Index

Accountability, 28, 211, 212
Accountants
  as board members, 294, 304
  donation of services, 321
  planned giving, role in, 242
  review of gift-handling and gift-processing procedures, 28, 87, 123
Acknowledgments. See Thank-you letters and acknowledgments
Advice, asking for, 148
Advisory council, 129
Analysis and planning
  planned giving, 22
  resource development, 19–23
Annual campaigns
  mailing schedules, 165. See also Mail and e-mail fundraising
  request amount, 109, 110, 152
  and resource development, 34, 36, 44, 45, 47–49
Annual meeting, 118
Appointments
  with major gift prospects, 132, 143
  personal contact, importance of, 248, 250
  with prospective volunteer solicitors, 105, 106
  tips for getting, 144, 154
Association of Fundraising Professionals (AFP), 57, 58, 200
Attorneys
  as board members, 294, 296, 304
  donation of services, 321
  planned giving, role in, 234, 242, 294
  on prospect rating committee, 102
Baby Boomers, 9
Base of support, 6, 35, 40, 45, 46, 264, 265, 282
Board of directors
  accountants as board members, 294, 304
  and analysis of resources, 22
  attorneys as board members, 294, 296, 304
characteristics and qualifications of board members, 293–295
contact information of prospects, 96
and endowment campaigns, 312
giving policy, 300, 301
meetings, 16
motivation and involvement, 302, 303
nominating process, 295–300
pledge card, 138
prospects, 94, 95
recruitment, 300, 301
and respect for staff, 16
reets, 16, 303–313, 325
role of, 291, 292
size of, 292, 293
strengthening, 16
Breakfast meetings, 118
Budgets and budgeting
  development office budget, sample, 31–33
  fundraising budget, 29, 31–34
  fundraising program budget, 28
  monitoring, 40–44
  overall budget, 28, 29
  process, 29–31
  and resource development, 22, 23
  responsibility for, 29
Burn-out, 24, 285, 295, 323
Calendars. See Scheduling and calendars
Capacity to give
determining, 106–108
giving relative to means, 2, 3
and goal setting, 37
and prospect identification, 4, 95, 98, 268
and prospect rating, 99–110, 134, 275, 288
and tithing, 106
Index

**Capital campaigns**
- advancement phase (quiet phase), 273–276
- and annual campaigns, 47, 48
- arts institutions, 285
- characteristics of, 45, 46
- churches and synagogues, 282
- committee, 286
- community colleges, 283, 284
- cost effectiveness, 39
- factors for success, 259–264
- follow-up activities, 277, 278
- goal setting, 37–39. See also Goals
- hospitals, 283
- institutional differences, 281, 282
- intermediate phase, 276
- interview questions, 271, 272
- interview request letter, sample, 270
- major gifts, 133
- named gift opportunities, 128, 129
- organization and structure, 286–289
- planning study (feasibility study), 36, 268–270, 272, 273
- private schools, 284
- public phase, 276, 277
- readiness for (prestudy phase), 265, 267, 268
- request amount, 268, 275
- social service and youth groups, 285, 286
- steps for success, 264–278
- timeline for, 265, 266
- universities, 283

**Case for support.** See Case statements

**Case statements**
- brochures, 66, 67
- comprehensive formal case statement, 62–64
- fact sheets, 67
- formats, 65–71
- group presentations, 71, 72
- and major gift presentation materials, 138, 139, 141, 143, 145, 146
- market-specific, 65
- personalized, 66, 67, 139, 142
- and planned giving, 62
- purpose of, 61, 62
- and resource development, 19
- situation-specific, 65
- support for, gauging, 148, 149
- videos and DVDs, 67–71, 138
- writing, 64, 65

**Cause-related marketing**
- CB BBB Standards, 208, 211, 212
- overview, 207, 208
- sample agreement, 209–211

**Charitable gift annuities**
- described, 235
- sample agreement, two life, 256
- sample marketing plan for, 251–256

**Charitable remainder annuity trusts, 237, 238
Charitable remainder trusts, 236, 243, 247
Charitable remainder unitrusts, 236, 237

**Check-handling system, 87, 88, 123, 124
Churches and synagogues**
- capital campaigns, 281, 282
- as donors, 94, 285
- and leadership giving, 264
- pledge payments, 277
- regular giving and capital campaigns, 47, 48
- as source of prospects, 96
- strategic partnerships, 10
- tithing and capacity to give, 106

**Codes and coding**
- cultivation activities, 120
- promotion codes, 90, 162
- sort codes, 86, 90, 193
- type codes, 88–90, 94
- user-defined codes, 89, 90

**Codicil Club, 129
Codicils, 181, 234, 242, 243, 251
Collaboration, 10, 11
Colleges. See Universities

**Committees**
- capital campaigns, 286
- consultant selection committee, 326–330
- finance committee, 16, 29, 294
- nominating committee, 16, 265, 295–303
- planning committee, 269
- planning study committee, 269
- prospect rating committee, 102, 103
- resource development, 16, 267

**Community Relationships Survey, 94
Comprehensive campaigns, 48–50
Confidentiality**
- ethics, 58
- planning study interviews, 36, 268
- rating prospects, 102, 322
- and use of coding systems, 102

**Constituents as prospects, 94
Consultants**
- contracts with, 330
- and planned giving, 325
- and planning studies, 35, 36
- prospect screening services, 111
- recommendations, implementing, 330, 331
- role of, 323–326
- selecting, 326–330

**Corporate reports as prospect information source, 108, 111
Correspondence. See Letters; Thank-you letters and acknowledgments

**Council for Advancement and Support of Education (CASE), 57, 58
Council of Better Business Bureaus, Inc. (CB BBB), Standards for Charitable Solicitations to Cause-Related Marketing, 208, 211, 212
Covey, Stephen R., 146
Credibility, 28
Current gifts and planned giving, 232, 233
Development director
- budget responsibilities, 29
and capital campaigns, 273
contribution processing and acknowledgments, 123
and goal setting, 37
and growth of organization, 315, 316
hiring, 313, 315, 317–319
job description, 313
and planned giving professionals, working with, 242
and public relations duties, 53
qualifications, 313–315
role of, 50
Development staff
and analysis of resources, 22
goals and expectations, 313, 314
and growth of nonprofit, 315, 316
hiring process, 317–319
job descriptions, 313
large offices, special issues related to, 54, 55
and major gift solicitations, 132
performance appraisals, 320
planned giving, 53, 54, 178
as prospects, 95, 96
qualifications and skills required, 314, 315
and respect for board members, 16
retention, 319, 320
roles and responsibilities, 24–26
small offices, special issues related to, 50, 53, 54
training, 313
Donor acquisition programs. See also Prospects
mailings, 157–161, 167, 177
and planned giving, 40
purpose of, 40
telephone solicitation, 197–200
Donor education and planned giving, 240–251
Donor walls, 128, 129
Donors
acknowledgment, 119, 121, 123–130. See also Thank-you letters and acknowledgments
benefits for various gift categories, 124, 125, 141.
See also Gift clubs
capacity to give. See Capacity to give
current donors as prospects, 95, 96
and fundraisers. See Fundraising
history, 20, 21
lapsed donors as prospects, 96
motives for giving, 1, 2
people give to help people, 1, 2
personal relationships with, 6
planned giving. See Planned giving
prospects. See Prospects
records, 20. See also Record keeping
and relationship building, 24
respect for, 6
tour of facilities, 114
type codes, 88–90, 94
types, 93, 94
and use of contributions, 28, 29
Drucker, Peter, 25

Dunlop, David, 120, 121
80/20 rule, 5, 6, 24
Embezzlement, 87, 123, 124
Endowment campaigns. See also Capital campaigns
and board members, 312
campaign organization and structure, 286–289
and case statements, 62, 260. See also Case statements
characteristics of, 45–46
and comprehensive campaigns, 48–50
consultants, role of, 324. See also Consultants
factors for success, 259–264
and institutional differences, 281–286
and major gift fundraising, 132, 133. See also Major gifts
as method of building endowments, 279–281
request amount, 268, 275
Endowment funds
and budgeting, 30, 34
campaigns. See Endowment campaigns
goals, 20
methods of building, 279–281
operating foundations, 216
and planned giving, 232, 250–251, 259, 279, 281, 310
Ethics
and confidentiality, 102. See also Confidentiality
and resource development, 55–58
telephone callers, compensation, 198, 200
Evaluation and monitoring
budget, 29
donors and prospects, 54, 56
evaluation form for planned giving, 345, 346
financial development self-assessment form, 337–350
need for, 333, 334
and resource development, 58, 59
self-test form, 335, 336
Feasibility study. See Planning study (feasibility study)
Feedback
community perceptions, 16
staff members and performance appraisals, 320
Filing systems, 90, 91
Finance committee, 16, 29, 294
Finance office and record keeping, 87, 88
Financial information as part of major gift presentation materials, 139, 141
Focus groups, 16, 118, 274
Foundation Directory, 217–219
Foundations
Foundation Directory, 217–219
Grants Index, 111, 217
reports and directories as source of prospect information, 111
researching, 217–222
types of, 215–217
Friendraising
activities, 113–120
donor acknowledgment. See Thank-you letters and acknowledgments
importance of, 113
moves management, 120, 121
relationship building and nurturing, importance of, 24
and targeted communication, 82, 83, 85
Fundraising strategies
analysis of, 22, 85, 86
cost effectiveness, 39, 40
dedicated fundraising software, use of, 74, 75
types of, 44–50
Gift clubs
major gifts, 133, 141
planned-giving societies, 129, 250, 257
Goals
capital fund drive goal, 20
development staff, 313, 314
endowment goal, 20
fundraising, 24, 34–39
Grants
applications, 224–228
cost effectiveness, 39
defined, 214
foundations, 215–222. See also Foundations
government grants, 214, 215
letter requesting information, sample, 221
myths, 213
project development, 221, 223, 224
reporting requirements, 228, 229
thank-you letters, 228
Grants Index, 111, 217
Hospitals
capital campaigns, 263, 283
donor lists as source of prospects, 96
endowment campaigns, 280
public relations, 164
staff solicitations, 274
strategic partnerships, 10
Informal get-togethers, 118
Information system
acknowledgments, 74–76, 121
backups, 91
and capital campaigns, 267
communications, 74, 82–86
consultants, role of, 325
data integrity, 88–90
database maintenance, 86–90
dedicated fundraising software, generally, 73, 74
donor information, 74, 121
filing systems and procedures, 90, 91
flags, 90, 193
functions of, 73, 74
fundraising strategies, support of, 74, 75
giving history, 97
management buy-in, 73, 85, 86
phoning forms, 193, 194
procedures and data entry, 87
promotion codes, 90, 162
record keeping, 74, 86, 87
reports, 73, 74, 76–83
software selection, 85–87
sort codes, 86, 90, 193
type codes, 88–90, 94
user-defined codes, 89, 90
Information technology. See also Information system
budget analysis, 22, 23
and record keeping, 20, 21. See also Record keeping
and trends affecting nonprofits, 9
Internal controls, 28, 123, 124
Interview, major gift solicitation
case for support, stating, 145, 146
closings, 150
involvement, encouraging, 146–148
rapport, building, 145
responding to prospect’s answer, 151–153
response, waiting for, 151
steps, overview, 144, 145
summarization, 148–150
Lawson, Douglas M., 150
Legacy League, 129, 250, 257
Letters. See also Mail and e-mail fundraising;
Thank-you letters and acknowledgments
appeal letter, 168–171, 196
automated, 75, 76, 121
capital campaigns, sample letter requesting interview, 270
friendraising, 83
grants, thank-you letters, 228
major gift appeals, 141, 142
major gift thank-you letters, 119, 153
personalized, 76, 82, 83, 85, 93, 119, 121, 126, 141, 142, 161
phone-a-thon follow-up letters, 187
phone-a-thon thank-you letters, 188, 194, 195
phone-a-thon volunteers, 189, 190
planned giving thank-you letters, 255, 256
reference letters, 319
request for proposals, 326, 327, 330
requesting foundation publications and general information, 220, 221
response to request for more information, 251, 254
signing, 76
to study participants, 269, 270
thank-you letters, timing of, 28, 76, 119, 121, 277
Lettershops, 177–180. See also Mail and e-mail fundraising
Listening, importance of, 145–147, 149, 151
Luncheons, 118

Mail and e-mail fundraising. See also Information system
annual fund drives, 45
appeal letter, 168–171
brochures, 66
budgeting for, 28–34
capital campaigns, 45
case statement contained in, 64
combined with phone program, 23
comprehensive campaigns, 48
cost effectiveness, 39
design elements, 167
donor acquisition mailings, 157–161
e-mail addresses, 86, 88, 114
e-mail campaigns, 181
closures, 173, 174
frequency of, 164–166
informational mailings, 114
lapsed donors, 96, 163, 164
mail houses, 177–180
mail lists, 5, 85, 86, 91, 114, 174–177
mail preparation, 177, 178
newsletters as part of direct mail program, 180, 181
outside envelope, 167, 168
postal regulations, 180
and public relations, 164
renewing and upgrading support, 161–163
response forms or devices, 170–172
return envelope, 172, 173
return on investment, 1666
solicitor, 143
small organizations, 53
software, 74, 75. See also Information system
test mailings, 23, 166, 167
timing of, 50, 164, 165
websites, use of, 181–183
Mail houses, 177–180. See also Mail and e-mail fundraising
Mailings, informational, 114
Major gifts
appointments, getting, 144
benefits of major gift program, 131
call report forms, 140
capital campaigns, 133
cost effectiveness, 39
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
donor acquisition mailings, 157–161
research on prospects, 134
request, 141, 142
solicitation interview, 144–153
soliciting, persons responsible for, 132
special projects, 132, 133
sponsorships, 132
thank-you letters, 119, 153
timing of solicitation, 136–138
training and role-playing, 153–155
Marketing plan for charitable gift annuities, sample, 251–256
Meetings
annual meeting, 118
board of directors, 16
breakfasts and luncheons, 118
Mergers, 10, 11
Minimarketing, 82, 83, 85
Mission
importance of, 2, 14, 15
mission statement, 12
mission statement exercise for retreats, 307, 308
Motivation
board members, 302–304, 310
philanthropic, 110
and role of development professionals, 26
staff, 320
volunteers, 186, 194, 197
Moves management, 120, 121
Naming rights and named-gifts, 29, 128, 129
National Association of Independent Schools (NAIS), 57, 58
National Committee on Planning Giving (NCPG), 57–58
Net contributed income
and acquisition mailings, 159
budget analysis and reports, 23, 41–43
and fundraising strategy analysis, 22
maximizing, 24, 25, 39, 50, 53, 59, 333
monitoring, 54, 59
and setting fundraising goals, 35
and strategic management, 11
Newsletters
and friendraising, 113, 114
as part of direct mail program, 180, 181
planned giving, appeals for, 114, 181
90/10 rule, 5, 6
Nominating committee, 16, 265, 295–303
Nonprofit sector
charitable contributions, sources of, 8
economic impact, 8
importance of, 7, 8
trends affecting, 9, 10
Objections, responding to, 147, 148
Pareto’s rule (80/20 rule), 5, 6, 24
Phone-a-thons
ad-hoc volunteer phoning, 196, 197
confirmation letter to volunteer, sample, 190
Phone-a-thons (Continued)
forms, 193, 194, 196
and mail campaign coordination, 196
managing, 194–196
planning for, 186, 187
scripts, 190, 192, 193
tips for callers, 190–192
volunteer recruitment, 188, 189
volunteer scheduling form, 189
Thank-you letter, sample, 195
timeline, 187, 188
Tips for callers, 190–192
planned giving
accountants, role of, 242
and age of organization, 316
alliances for promoting, 10
analysis and planning, 22
attorneys, role of, 294
and case statements, 62
charitable gift annuities, 233, 251–256
charitable remainder annuity trusts, 237, 238
charitable remainder trusts, 236, 243, 247
charitable remainder unitrusts, 236, 237
committee, 241, 242
and comprehensive campaigns, 48–50
consultants, 325
cost effectiveness, 39
current gifts, 232, 233
defined, 231
donation of, 321
and development staff, 53, 54, 178
and donor acquisition programs, 40
and donor education, 240–250
and donor recognition, 126, 129
donor recognition, 126, 129
endowment funds, 250, 251, 259, 279, 281, 310.
See also Endowment funds
gift clubs, 129, 250, 257
importance of, 231, 232
marketing plan for charitable gift annuities, sample, 251–256
National Committee on Planning Giving (NCPEG), 57, 58
newsletter appeals for, 114, 181
officers, 315, 316
opportunities, 9
planned-giving societies (gift clubs), 129, 250, 257
real estate, 240
and resource development committee, 16
wealth replacement trusts, 238–240, 243
will and trusts, 233–235
Planned-giving societies (gift clubs), 129, 250, 257
Planning study (feasibility study)
capital campaigns, 36, 268–270, 272, 273
committee, 269
consultants, use of, 36
and goal setting, 35, 36
Plaques, 124–128, 257
Pledge cards, 138, 139, 152, 153
Policies and procedures, 28
Postal regulations, 180
Pre-campaign planning study. See Planning study (feasibility study)
Principles of fundraising
80/20 rule and trend toward 90/10, 5, 6, 24
balance, need for, 6
people give relative to their means, 2, 3
people give to help people, 1, 2
right person, right prospect, right amount, right project, right time, right way, 4, 5
those closest to organization set the pace, 4
Professional services, donation of, 321
Prospects
affluent individuals with close relationship to organization members, 97
board members as, 94, 95
classes of donors, 93, 94
constituents, 94
current donors, 95, 96
donor acquisition programs, 40. See also Donor acquisition programs
donors to similar organizations, 96, 97
and friendraising. See Friendraising
lapsed donors, 96
major gifts, 134. See also Major gifts
opinions, asking for, 118
rating and evaluation, 99–110
research, 97, 98, 110, 111, 134, 267, 268
staff as, 95, 96
team visits, 105
tour of facilities, 114
tracking form for prime prospects, 122, 123
use of information on, 111
vendors, 96
volunteer as, 95
Public relations, 53, 114, 157, 164, 208, 292, 294, 303
Rating prospects
capacity to give, determining, 106–108. See also Capacity to give
committee, 102, 103
Compiled Prospect Rating Form, sample, 104
cover page for rating forms, sample, 99
donor recognition, 126, 129
endowment funds, 250, 251, 259, 279, 281, 310.
See also Endowment funds
gift clubs, 129, 250, 257
importance of, 231, 232
marketing plan for charitable gift annuities, sample, 251–256
National Committee on Planning Giving (NCPEG), 57, 58
newsletter appeals for, 114, 181
officers, 315, 316
opportunities, 9
planned-giving societies (gift clubs), 129, 250, 257
real estate, 240
and resource development committee, 16
wealth replacement trusts, 238–240, 243
will and trusts, 233–235
Planned-giving societies (gift clubs), 129, 250, 257
Planning study (feasibility study)
capital campaigns, 36, 268–270, 272, 273
committee, 269
consultants, use of, 36
and goal setting, 35, 36
Plaques, 124–128, 257
Pledge cards, 138, 139, 152, 153
Policies and procedures, 28
Postal regulations, 180
Pre-campaign planning study. See Planning study (feasibility study)
Principles of fundraising
80/20 rule and trend toward 90/10, 5, 6, 24
balance, need for, 6
people give relative to their means, 2, 3
people give to help people, 1, 2
right person, right prospect, right amount, right project, right time, right way, 4, 5
those closest to organization set the pace, 4
Professional services, donation of, 321
Prospects
affluent individuals with close relationship to organization members, 97
board members as, 94, 95
classes of donors, 93, 94
constituents, 94
current donors, 95, 96
donor acquisition programs, 40. See also Donor acquisition programs
donors to similar organizations, 96, 97
and friendraising. See Friendraising
lapsed donors, 96
major gifts, 134. See also Major gifts
opinions, asking for, 118
rating and evaluation, 99–110
research, 97, 98, 110, 111, 134, 267, 268
staff as, 95, 96
team visits, 105
tour of facilities, 114
tracking form for prime prospects, 122, 123
use of information on, 111
vendors, 96
volunteer as, 95
Public relations, 53, 114, 157, 164, 208, 292, 294, 303
Rating prospects
capacity to give, determining, 106–108. See also Capacity to give
committee, 102, 103
Compiled Prospect Rating Form, sample, 104
cover page for rating forms, sample, 99
donor recognition, 126, 129
endowment funds, 250, 251, 259, 279, 281, 310.
See also Endowment funds
gift clubs, 129, 250, 257
importance of, 231, 232
marketing plan for charitable gift annuities, sample, 251–256
National Committee on Planning Giving (NCPEG), 57, 58
newsletter appeals for, 114, 181
officers, 315, 316
opportunities, 9
planned-giving societies (gift clubs), 129, 250, 257
real estate, 240
and resource development committee, 16
wealth replacement trusts, 238–240, 243
will and trusts, 233–235
Planned-giving societies (gift clubs), 129, 250, 257
Planning study (feasibility study)
capital campaigns, 36, 268–270, 272, 273
committee, 269
consultants, use of, 36
and goal setting, 35, 36
Plaques, 124–128, 257
Relationship building and nurturing, importance of, 24. See also Friendraising

Reports
attention-directing, 79–83
cash-flow projection, 79, 80
contact management, 83
filing systems, 90, 91
follow-up dates, 79, 83
net contributed income, 23, 41–43
problem-solving, 79, 82
scorekeeping, 76–79
software, 74, 76–83
solicitation analysis of fundraising methods, 79, 82, 84
solicitor reports, 79, 81, 82
Request amount
and capacity to give, 106–108. See also Capacity to give
capital and endowment campaigns, 268, 275. See also Capital campaigns; Endowment campaigns
determining, 100, 106, 108–110, 134
and fundraising goals, 34, 37
major gifts, 141–143, 153, 154
personalizing, 5, 172
and prospect rating, 103
and telephone solicitations, 191
Research
foundations, 217–221
prospects, 97, 98, 110, 111, 134, 267, 268
Resource development
analysis and planning, 19–23
annual campaigns, 34, 36, 44, 45, 47–49
and budgets, 28–34, 40–44
capital campaigns. See Capital campaigns
case for support, 19
committee, 16, 267
comprehensive approach, 49, 50
and dedicated fundraising software, 73. See also Information system
effectiveness, 19, 23–26, 39, 40
efficiency, 23, 26–28
endowment campaigns. See Endowment campaigns
ethics, 55–58
evaluation, 58, 59. See also Evaluation and monitoring
fundraising goals, setting, 34–39
hybrid fundraising modes, 47
and planned giving, 16. See also Planned giving
special projects, 46, 49
Respect
board and staff, 16
for donors, 6
Response cards, 167, 172, 178, 204, 248, 252
Response rates
annual fund drives, 45
appeal letters, 168, 171
and brochures, 174
and donor acquisition mailings, 158, 159
e-mail appeals, 183
and factors for success, 166
in-house mail lists, 165
and lapsed donors, 164
newsletters, 181
and phone-a-thon pledges, 195
and problem-solving reports, 79
and test mailings, 176
and timing of appeals, 50
Retired Americans, 9
Retreats, 16, 303–313, 325
Right person, right prospect, right amount, right project, right time, right way, 4, 5, 134
Scheduling and calendars
comprehensive approach to fundraising, 50–52
development professionals, 26
high-priority activities, 26, 27
relationship-building activities, 120
Segmentation, 45, 75, 83, 98, 161, 162, 165, 177, 252
Smith, G. Taylor (Bunky), 120, 121
Social and informative gatherings, 115–118
Software
analysis, 22
and capital campaigns, 267
consultants, role of, 325
cultivation process, 121–123
dedicated fundraising software, 73, 74. See also Information system
planned-giving software, 243
record keeping, 74
selection, 85–87
transferring data to new system, 21, 22
Special events
cost effectiveness of fundraising, 39
examples of, 201
planning for, 201, 204, 205, 207
and record keeping, 88
responsibility for, 202
selecting, 202–204
sponsorships, 132, 201, 204, 205
timeline, sample, 205–207
Special projects, fundraising for, 46, 49, 132, 133
Sponsorships, 88, 127, 128, 132, 201, 204, 205
Staff. See Development staff
Statistics on giving, 36, 37
Strategic management, 11–14
Strategic partnerships, 10, 11
Strategy, 6. See also Fundraising strategies
Strengths, weaknesses, opportunities and threats (SWOT) analysis, 12
Suspects, 97, 101, 102
SWOT analysis, 12
Taylor, Suzanne, 181, 182
Team building, 26
Team visits, 105
360 INDEX

Telephone solicitation
- cost-effectiveness, 39, 186
- ethics, 198, 200
- methods, 186
- professional campaigns (paid callers), 197–200
- public perception, 185, 186
- volunteer phone-a-thons, 186–197

Thank-you letters and acknowledgments
- and check-handling system, 123, 124
- donor acknowledgment, 121, 123–130
- donor benefits, 124–128
- donor recognition program, 126
- grants, 228
- involvement opportunities, 129, 130
- major gift solicitations, 151–153
- newsletters and other publications, 119
- permanent recognition, 128, 129
- phone-a-thons, 195
- plaques, 124–128, 257
- prospects, 121
- software, 121
- software, use of, 74–76, 121
- telephone calls, 124
- thank-you phone calls, 124, 126
- timing of thank-you letters, 28, 76, 119, 121, 277

Time management, 26, 27. See also Scheduling and calendars

Tour of facilities, invitations to, 114

Training
- codes for data entry, 76
- major gift solicitations, 153–155
- software use, 87
- solicitation, 153–155
- staff, 313, 314
- volunteer telephone solicitations, 187, 188
- volunteers, 150, 276, 320

Trusts
- charitable remainder annuity trusts, 237, 238
- charitable remainder trusts, 236, 243, 247
- charitable remainder unitrusts, 236, 237
- overview, 233–235
- philanthropic foundations, 216
- wealth replacement trusts, 238–240, 243

Universities
- alumni as prospects, 94
- capital campaigns, 263, 283
- development staff, 316. See also Development staff
- endowment campaigns, 280
- grants, 214. See also Grants
- relationship-building activities, tracking, 48
- resource development, 316
- telephone solicitors, compensation, 198, 200.
  See also Telephone solicitation
- trustee campaign, 283

Vendors as prospects, 96

Volunteers
- and analysis of resources, 22
- importance of, 16, 17, 320
- and major gift solicitations, 132
- as prospects, 95
- recruitment, 322, 323
- retention, 323
- roles, 321, 322
- selecting solicitors, 103–106
- and solicitation of prospects, 103. See also Prospects

Web sites, fundraising through, 181–183

Weinstein’s Three Questions, 310

Who’s Who in America, 111

Wills, 233–235. See also Trusts

Worthiness of support, 14–17