## Index

### A
- accountability, 160
- acknowledgements, 223–25
- administrative costs, 21
- advertising, 12–13
- Affinity cards, 13
- alumni publications, 12
- annual campaign communications, developing, 41–44
  - donor base, developing, 45
  - donor entry point, 44–45
  - donor recognition, 45–46
  - donors and volunteers, building relationships, 38–39
- evaluating, 261
- exercise: volunteer wish list, 35–36
- experience, benefits of, 51
- financial development program, 44–55
- fundraising, improving, 53
- large gifts, identify donors of, 48
- leaders, developing and training, 36–37
- leadership, discovering, 32–33
- mission, annual sharing of, 49–50
- mission, funding your, 30
- organization, explaining what it does, 40
- organizations, caring and known, 21–22
- organizations, good steward, 21
- organizations, respected, 20
- organizations that meet critical community needs, 20
- ownership, building, 31–32
- people, engaging them, 30
- philanthropy, culture of, 47–48
- philanthropy, encouraging, 30–31
- philanthropy, teaching, 31
- philanthropy, teaching the value of, 50–51
- pride and ownership, increasing, 54–55
- in the real world, 49
- roles campaigns play in nonprofit organizations, 29
- roles in, 22–27
Index

annual campaign (Continued)
  staff, keys to hiring great, 26–28
  staff leadership and management skills, 52–53
  staff members, 22–23, 25
  staff need to be friendly, 25–26
  staff success, keys to, 24–25
  summary, 55–56
  talent, identifying, 33–36
  tips and techniques, 40–41, 46–47,
    51–52
  volunteer leadership experience, developing, 52
  volunteers, 28–29
  where donors give, 20–22
annual fund program
  advertising, 12–13
  annual campaign, 2
  commemorative giving, 13
  door-to-door solicitation, 14
  email and instant messaging, 16
  federated campaigns, 11–12
  games of chance, 14
  grant proposal tips, 4–5
  grants, 2–3, 5
  live and learn, 4
  mass media, 15
  in the real world, 10–11, 15–16
  sales ventures, 13–14
  special events, 5–11
  special events, ten reasons for, 6
special events, things to do
  afterwards, 9–10
special events, things to think about, 7
special events prospect lists,
  building, 8–9
summary, 16–17
  telethons and radiothons, 15–16
annual support gifts, 48, 252
asking, 212–25
  annual support, 10 steps for,
    217–20
  making the request, 216
  for money, 212–14
  reminders and tips, 150, 154–55
  team, debriefing the, 221–22
  things to remember, 220–21
auction, 11

B
  billboard, 12, 42
blogs, 8–9, 94
board of directors
  campaign team, 173, 175, 175
    exhibit 6.4
  gift giving by, 249–50
  how many, 248–49
  raising money, 250
  solicitation, 174

C
  campaign brochure, 95–96
**Index**

- **campaign calendar**, 145, 146 exhibit 5.1
- **campaign chair**, 167–68
- **campaign director**, 167
- **campaign leadership**, 167–72
- **campaign planning and evaluation** about, 227–28
  - **annual campaign**, evaluating, 261
- **board of directors**, 248
- **board of directors**, how many, 248–49
- **board of directors’ gift giving**, 249–50
- **board of directors raising money**, 250
- **campaign, 1st month of**, 240–41
- **campaign, 2nd month of**, 241–42
- **campaign, deciding when to**, 230–31
- **campaign, month after**, 242–43
- **campaign information**, accuracy of, 258–59
- **campaign meetings**, 244–45
- **campaign plan**, creating an annual, 231–44
- **campaign start**, 1 month before, 238–40
- **campaign start**, 2 months before, 236–38
- **campaign start**, 3 months before, 235–36
- **campaign start**, 4 months before, 235
- **campaign start**, 5 months before, 234–35
- **campaign start**, 6 months before, 233–34
- **campaign start**, 7–8 months before, 231–33
- **campaign start**, 9 months before, 231
- **campaign support**, evaluation tool for, 267–68
- **campaign timeline**, 12 month, 231–44
- **collections/payment**, 257–58
- **exercise: objectives of annual campaign**, 228–29
- **gifts**, collecting, 257–58
- **gifts**, major, 252–53
- **gifts and pledges**, donor retention rate, 256–57
- **gifts and pledges**, new, 254–55
- **gifts and pledges**, new major, 255–56
- **gifts and pledges**, total, 254
- **money goals**, setting, 259–61
- **organizational objectives**, 228–30
- **organization position**, 248–54
- **in the real world**, 246
- **spirit factor**, 245–47
- **staff**, part-time, 251
- **staff and the annual campaign**, 251
Index

campaign planning and evaluation
(Continued)

staff campaign job description, 252
summary, 268–69
volunteer evaluation, 266, 268
volunteers and major gifts, 253–54

campaign readiness
about, 57–58
board of directors’ fundraising
passion, 69–70
board’s support of organization,
72–73
budget, developmental, 72
campaign goals and objectives, 75
campaign materials, 84–85
campaign preparations, 59–82
charitable funds, soliciting, 79
communication plan, 85–90
community support, 66–67
constituency, asking your, 73
donor and prospect cultivation, 73
events and meetings, 87–88

exercise: campaign challenges, 59
exercise: cost of raising funds, 65
exercise: key community supporters, 67
exercise: large gift handling, 62
exercise: organizational expenses,
64
exercise: organization’s finances, 63
exercise: organization’s uniqueness,
61

factors to consider before
campaign, 60–63
financial development committee,
70–71
financial development plan, 67–68
fundraising, best practices of, 80–81
fundraising, compelling reason for,
71–72
fundraising, recruiting help, 76–78
fundraising information, 74
fundraising plan, 67
fundraising process, 75–76
gift cultivation, 84
gift stewardship, 81–82
office systems, 82–84
operational budget, 63–65
organization’s identity, 60
planning, why it is important,
68–69
postcampaign evaluation, 89–90
prospect ranking, 74
in the real world, 77
resource utilization, 63
staff members, enlisting capable, 89
staff who manage information,
79–80
strategic plan of organization,
60–61
strengths and weakness, 65
summary, 90–91
Index

timing, critical, 88–89
winning attitude and belief, 79
campaign teams
board component, 173, 175, 175
  exhibit 6.4
board solicitation, active, 174
campaign chair, 167–68
campaign director, 167
campaign leadership, 167–72
community gifts, 179–91, 180
  exhibits 6.8–6.9
electronic component, 181, 183–85
major gifts component, 176, 178,
  178 exhibits 6.6–6.7
phone-a-thon, 189–90
in the real world, 170, 181–83
staff campaign, 171–73, 172
  exhibits 6.2–6.3
staff component, 169–71, 173
summary, 191–92
team structure, 165–66
telephone aspect, 186–91
$250,000 campaign breakout, 177
  exhibit 6.5
capital gifts, 48
casino nights, 14
charitable funds
  asking for, 213
  high margin programs, 30
need for, 20
raising, 17, 20, 59, 65, 71, 75, 125,
  136, 166, 173, 191, 194
steward of, 28
charitable messaging, 56
cheerleaders, 138–39
cockroach races, 14
collection/payments, 257–58
Combined Federal Campaigns, 11
commemorative giving, 13
communication plan, 41–44, 86
community
  activists, 140
  funding benefits, 102
gifts, 179–91, 180 exhibits 6.8–6.9
  issues, 94–95, 97–99
  recipients, 139–40
  service, 53
complimentary tickets, 8
constituency, 122–25
corporate appeals, 1
corporate sponsors, 6, 9

D
development team, 30, 70
direct mail, 1, 16, 188
donor(s)
  acknowledgements, 223–25
  base, developing, 45
  building relationships with, 38–39
  entry point, 44–45
  key, 25, 82, 167
  recognition, 45–46, 85, 224
  recognition boards, 242
  recognition process, 266

275
Index

donor(s) (Continued)
retention rate, 256–57
thank-you letters, 222
where they give, 20–22
why they give, 54–55
donor cultivation
campaign readiness, 73
cultivation ranking scale, 207
large gifts and, 202
process of, 199–200, 207–9
ranking scale, 207
relationship building, 193–95, 203–6
stewardship as, 32
when is it completed?, 209, 211
door-to-door solicitation, 14

E
Earth Share, 1, 88
email notifications, 8
event committees, 10
exercises to identify
attributes of the organization,
unique, 61, 104
benefits of community funding,
102
campaign challenges, 59
cheerleaders, 139
community activists, 140
community involvement, 97
community issues, 98
community leaders, 131
community programs and services,
102
community recipients, 139–40
community support for campaign,
98
compassionate people, 133
cost of raising funds, 65
follow-up people, 138
goal oriented people, 136
high impact changes achieved,
103
influential people, 136
key community supporters, 67
key messages of campaign, 107–9
knowledge of your best friend,
195–97
large gift handling, 62
largest organizational expenses, 64
networking people, 137
objectives of annual campaign,
228–29
organizational changes from
campaign, 100
organizational leaders, 130
organization’s finances, 63
organization’s unique program/
service delivery, 105
passionate and committed people,
122, 131–32
programmatically connected
people, 142
Index

programs, services or activities, 66, 101
reasons money is needed, 104
retired people, identifying, 143
senior managers, 141
stories illustrating passion, 106
visionary people, 134
volunteer wish list, 35–36
well organized people, 132–33
well-resourced people, 141
well spoken people, 135

F
family foundations, 2–3, 202, 205
federal government, 2
federated campaign, 1, 11–12, 17
financial development
committee, 70–71
organization plan, 61
people and success of, 66–67
philanthropy and, 44
plan, 67–68
program, 44–55, 61
fundraiser(s)
board member as, 32
board members as, 250
characteristics of, 130–34
identifying potential, 35–36
listening skills, 216
passion of the, 123
people’s confidence as, 53
recognition of donors by, 223
skills, 34
fundraising
best practices, 80–81
compelling reason for, 71–72
costs, 2
help, recruiting, 76–78
improving, 53
information, tracking, 74
plan, 67

G
gambling, 14
gifts and pledges
about, 254–57
collecting, 257–58
collection rate of, 257
cultivation, 84
major, 252–53
new, 254–56
retention rate for, 256–57
stewardship, 81–82
total, 254
grant proposal tips, 4–5
grants, 2–3, 5

H
“hire attitude, teach skill,” 25

I
individual gift giving, 78
instant messaging, 16, 39
Internet fundraising, 1
Index

J
Jerry Lewis Labor Day Muscular Dystrophy Telethon, 15
job descriptions
campaign chair’s, 146–47 exhibit 5.2
campaign division chair’s, 147–48 exhibit 5.2
campaigner’s, 149–50 exhibit 5.2
campaign team leader’s, 148–49 exhibit 5.2
volunteer gift giving, 145

L
large gifts, 39
asking for, 47–48, 249
benefit of cultivation efforts, 202
as campaign goal, 176
how used, 62
influential volunteers and, 201
reasons for, 78
reluctance to give, 195
wealthy people and, 141–42
leaders
community, 131
developing and training, 36–37
organizational, 130–31
leadership
campaign, 167–72
developing and practicing, 126–27
discovering, 32–33
management skills and staff, 52–53
volunteer experience, 52
Lions Club, 33
local media, 8
local newspaper, 9
long-term
employees, 170
funding, 3
fundraising program, 17
goals, 26
importance, 119
performance objectives, 71
relationships, 78
sustainability, 12, 135
volunteers, 78

M
making a difference, 126
mass media, 15
MasterCard, 13
mission
funding your, 30
of organization, 126
oriented work, 20, 56
statement, 60, 86, 98

N
networking, 8, 24, 39, 88, 127–28, 143
newsletter
advertising campaign, 12
announcements of gifts, 222
articles in, 46
Index

cultivation process, 207, 211

donor communication, 74

letters to past donors, 234

prospecting by, 8

recipients, 42

report on last campaign, 236

for special events, 9

newspaper advertisement, 12

nonprofit organization(s)

board’s support of, 72–73

caring and known, 21–22

community needs and, 20

explaining what it does, 40

finances, understanding, 63

good steward, 21

good stewards, 21

identity of, 60

mission of, 126

plan, 61

position, assessing your, 248–54

respected, 20

roles campaigns play, 29

strategic plan of, 60–61

unique attributes of, 61, 104–5

what they do, 40

leaders, 130–31

objectives, 228–30

position, 248–54

overhead costs, 21, 64

ownership building, 31–32

philanthropic support, 16, 19, 201

philanthropy

culture of, 47–48

encouraging, 30–31

teaching value of, 31, 50–51

phone-a-thon, 189–90

physical plant improvements, 48

politicians, 9, 33

postcampaign evaluation, 89–90

pride and ownership, 54–55

professional staff, 23

prospects. See also donors

ranking, 74

where to look for, 200–203

public relations, 2, 8, 30, 33, 85, 180, 213

radiothon, 15

real world

annual campaign, 49

annual fund program, 10–11

campaign planning and evaluation, 246

campaign readiness, 77
real world (Continued)
campaign teams, 170, 181–83
relationship building and gift requests, 220
recognition
boards, 242
donor, 45–46
gift giving and, 85
process, 266
retention and, 224
recruitment
basics, 157–62
call, preparing for, 145–57
call script, 145
meeting, 154–55
plan, 10 tips for building, 150, 161–62
progress, monitoring, 161
responsibility, 160–61
relationship building
about, 124–25
chance interactions, 197
communication and, 152
donor cultivation, 193–95, 203
information, 154
pledge card and, 156
process, 47
with prospects, 144
techniques for, 206
relationship building and gift requests
acknowledgements to donors and volunteers, 223–25
asking, 10 steps for annual support, 217–20
asking, things to remember about, 220–21
asking, tips on getting a meeting, 215–16
asking bring more than just money, 212–14
asking request, making the, 216
asking team, debriefing the, 221–22
donor cultivation, when is it completed?, 209, 211
donor cultivation and relationships, 193–95, 203–6
donor cultivation process, 199–200, 207–9
donor cultivation ranking scale, 207
donors, how well do you know them?, 195
donors/prospects, cultivating, 206–7
donors/prospects, planning next steps for, 222–23
donor thanks, 225
exercise: knowledge about your best friend, 195–97
key points to remember, 199, 202
listening, 216
prospects, where to look for, 200–203
in the real world, 220
summary, 225–26
Index

tips and techniques, 214–15
visit, follow-up after the, 221–23
retention rate, 256–57
Rotary Club, 33

S
sales ventures, 13–14
senior managers, 140–41
special events
about, 5–11
prospect lists, 8–9
ten reasons for, 6
things to do afterwards, 9–10
things to think about, 7
spirit factor, 245–47
staff
annual campaign and, 251
campaign building, 171–73, 172
exhibits 6.2–6.3
campaign information managing, 79–80
component, 169–71, 173
job description of, 252
keys to hiring great, 26–28
leadership and management skills, 52–53
members, 22–23, 25, 89
need to be friendly, 25–26
part-time, 251
responsibilities, 23
success, keys to, 24–25
State Employees Campaign, 11

steward(s)
“can you steward gifts appropriately?”, 81–82
of charitable funds, 28, 50, 55, 63, 78
of funds raised, 22
organizations that are good, 21
stewardship
of current donors, 26, 256
as donor cultivation, 32
practices in annual campaign, 46
stories illustrating passion, 106
story tellers, 32
strategic plan of organization, 60–61
support case
about, 93–94
annual support, developing case of, 94
campaign, how it will change the world, 98–99
campaign brochure, 95–96
changes achieved, 103
community funding benefits, 102
community issues, 94–95, 97–99
exercise: benefits of community funding, 102
exercise: community involvement by organization, 97
exercise: community support from campaign, 98
exercise: high impact changes achieved, 103
support case (Continued)

exercise: identify unique attributes of the organization, 104
exercise: key messages of campaign, 107–9
exercise: organizational changes from campaign, 100
exercise: organization’s unique program/service delivery, 105
exercise: possible community programs and services, 102
exercise: reasons money is needed, 104
exercise: responding to community issues, 98
exercise: stories illustrating passion, 106
exercise: supported programs and services, 101
funding of programs and services, 100–101
fundraising brochure, 111–14
messages appealing to heart and mind, 106–10
money, why it is needed now, 103–4
new programs supported by campaign, 101–2
organization, unique attributes of, 104–5
organizational efforts, lasting effects of, 99–100
stories illustrating passion, 106

T
talent identification, 33–36
team player, 27
telephone fundraising, 1
telephone solicitation, 16
telethons and radiothons, 15–16
testimonials, 40
thank-you letters, 222

U
United Way, 1, 11–12, 17, 88

V
Visa, 13
volunteer(s)
about, 28–29
acknowledgements, 223–25
building relationships, 38–39
evaluation of, 266, 268
expectations of, 51
as great philanthropists, 129
leadership skills, 52
long-term, 78
major gift fundraising, 253–54
philanthropy, teaching the value of, 51
prospects lists, 145, 150 exhibit 5.3
questions before getting involved, 123–24
reasons people want to be, 126–30
recruitment information card, 150, 151 exhibit 5.4
welcoming letter for, 158 exhibit 5.6
wish list, 35–36
volunteer recruitment. See also job descriptions
about, 121
accountability, 160
annual support, soliciting, 155–57
asking, tips for, 150, 154–55
campaign calendar, 145, 146 
exhibit 5.1
cheerleaders, identifying, 138–39
community activists, identifying, 140
community recipients, identifying, 139–40
constituency, understanding your, 122–25
donor request, getting volunteer ready for, 144–45
donor request, information for the volunteer about, 143–44
exercise: identifying cheerleaders, 139
exercise: identifying community activists, 140
exercise: identifying community leaders, 131
exercise: identifying community recipients, 139–40
exercise: identifying organizational leaders, 130
exercise: identifying senior managers, 141
fundraisers, profile of, 130–45
giving as part of the job description, 129–30
helping others, feeling good about, 128–29
involvement, meaningful, 127
leaders, community, 131
leaders, organizational, 130–31
leadership, developing, 126–27
“making a difference,” 126
mission of organization, 126
networking opportunities, 127–28
performing, 143–45
personal meeting, 151–52
pledge card, 150, 152 exhibit 5.5
questions and responses, 149
in the real world, 134–35
recruiting basics, 157–62
recruiting call script, 145
recruitment call, 145–57
recruitment meeting, 154–55
recruitment plan, tips for, 150, 161–62
recruitment progress, monitoring, 161
recruitment responsibility, 160–61
volunteer recruitment. See also job descriptions (Continued)
relationships, building, 124–25
senior managers, 140–41
summary, 163
tips and techniques, 162–63
volunteer, reasons people want to, 126–30
volunteer, welcoming letter for, 158 exhibit 5.6
volunteer prospects lists, 145, 150 exhibit 5.3
volunteer recruitment information card, 150, 151 exhibit 5.4
volunteers, identifying compassionate, 133
volunteers, identifying follow-up, 138
volunteers, identifying goal-oriented, 135–36
volunteers, identifying influential, 136–37
volunteers, identifying networking, 137
volunteers, identifying passionate, 122, 131–32
volunteers, identifying programmatically connected, 142
volunteers, identifying retired, 142–43
volunteers, identifying visionary, 133–34
volunteers, identifying well organized, 132–33
volunteers, identifying well-resourced, 141–42
volunteers, identifying well spoken, 135
volunteers, questions before getting involved, 123–24
volunteers as great philanthropists, 129
winning team, being on a, 128

W
Web site, 8, 42, 85, 184
winning attitude and belief, 79