campaign coordination, 179
managing, 177–179
orientation, 173–177
planning for, 170
professional campaigns (paid callers), 180–181
public perception, 168
scripts, 175–176
thank-you letter, sample, 178
timeline, 171
tips for callers, 174
using volunteers, 170–171, 179–180
volunteer recruitment, 172
volunteer scheduling form, 172
Text-to-give, 163–164
Thank-you letters and acknowledgments and automation, 25, 63
and donation-handling system, 24–25
donor acknowledgment, 105
donor recognition program, 53, 63–64, 109–110
grants, 201
involvement opportunities, 113–114
and legal requirements, 104, 223
major donors, 103–104
newsletters and other publications, 103
permanent recognition, 112–113
phone-a-thons, 171, 178
plaques, 110, 111
prospects, 104
receipt, 25, 98
software, 63–64, 105–108
software, use of, 63, 108
timing of thank-you letters, 103, 105, 141
Time management, 24. See also Scheduling and calendars
Tour of facilities, invitations to, 99, 114, 224
Training
board, 14, 255
codes for data entry, 76–77
major gift solicitations, 115, 131–132, 134–135
for phone-a-thons, 171, 282
software use, 73, 75
solicitation, 134–135
staff, 271–272
volunteers, 240, 278
Trusts charitable remainder annuity trusts, 210–211
charitable remainder trusts, 208
charitable remainder unitrusts, 208–210
wealth replacement trusts, 211–212
Turner, Willis, 168
Universities
alumni as prospects, 80
development staff, 274. See also Development staff
fundraising, 246–247
grants, 194. See also Grants
online, 247
trustee campaign, 246–247
Vendors as prospects, 82
Volunteers
and analysis of resources, 20
importance of, 8, 9
and major gift solicitations, 115–116, 117
as prospects, 4, 80–81
recruitment, 14–15, 44, 98, 261–262, 280
retention, 278, 280
roles, 279–280
selecting solicitors, 88–90
and solicitation of prospects, 84–88.
See also Prospects
telephone solicitations, 170–179, 179–180
training, 131–132, 134–136
Wealth replacement trust, 211–212
Website, fundraising through, 166–168
Weinstein’s Three Questions, 269
Wills, 205–206. See also Bequests.
Worthy of support, 12–15, 225