Funding The Movement

Support
Recovery

Hope

Learning
Empowerment

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www.vocalvirginia.org
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5 Creative (And Low Cost) Ways to Thank and Recognize Your Donors • By Sandy Rees
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What is Social Justice Fundraising?

Social justice fundraising means using the same principles that guide your organizing and programming work to also guide your fundraising. This is what VOCAL strives to do.

This includes:

- Focusing on building relationships rather than on raising money.
- Valuing all donors, no matter how much money they give.
- Being mission-driven.
- Being supported by the communities you work in and accountable to them as well.
- Building leadership from the communities you work in, as fundraisers and as donors.
Wrestling with the Saber-toothed Tiger

By Ellen Moore Osborne

For many years, VOCAL has been funded primarily through government funds. We feel grateful and blessed beyond belief that our government is actually supporting our grassroots social change movement (most social change movements receive little or no government support). On the other hand, we are sometimes nervous at having “all our eggs in one basket.” In 2009, VOCAL took a new step forward and hired me as their very first Development Director.

Raising money for the consumer-run mental health movement is hard. I have been a professional fundraiser for many years, raising millions of dollars for national organizations, and believe that raising money for peer-run mental health services is the ultimate challenge. Extracting dollars from donors is like extracting teeth from a saber-toothed tiger: I can see the abundance of teeth, I am courageous enough to stick my hand in there, but those teeth are really rooted deep!

Laying the Groundwork

In my first six months of fundraising at VOCAL, we’ve had to lay some groundwork for appealing to potential donors. Here are the steps we took:

Database - We got our membership database cleaned up and instituted a new software system, called Donor Perfect (www.donorperfect.com), to keep track of members and donors. We use the online version since we are in several different offices and don’t want the information stored on one computer. This is how we will keep track of income coming in, and the program is compatible with our accounting system, Quickbooks (www.intuit.com).

Website - We realized that if we were going to send folks to www.vocalvirginia.org, our website needed to project a professional, cohesive image and to explain our mission clearly. A talented staff member put the new site together using a template-based system called Moonfruit (www.moonfruit.com).

Brochure - In addition to having a sharp-looking online presence, we need a basic brochure to send out to potential donors. An out-of-work graphic design student took our words and images and made a trifold brochure that explained what VOCAL is and what we do.

Credit Cards - We needed some basic functions added to our organization. We began to
accept credit cards for donations and books and set up an on-line store. Our bank put us in touch with their merchant services division for accepting credit cards.

**Online Store** - We used ZenCart (www.zen-cart.com) for our online store. All donations and purchases made online are redirected to our site (www.vocalsafelink.org) with an SSL certificate.

**Grant Tracking System** - We have also been working on acquiring funds through grants from private foundations. We have a few folks working on researching and writing grants. In order not to step on one another’s toes, we are using a Google Docs spreadsheet to keep track of what happens with each grant http://spreadsheets.google.com. All of us can access the same document and add to it because Google Docs, a free service, stores our documents online.

We list applications by foundation targeted and include these items in each listing: the application deadline date, the date the application is sent, the amount requested, who’s in charge of each grant, the name of the program for which we’re requesting money, the foundation’s website url, the amount of any grant received, the follow-up report due date, and the type/date of reports sent.

**Funding Research** – In addition to the funders listed in this guidebook, another way we have looked for funders is by finding similar nonprofit organizations and seeing which foundations give them funding. Usually this information is available in an organization’s annual report. If you wish to try this, you can search out the foundation on www.guidestar.org and download their most recent IRS 990 tax return form. By accessing the 990 forms of these private foundations, you can see how much they have in assets and which organizations receive their support. There will also be information contained in the forms about how and where to send grant proposals. In some cases, private foundations only give to pre-selected organizations, in which case the box “Check Here if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests.” This section can be found in Part XV, #2 on the 990 form. If they accept unsolicited proposals, this is where the name, address, and telephone number of the person to whom applications should be submitted can be found.

**Obstacles We’ve Encountered**

There are several things working against fundraisers for the peer led mental health recovery and wellness movement. We are supported by the government, and some funders only fund programs that don’t qualify for government funding. Some people feel that the government should be taking care of those who cannot support themselves, like people with mental health challenges, and that the rest of the world shouldn’t have to think about us. Don’t get me wrong; government funding is great, and we should all receive as much of it as we can responsibly invest to strengthen the social fabric in beneficial ways for all federal taxpayers. But government funding is often very restricted and doesn’t allow for creative, untested projects we might want to try.

There’s also a deep sense of pride in earning or acquiring your own funds for a project. That pride is like earning your first paycheck. I remember receiving my first paycheck as a teenager, after working long hot summer days at Kings’ Dominion amusement park. I spent all $170 of it on something I’d been wanting for a long time: a Pentax K-1000 camera. That camera was the tool that was going to change my future, and I owned my future because I worked for it. It was a much different feeling to learn to use that tool and to take care of it than it would’ve been had Mom and Dad just bought me the camera—which they probably would have done.

I believe another big obstacle to our fundraising is our segregation by income and education. Ironically, those who are most educated and enthusiastic about the consumer-run movement and its success are those who are least able financially to support the movement. Those of us who support our peers (and comprise the bulk of the movement) more than likely found recovery after being referred by a Community Service Board or other state or local mental health agency. In many cases, because we could not afford private providers, we were fortunate enough to be exposed to the recovery movement. We are the cheerleaders because we know this movement works. By the same token, though, since we are in an economic class that tends to use the “system,” we probably do not have a lot of disposable income to donate. We do not have the dollars to support deserving causes like VOCAL and peer-run support groups.

A person with a mental health diagnosis who is financially able to go to a private provider for years and years, spends literally thousands of dollars trying to feel better, might not hear of the “consumer
run movement.” They might not learn that recovery is possible. That’s why we’ve got to get the message out: not only is recovery possible, it’s for everyone. I repeat: Recovery is for everyone. You do not need to qualify as a low-income individual to help your friend who is feeling depressed, to attend a support meeting, or to create your WRAP plan. Mental illness affects every fourth person you meet, regardless of their income bracket.

We have no statistical data on the income of our membership in VOCAL. Because many people came to us through a community-based system, we are assuming they are not middle- to- high income. Perhaps we should be working on spreading the recovery movement to the owning class, whose members are likely to own a health-insurance policy and to be able to afford a private provider. It’s not their fault they haven’t been educated about the peer-run movement! Let’s introduce them! We know it works! In some cases, it works better than a $110/hour psychiatrist and a handful of pills; in some cases it can work alongside those things. Recovery should not be a class issue. The broken soul in me can touch the broken spirit within you, regardless of where we are on the economic ladder.

Here’s another catch to fundraising for our movement: if an organization is primarily consumer run, the usual expectation that board members will give financially to the organization don’t hold. Many nonprofit Boards of Directors have a “give or get” requirement: each member must either give a certain amount of dollars or get that amount from their friends. This may not be possible for board members in the peer-run movement. One of the things we’ve considered at VOCAL is to have a collective “give or get” requirement: collectively, the board will give or get $1000 this year. Framing the expectation in this way avoids singling out members who cannot meet the requirement individually.

We shouldn’t give up on fundraising for grassroots mental health recovery and wellness, though, just because it’s difficult. If all of us ask in a resounding chorus, perhaps the general population will get the idea this is a cause they need to support financially.

Fundraising Tactics We’ve Tried So Far

Trainings - In the first 6 months of fundraising with VOCAL we had a non-governmental income of approximately $20,000. About 75% of that income was raised for WRAP Facilitator Training by our Program Director John Otenesek from his personal contacts at Community Service Boards across the state. Because John has had collegial relationships with some of these CSB folks for years, and because Community Service Boards across the state see value in his program, some of John’s contacts will, at his request, sponsor individuals by covering the approximately $1700 tuition for participation in the training program.

Mailings to Our Members - In the fall of 2009, we sent a mailing to 800 members asking for donations. Specifically, we said our goal was to raise $1000 and asked every member to contribute $1.25. Seventeen members who were neither board nor staff contributed, with gifts ranging from $1.25 to $150, creating a total of $629.50. Another push toward the goal via two bulk emails netted another $125, with those gifts ranging from $5 to $100. Various staff members and board members pitched in the rest to make the $1000 goal. From any other group, this would have been akin to the extraction of a baby tooth that was already hanging on by a thread. From the VOCAL membership, this $1000 was one of those big ‘ol canines!

Buying Mailing Lists - In addition to a fundraising mailing to the VOCAL membership, we conducted a direct-mail appeal to several mailing lists from which we rented names of donors living in Virginia: From NOZA (www.nozasearch.com) we received three responses totaling $175.

From the PESI list of attendees to mental health seminars (www.pesi.com) we received three responses totaling $145. From the Help Hospitalized Veterans Donors list, we received two donations
totaling $125. Our self-compiled “Prospect” list of 40 names of donors in our area yielded one response for $100. Our self-compiled “Provider” list of 40 names of mental health care providers in our area yielded two responses, for a total of $600 – our highest response rate.

Essentially, we spent over $6000 in direct mail costs to find 30 donors who gave us a total of about $1875. Now we will need to use some other techniques to encourage them to renew their gifts again and again. Maybe in several years we’ll break even!

**Foundation Grant Writing** - In the first six months of working at VOCAL, we have had seven grant applications rejected. Our proposals have mainly focused on funding art groups, capacity-building for VOCAL and for peer-run programs. We have 19 proposals and 7 “Letters of Inquiry” outstanding. We have had one successful grant application that brought in $500; many of this funding organization’s board members had personal relationships with the people of VOCAL. That fact makes me want to launch into a rant about how fundraising is all about relationships, but you probably had that lecture already.

Despite all this rejection we keep plugging away, trying to get the word out about VOCAL and recovery. We believe that the more people know about VOCAL and the good work we do, the more likely it is that saber-toothed tiger will let us have those teeth!
The ten most important things you can know about fundraising

BY KIM KLEIN

Many times at the end of a training or a speech about fundraising techniques and principles, I am asked, “What are the most important things to remember?” Usually the person asking is either a volunteer with little time to help with fundraising, a person new to fundraising and overwhelmed by the number of details she or he has to keep in mind, or a staff person who is not responsible for fundraising but wants to help.

Over the years, I have thought about what I consider the ten most important things to know about fundraising. The items are not presented in order of importance, although #1 is probably the most important; nor are they in order of difficulty. If there is any order, it is the order in which I understood these things and integrated them into my own fundraising work. Undoubtedly, other skilled fundraisers would have slightly different lists, but this list has served me well for many years. I hope you find it useful.

1. IF YOU WANT MONEY, YOU HAVE TO ASK FOR IT

While there are some people (may their kind increase) who will simply send an organization money or offer money without being asked, there are not enough of them to build a donor base around. Most people will not think to give you money unless you make your needs known. This is not because they are cheap or self-centered; it is because most people have no idea how much it costs to run a nonprofit, or how nonprofits get money. If you don’t ask them, they will simply assume you are getting the money somewhere. They have no reason to think your group needs money unless you tell them, the same way they have no reason to know if you are hungry, or unhappy, or needing advice.

Millard Fuller, who founded Habitat for Humanity, says, “I have tried raising money by asking for it, and by not asking for it. I always got more by asking for it.”

2. THANK BEFORE YOU BANK

Once you receive money, you must thank the person who gave it to you. I have found that disciplining myself not to deposit checks until I have written the thank-you notes has forced me to make thank-you notes a priority. I am not rigid about this rule because if I get behind in my thank-you notes, and then don’t deposit the checks for a while, the donors may wonder whether we really needed the money.

Thank-you notes do not need to be fancy and should not be long. If at all possible, they should include a personal note, even if it is from someone who doesn’t know the donor. You can add something as simple as, “Hope to meet you sometime,” or “Check out our website,” or “Happy holidays,” or even, “Thanks again — your gift really helps.”

Many organizations have created note cards for staff and volunteers to use when writing thank yous. The front of the card has the logo of the group, on the top half of the inside is a relevant meaningful quote from a famous person, and the bottom half of the inside is used for the thank-you message. It is a small space, so you really can’t say much.

Many databases will print out a thank-you note after you enter the information about the donor — saving valuable time. These are best if accompanied by a personal note at the bottom.

Late thank yous are better than no thank you at all, but photocopied form thank yous are almost the same as no thank you.

The long and the short of thank yous is: if you don’t have time to thank donors, you don’t have time to have donors.

3. DONORS ARE NOT ATMS

A survey of donors who gave away more than $5,000 a year asked, “What is your relationship with your favorite group?” Several gave similar answers, even though they did not know each other and did not give to the same
group. All the answers were on this theme: “I would love to be considered a friend, but I am more of an ATM. They come to me when they need money, they tell me how much, I give it to them, and the next time I hear from them is when they need more.”

This is a terrible indictment of much of what passes as fundraising. When I have described this common situation in trainings, people have often asked, “How can we make sure our donors don’t feel this way?” The answer is very simple, “Make sure you don’t feel that way about your donors.”

All groups have a few “high maintenance” donors, and may be forgiven for wishing them to go on a long trip to a place without phones or e-mail. But the majority of donors require practically no attention. They have the resilience of cacti — the slightest care makes them bloom. Thank-you notes, easy-to-understand newsletters, and occasional respectful requests for extra gifts will keep people giving year in and year out.

Think of your donors as ambassadors for your group. Design your materials so that donors will be proud to give your newsletter to a friend or recommend your group when their service club or professional association is looking for an interesting speaker, or forward your e-mails to several of their colleagues.

By treating your donors as whole people who have a number of gifts to offer your group, including their financial support, you will have more financial support from existing donors, more fun fundraising, more donors, and the peace of mind of knowing that you are not treating anyone as an object.

4. MOST MONEY COMES FROM PEOPLE, AND MOST OF THOSE PEOPLE ARE NOT RICH

There are three sources of funding for all the nonprofits in the United States: earned income (such as products and fees for service), government (public sector), and the private sector, which includes foundations, corporations and individuals. For the nearly 60 years that records about who gives money away have been kept, at least 80% of this money has been shown to be given by individuals.

In 2002, total giving by the private sector was almost $241 billion, and 84.2 percent of that ($202 billion) was given away by individuals! These people are all people — there is no significant difference in giving patterns by age, race, or gender. Income is not nearly the variable that one would think: middle-class, working-class and poor people are generous givers and account for a high percentage of the money given away. In fact, a study by Arthur Block of the Maxwell School of Citizenship and Public Affairs at Syracuse University showed that 19% of families living on welfare give away an average of $72 a year!

Too often, people think they can’t raise money because they don’t know any wealthy philanthropists. It is a great comfort to find that the people we know, whoever they are, are adequate to the task. Seven out of ten adults give away money. Focus your work on these givers, and help teach young people to become givers.

5. PEOPLE HAVE THE RIGHT TO SAY NO

One of the biggest mistakes I made early on as a fundraising trainer was not balancing my emphasis on the need to ask for money with the reality that people are going to say no. No one is obligated to support your group — no matter what you have done for them, no matter how wealthy they are, no matter how much they give to other groups, how close a friend they are of the director, or any other circumstance that makes it seem they would be a likely giver.

While it is possible to guilt-trip, trick, or manipulate someone into giving once, that will not work as a repeat strategy. People avoid people who make them feel bad, and they are attracted to people who make them feel good. When you can make someone feel all right about saying no, you keep the door open to a future yes, or to that person referring someone else to your group.

People say no for all kinds of reasons: they don’t have extra money right now; they just gave to another group; the don’t give at the door, over the phone, by mail; a serious crisis in their family is consuming all their emotional energy; they are in a bad mood. Rarely does their refusal have anything to do with you or your group. Sometimes people say no because they have other priorities, or they don’t understand what your group does. Sometimes we hear no when the person is just saying, “I need more time to decide,” or “I need more information,” or “I have misunderstood something you said.”

So, first be clear that the person is saying no, and not something else like, “Not now,” or “I don’t like special events.” Once you are certain that the person has said no, accept it. Go on to your next prospect. If appropriate, write the person a letter and thank them for the attention they gave to your request. Then let it go. If you don’t hear no several times a week, you are not asking enough people.

6. TO BE GOOD AT FUNDRAISING, CULTIVATE THREE TRAITS

A good fundraiser requires three character traits as much as any set of skills. These traits are first, a belief in the cause for which you are raising money and the ability to maintain that belief during defeats, tedious tasks, and financial insecurity; second, the ability to have high hopes and low expectations, allowing you to be often pleased but rarely disappointed; and third, faith in the basic goodness of people.
While fundraising is certainly a profession, people who will raise money for any kind of group are rarely effective. Fundraising is a means to an end, a way to promote a cause, a very necessary skill in achieving goals and fulfilling missions.

7. FUNDRAISING SHOULD NOT BE CONFUSED WITH FUND CHASING, FUND SQUEEZING, OR FUND HOARDING

Too often, organizations get confused about what fundraising is and is not.

If you hear that a foundation is now funding XYZ idea, and your organization has never done work in that area nor have you ever wished to do work in that area, the fact that you are well qualified to do such work is immaterial. To apply for a grant just because the money is available and not because the work will promote your mission is called fund chasing. Many groups chase money all over and, in doing so, move very far away from their mission.

Similarly, if your organization seems to be running into a deficit situation, cutting items out of the budget may be necessary but should not be confused with fundraising. When deficits loom, the fund squeezing question is, “How can we cut back on spending?”; the fundraising question is “Where can we get even more money?”

Finally, putting money aside for a rainy day, or taking money people have given you for annual operating and program work and being able to put some of it into a savings account is a good idea. Where savings becomes hoarding, however, is when no occasion seems important enough to warrant using the savings.

I know a number of groups that have cut whole staff positions and program areas rather than let money sitting in their savings be used to keep them going until more money could be raised. I know groups that overstate what they pay people, what price they pay for equipment, what they spend on rent, all to get bigger grants from foundations or larger gifts from individuals, and then put that extra into savings — savings that they have no plan for.

A group that saves money needs to have a rationale: Why are you saving this money? Under what circumstances would you spend it? Without some plan in mind, the group simply hoards money.

Fund chasing, fund squeezing, and fund hoarding need to be replaced with an ethic that directs the group to seek the money it needs, spend it wisely, and set some aside for cash-flow emergencies or future work.

8. FUNDRAISING IS AN EXCHANGE — PEOPLE PAY YOU TO DO WORK THEY CANNOT DO ALONE

Hank Rosso, founder of the Fund Raising School and my mentor for many years, spoke often about the need to eliminate the idea that fundraising was like begging. Begging is when you ask for something you do not deserve. If you are doing good work, then you deserve to raise the money to do it. What you must do is figure out how to articulate what you are doing so that the person hearing it, if they share your values, will want to exchange their money for your work. They will pay you to do work they cannot do alone.

9. PEOPLE’S ANXIETIES ABOUT FUNDRAISING STEM FROM THEIR ANXIETIES ABOUT MONEY

Anxiety about money is learned, and it can be unlearned. If you are ever around children, you know that they have no trouble asking for anything, especially money. In fact, if you say no to a child’s request for money, they will simply ask again, or rephrase their request (“I’ll only spend it on books”), or offer an alternative (“How about if I do the dishes, then will you give me the money?”).

Everything we think and feel about money we have been taught. None of it is natural; none of it is genetic. In fact, in many countries around the world, people talk easily about money. They discuss what they earn, how much they paid for things, and it is not considered rude to ask others about salaries and costs.

We have been taught not to talk about money or to ask for it, except under very limited circumstances. Many of us are taught that money is a private affair. Having too little or too much can be a source of shame and embarrassment, yet money is also a source of status and power. Most people would like to have more money, yet most will also admit that money doesn’t buy happiness.

As adults, we have the right — in fact, the obligation — to examine the ideas we were taught as children to ensure that they are accurate and that they promote values we want to live by as adults. Most of us have changed our thinking about sex and sexuality, about race, about age, illness and disability, about religion, about marriage, about how children should be raised, what foods are healthy, and much more. We have done this as we have learned more, as we have experienced more, or, as we have thought about what we value and what we do not. We need to take the time to do the same work with our attitudes toward money. We can choose attitudes that make sense and that promote our health and well-being.

Our attitudes toward fundraising are a subset of our larger attitudes toward money. The most important change we can make in our attitudes toward fundraising is to remember that success in fundraising is defined by how many people you ask rather than how much money you raise. This is because some people are going to say no, which has got to be all right with you. The more people you ask, the more yes answers you will eventually get.
Finally, if you are anxious about asking for money or would rather not ask, this is normal. But ask yourself if what you believe in is bigger than what you are anxious about. Keep focused on your commitment to the cause and that will propel you past your doubts, fears, and anxieties.

10. THERE ARE FOUR STEPS TO FUNDRAISING — PLAN, PLAN, PLAN, AND WORK YOUR PLAN

Though humorous, this formula that I learned from a community organizer underscores the fact that fundraising is three parts planning for one part doing. I learned this later in my career, after having gone off half-cocked into many fundraising campaigns and programs. I meant to plan, I planned to make a plan, I just never got around to planning.

I have learned (usually the hard way) that an hour of planning can save five hours of work, leaving much more time both to plan and to work. Planning also avoids that awful feeling of “How can I ever get everything done,” and that sense of impending doom. It moves us out of crisis mentality and means that we are going to be a lot easier for our co-workers to get along with.

There are a lot of articles and books on planning — I recommend reading some of them. However, the easiest way I have found to plan something is to start by defining the end result you want and when you want it to happen, then work backwards from that point to the present. For example, if you want your organization to have 100 new members by the end of next year and you are going to use house parties as your primary acquisition strategy, you will need to schedule five to seven house parties that will recruit 10 to 15 members per party.

To set up one house party will require asking three people to host it (only one will accept), which will require identifying 15 or 20 possible hosts to carry out the number of house parties you want to have. The hosts will want to see materials and know what help they will have from you.

The materials will have to be ready before the first phone call is made to the first potential host, and the first phone call needs to occur at least two months before the first party. So, the materials need to be produced in the next two weeks, hosts identified in a similar timeframe, calls made over a period of two or three months, and so on.

When you are tempted to skip planning, or to postpone planning until you “have some time,” or to fly by the seat of your pants, just remember the Buddhist saying, “We have so little time, we must proceed very slowly.”

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From the January/February 2004 issue of Grassroots Fundraising Journal
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All good fundraising plans have one thing in common: they show a diverse number of sources for their income. The board of directors plays a crucial role in selecting, implementing, and evaluating fundraising strategies. In addition to other ways that board members may participate in fundraising, they individually commit to raising and giving a certain amount of money, or commit to working by themselves on specific strategies with no financial goal attached.

It is a good idea for board members doing fundraising on their own to write up their plans. This “contract” allows staff to know when they might be called on to help, ensures that events don’t happen on the same day or the same donors aren’t solicited by several board members, and also helps to remind board members of their commitments.

In order for this method to work, the organization or the board fundraising committee should think of many specific ways board members could actually raise money by themselves. The fifty-three ways suggested below are not an exhaustive list, nor will they all work for every group. Few board members could use all fifty-three ways, but almost any board member should be able to use two or three of them.

All of these methods have been used by different volunteers in a wide variety of organizations. Some methods are much more popular than others. Some depend on access to certain resources.

Presenting board members with fifty-three ways that would work for your organization helps counter the excuse, “I would help but I just don’t know what to do.” Having each board member write out a plan, with goals and a timeline, also gives them a sense that if they do their best with this plan, they will have helped significantly. Many board members feel that fundraising is never ending, and that no amount of effort is enough. “Whatever I do, I could have done more and probably should have,” they say. This feeling of inadequacy leads to high turnover, burnout, and resentment in boards. Specific fundraising contracts can help avoid that result.

Following the description of the fifty-three ways board members can raise funds, there is a suggested format for a contract and examples of some completed contracts.
1. **Give it yourself.** This is the easiest way for those who are able, although if you are able to give this much money you should be helping to raise much more than $1000.

2. **List all your friends who are interested in your organization or similar organizations.** Decide how much you want to ask each one for. If you are not sure of an amount, use a range. Write to them on your own stationery, include a brochure from the organization and a return envelope. Phone those people who don’t respond in two weeks. Some people will need 10 friends to give $100, and some people need 50 friends to give $20. Most people will need a combination of gifts of $100, $50 and $25.

3. **Give part of the $1000.** Then ask your friends to join you in giving $50, $100, or whatever amount you gave. This is most effective because you are not asking them to do anything you haven’t done.

4. **Set up a challenge campaign.** Challenge gifts can be quite small. Tell people you’ll give $5 for every $25 they give, or will match every $50 gift up to ten gifts. For added suspense, make this challenge during a fundraising event. You or the host can announce, “We now have the Dave Buck-stretch Challenge. For the next five minutes, Dave will give $5 for every new member that joins Worthy Cause.”

5. **If your organization has several grassroots fundraising strategies in place, use them all:**

   - Sell 100 raffle tickets (@$2) .................. $200
   - Give $200 ...................................... $200
   - Sell 10 tickets to the annual event (@ $25) ........ $250
   - Buy two gift memberships (@ $25) ............... $50
   - Get 12 friends to join (@ $25) .................. $300

6. **Help with your organization’s phone-a-thon.** Bring the names of people you think would like to join and call until you have raised $1000. Or trade names with someone in the organization and call their friends until you have reached $1000. This is particularly effective for people who are shy about asking their own friends for money but are not afraid to ask people they don’t know.

7. **Acquire mailing lists for your organization.** If you belong to another group, perhaps you can set up an exchange, or perhaps you have access to a list of members of some other group. You can ask all your friends to give you the names of 10 to 15 people they think would like to join. You would need to recruit about 25 members at an average gift of $40. Depending on how “hot” your list is, you might need as few as 200 names (to do a bulk mailing) or as many as 1500-3000 (if you expect a 1–2% response). You would have to have a greater response if you wanted the mailing to pay for its costs and also generate $1000.

8. **Give the organization something they need that is worth $1000,** such as a new computer, filing cabinets, couch, software program, etc.

9. **Pledge $28 a month,** and get two others to do likewise.

10. **Teach a seminar on a topic you know:** fundraising, knitting, organic gardening, organizing, proposal writing, environmental impact reports, gourmet cooking, dog grooming, starting your own business. Charge $50-75 per person, with a goal of 15 to 20 people. Either absorb the cost of promotion, or have enough participants to cover it.

11. **Give some or a lot of things to your organization’s garage sale,** making sure they are worth $1000, and then help to sell them all.

12. **With four or five friends, have a spaghetti dinner at a temple, church or union hall or other big room with a large kitchen.** Charge $10 per person and feed more than 100 people. You can charge extra for wine or garlic bread, or for dessert.

13. **Have a fancy dinner at your home or a regular dinner at someone’s fancy home.** Serve unusual or gourmet food, or have special entertainment. Charge $40 or more per person, and have 25 or more guests.

14. **Get three friends to help you have a progressive dinner.** Start at one person's home for cocktails and hors d’oeuvres, progress to the next person’s house for soup or salad, the next person’s for the main course, and the last person’s for dessert. Either charge by the course or for the whole package. To make it extra special (and much more expensive), get a limousine for the evening that carries guests from house to house, or have live music at each site.

15. **Host a house party.** Do not charge admission and invite as many people as you can. During the party, give a short talk about your organization and ask everyone to consider a gift of $25, $50, $100 or more (depending on the crowd). Either pass out envelopes and ask people to give then, or after the party contact everyone individually who came and ask for a major gift. Indicate that you have given and, if appropriate, how much you have given.

16. **Get your gambling friends together.** Charge a $5 entrance fee and have a poker evening, asking that every “pot” be split with the organization. Individuals win and so does the organization. You can charge extra for refreshments, or include one or two glasses of something with the price of admission. (Watch the laws in your community on this one. In some communities it is illegal to gamble, even in your own home.)
17. Do one fundraising event every other month. This might look like:
- Poker Party: $200
- Fancy dinner (8 people $50): $400
- Sell 50 raffle tickets @ $2: $100
- Book sale: $200
- Recycle newspapers: $100

18. Solicit small businesses, churches, synagogues, or service clubs for $1000. If you are active in a church or own your own business and are involved in business organizations or service clubs, this can be very effective. You can often raise $200-$1000 with a simple proposal and oral presentation.

19. Take a part-time job in addition to your present work and give everything you earn up to $1000.

20. Ask five to ten people to save all their change for three to five months. You save yours. Count it at the end of the prescribed time and use one of the other methods to raise the rest. (You may not need to.)

21. Ask two to five friends to help you put on a bake sale, book sale, or garage sale. You and your friends bake the goodies or get the books or the other stuff required for the sale, staff it and clean up afterwards. This is an excellent way to get people involved in fundraising without ever actually asking them for money.

22. For the fairly rich: Give your organization $13,000 as an interest-free loan for a year. They invest it, earn 8%, and at the end of the year, they give your $10,000 back.

23. Sell your organization’s materials, buttons, T-shirts, bumper stickers, or whatever else they have for sale. Also, help distribute these to bookstores or novelty shops.

24. The Farming Out Method: Entice five friends to sell 100 raffle tickets at $2 each, or invite ten friends to raise $200 however they like. Share this list of suggestions with them. Give them a nice dinner at the successful end of their efforts (or a bottle of good wine, or a weekend away).

25. Get a famous or popular person to do a special event. Watch the costs on this, or you may lose money.

26. Invite people to your birthday party and ask that in lieu of gifts they give money to your organization.

27. Conduct a volunteer canvas. For one evening, you and a group of friends take literature to all the neighborhoods around you and ask for money at the door. Be sure to comply with city and county ordinances.

28. Lead or get someone to lead a nature walk, an architectural tour, a historic tour, a sailing trip, a rafting trip, or a horseback ride. Charge $15-$25 per person, or charge $35 and provide lunch. Advertise the event in the newspaper to draw in people from outside your organization.

29. Start a pyramid dinner, or a chain dinner. Invite 12 people and charge $12 each. Get two people of the twelve you invited to invite 12 people each at $12, and two people from each of those two dinners to have 12 people at $12, and so on. Here’s the income:
- Your dinner: $12 × 12 = $144
- From your dinner: $12 × (12 + 12) = $288
- From those dinners: $12 × (12 + 12 + 12) = $576
- From those dinners: $12 × (12 × 8) etc.

Twelve is used in this example because it worked very well for the Nuclear Freeze Campaign in California, which was Proposition 12. In many communities, most of the income for the campaign was generated by 12 × 12 dinners.

30. Collect cans for recycling. Ask all your friends to save their cans and bottles for you and turn them in to a buy-back recycling center.

31. Sell your frequent flyer miles to friends or donate them to the organization for a raffle. Watch the rules of the airline on this, but some airlines let you give away miles, and you may be able to sell your miles as long as you don’t go through a mileage broker.

32. If you live in a nice house or own a getaway cottage in a beautiful place or an expensive city, rent it out for a week or a weekend two or three times during the year and give the proceeds to your organization. Or rent a room in your home for much less than the cost of a hotel room to people needing a place to stay while they are on business in your city. You may even make a new friend in the process.

33. Organize a service raffle. Get four people (one can be you) to donate a simple but valuable service that many people could use and sell raffle tickets for $10-$20 each. Keep the price a little high so you don’t have to sell so many and so that the buyers have a higher chance of winning. Services can include childcare for a weekend or for any weekend night two weekends in a row; one day of housecleaning; yard work; house painting (interior or exterior), etc. Sell the tickets to neighbors, work mates and to other board members. Encourage people to buy several by offering discounts for multiple purchases, such as one for $10, 2 for $20, but 3 for $25, 4 for $35, 5 for $40. If you are really bold or live in a more affluent area, or have few friends, sell the tickets for $50 each. A full day of housecleaning for $50 is a real bargain, and buyers have a high chance of winning with fewer tickets sold.

34. Offer to do something your friends and family have been nagging you to do anyway and attach a price to it. For example, quit smoking on the condition that your friends donate to your group, or get your friends to pay a certain amount for every day you don’t smoke for up to 30 days. Agree to match their gifts at the end of thirty days if you didn’t smoke and to give...
them their money back if you did. (This method could be applied to other healthy behaviors, such as exercising or not eating sugar.)

35. Find out what items your group needs and try to get them donated. This is good for people who really hate to ask for money but who don’t mind asking for things that cost money. Items that one can sometimes get donated include computers, office paper and other office supplies, office furniture (second-hand from banks and corporations as they redecorate), fax machines, adding machines, food, even cars.

36. If you or someone you know owns a small business that has regular customers who receive a catalog or announcements of sales, write them an appeal letter for the organization. Your letter can say something like, “You are one of my best customers. As such, I let you know about sales coming up and good things happening in my store. Today, I want to tell you about another good thing—what I do when I am not minding the store.” Then go on to describe the group and ask for a donation.

37. Similar to #36, post this letter on your Web site. Link to the organization’s Web site and ask people to donate.

38. If the organization doesn’t have a Web site or doesn’t keep their Web site up, ask all your techie friends to donate $100 each and hire a Web Master.

39. Give it yourself. (This is so good I have to say it twice.)

40. Strategy with a long-deferred payoff (we hope): leave the group a bequest.

41. With similar hopes as above, get friends to include the group in their wills.

42. Ask friends who belong to service clubs, sororities, antique collecting groups, support groups, bridge clubs, etc. to discuss your organization in their group and pass the hat for donations. A once-a-year sweep of even small groups can yield $100 from each.

43. For the church-going: ask if your organization can be a “second collection.” The church passes the plate for its own collection and then you or someone from your organization gives a brief talk (or sometimes the whole sermon) about your group and the plate is passed again; the proceeds go to your group.

44. A variation on the above is to organize a “second collection Sunday” and get as many churches as you can to take up a second collection for your organization on the same Sunday. Someone from your group will need to be at each service and give a brief talk. Second collection Sundays can be very lucrative; the Catholic Campaign for Human Development collects as much as $20 million on one Sunday in all the participating Catholic churches in the United States.

45. If, as a child, you collected something avidly that you now store in a basement, consider selling it. Coins and stamps are particularly valuable and have usually increased in value over the years. But your collection of rocks, toy ships or rockets, arrowheads, or dolls can also be valuable. When you donate the income from the sale, you can deduct that amount from your taxes—an added bonus of this strategy, since you probably paid little or nothing for the items in the collection.

46. Have a sidewalk sale or garage sale for your whole neighborhood or building. Go around to your neighbors and tell them you will take their stuff outside and sit with it all day to sell it if they will donate half or all of the proceeds to your group. Since this is stuff people want to be rid of anyway, it is a good deal for them. In one apartment building with ten units participating in donating stuff, an organization netted $3,000 in one day. Three people from the organization helped with the selling. With a few high-ticket items, such as a washer/dryer or some nice lamps, you can make good money.

47. If you have an artistic bent, offer to design greeting cards to specification for organizations or individuals for a fee. If you are good at calligraphy, sell your skills to schools for graduation announcements, friends for classy but low-cost wedding invitations, or just fun certificates such as “World’s Greatest Dad” for Father’s Day or “Outstanding Friend.” Create unique Halloween costumes or masks. Donate the proceeds from your artistry.

48. Create a take-off on the “adopt-a-highway” technique by naming budget items of your group as available for adoption. You could develop a flyer that reads, “The following items have been found near death from negligence and abuse. Won’t you help? $25 per month will ensure that our computer is maintained. $100 per month will release our photocopy machine from toiling with no toner and a dying motor. (We can lease a new one.)”

49. An idea for people who live in border towns: Get permission to place a large container in stores or even at the airports of towns near national borders. Have a sign that asks people (in several languages) to throw in any coins or paper money they have not exchanged. Many times people leaving Canada or Mexico don’t have time to exchange all their money or cannot exchange their loose change. Multiply this times hundreds of shoppers or travelers and you can make a lot of money. UNICEF does this in many European airports.

50. Hold an “I’m Not Afraid” Auction. You can do this with just a few friends or hundreds of people if you have enough items to auction. You survey a few people (and use your own common sense) about what things need to be done in their home of office that they are afraid of or would really
rather not do. This is different from a service auction—there has to be an element of dread in the activity. For example, some people cannot wash their windows because their apartment is too high or the second story of their house is too high and they suffer from vertigo. If you are not afraid of heights, you can sell your window-washing service (bring a sturdy ladder). This goes for drain cleaning, minor roof repairs, antenna fixing, etc. Or, if you are unafraid of cockroaches or spiders, you can offer to clean out that dark corner or garage or basement for a small fee. Snakes can be found in gardens and woodsheds, but maybe that doesn’t bother you. The problem doesn’t need to be as serious as phobia. How about allergies to dust, pollen, weeds? If you don’t have them, you can mow, sweep, clean for a fee. By marketing it as an "I’m Not Afraid" Auction, you also have the option for people to name something they need done to a group of volunteers, and then have a volunteer say, “I’m not afraid to do that.” In that case, you will need a set fee for service.

51. Similar to the suggestion above is the “Details Auction.” This is for all your friends whose desks are overflowing with papers or who can’t get their receipts in order to give to the tax preparer or who complain they can never find anything. If you are a well-organized person, offer to clean up their desk, get their Rolodex in order, file their papers, etc. If you like to shop, sell that to people who don’t and do their holiday shopping for them, or buy birthday, baby shower or niece/nephew presents for them. Anything that people feel they cannot control is the organized person’s fundraising dream come true.

52. Find out which of your friends (perhaps this is true for you also) work in corporations with matching gift programs. Then ask them to donate and get their gift matched for your organization, and ask them to ask their co-workers to donate and get their gifts matched.

53. Think of a store or service related to your organization where a lot of your members shop. Ask the store to donate a percentage of profits for a certain day or week, or even forever. You can also explore this with mail-order firms. Then you advertise widely to friends, family and members that Joe’s Florist will give 2% of each sale during Valentine’s weekend to anyone identifying themselves with your group.

As you can see, almost all of these strategies involve asking for money and giving money yourself. These are the basic premises of fundraising—you must ask, you must give. Everything after that involves creativity, imagination and a sense of fun.

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Samples of Fundraising Commitments by Board Members or Other Volunteers

Here are three examples of how people filled out similar agreements. Their names and organizations have been changed.

**Example 1**

I, Matthew Cornwall, will help Community Organizing Project to raise $250.

**My gift:** $5/month = $60

**I will also:**

1. Ask four friends to pledge $5/month. I hope at least 2 will say yes, which makes $120. No help needed.

2. I will sell $70 worth of raffle tickets. (If any of my friends win the cash prize, I will ask them to donate half of it.) No help needed. I will ask my friends by May, and sell the raffle tickets before the drawing. You can also ask me to help with other events if you need me.

Signed: ________________________________
Example 2

I, Jane Mahoney, will help the Women’s Rights Organization raise $1000 in the next calendar year.

My gift: $250, paid in one lump sum in January.

I will also:

1. Organize and teach a seminar on organic gardening. I plan to have 20 people come at $25 each. I will pay for advertising.
   Goal: $500
   Planning: I will need some help finding a free room for the seminar, but no other staff help is needed.
   Date of seminar: March 15.
   Date to begin planning: Jan. 15.

2. I will contribute my couch to the garage sale. It is worth $100, but I will sell it for $50. I will buy a classified ad in the city newspaper telling people where to come to look at it. I will also help at the sale.
   Goal: $50
   Date: Whenever the garage sale is.
   Planning: I need the staff to tell me the date of the sale a month in advance so I can get the ad in the paper.

3. I will work on the phone-a-thon. I will bring the names of 25 people and call them myself that evening, and will call anyone else I have time for.
   Goal: 20 people actually joining @ $15 = $300
   Date: June 15
   Planning: No staff help needed for my participation in the phone-a-thon.

Note: I plan to go $100 over my $1,000 goal, so that in case something goes wrong I will still make my goal.

Signed: _______________________________________________________.

Example 3

I, Carol Benson, will help the Advocacy and Action Task Force to raise at least $500.

My gift: $50 paid in one lump, as soon as I can.

I will also:

1. Solicit a new computer for our office. I will work on this until March.

2. If that fails, I will solicit a fax machine. (I know some people in the office supply business so I think I might succeed.) I will work on that until May. No staff help needed, I don’t think, but if there is, I’ll give plenty of notice.

3. If the above two fail, I will have a barbecue at my house on the Fourth of July. At least thirty people will come and pay $10. Goal: $250 (I will take $50 out for my expenses.) Staff help needed to send out invitations and prepare food.

4. I will get two other board members to help me do a big bake sale at Suburban Shopping Center. We will get all the baked goods donated and be there all day Sunday, June 14.
   Goal: $200 (maybe more)

Maybe I’ll do the last two anyway even if the first one or two are successful. Don’t plan on it, though, and don’t ask me to do anything else unless you are truly desperate.

Signed: _______________________________________________________.

Kim Klein is co-publisher of the Grassroots Fundraising Journal.
What Do You Want Your Program to Look Like in 5 Years?

DREAM BIG.

Write or draw a picture of your dream program here. When you get discouraged, when you get rejected, come back to this page and focus on where you want to be.
The Case Statement

Why Does Your Organization Need To Exist?

What Makes Your Organization Unique?
What Can You Offer That No One Else Can Offer?

In Other Words...

Why Should I Support You?

Things to include:

Mental Health data in your area
Statistics showing how peer-run programs save money
Statistics showing how peer-run programs are effective
Emotional, anecdotal stories to tug on heartstrings and pursestrings
How your program impacts real lives in the community
Case Statement Worksheet

Every fundraising campaign begins with a case statement, which literally "makes the case" for why your organization deserves funding. Once the themes of the case statement have been worked out within your group, you can adapt the case language for your fundraising and marketing materials: grant proposals, fundraising letters, brochures, newsletters, press releases, etc.

The components of the case, as outlined below, are adapted from Fundraising for Social Change by Kim Klein. Working individually or with other people from your organization, use this worksheet to begin to prepare your case statement.

Organization

1. **Mission (or purpose).** Why does your group exist? What's the need? In other words, what problem are you trying to solve?

2. **Goals.** What do you hope to accomplish over the long run? In other words, what do you plan to do about why you exist?

3. **Objectives.** List your objectives -- specific, measurable, and time-limited -- that demonstrate how your goals will be met. (The more specific, the better.)
4. **Organizational History.** What have you accomplished so far? What is your competence? What are you most proud of?

5. **Structure of the organization.** Describe board and staff roles. Who's involved? What's their expertise? Why are they the right people to run this effort? How are decisions made?

6. **Fundraising plan.** How much money will you need to meet your goal? Over what period of time? What are the different components of your fundraising plan -- individual gifts, foundation grants, government funding, fee for service, etc. -- and how much do you expect to raise from each category?

7. Attach **financial statements** for the previous fiscal year and a **budget** for the current year.
Appendix D: Creating a Case Statement

Your case statement should:

1) Give the history, purpose and mission of the organization – answer the question “Why do you exist?”

2) Give an overview of your programs and services – answer the questions “What do you do, and why?”
   a) Present evidence that there is a need for your services within the population in your area.
   b) Show that your services are worth supporting. Consider what your services accomplish and what would happen if your services weren’t provided.
   c) Convince the reader that the organization cannot, without the support of outside funding, meet the need the program addresses.
   d) Explain how the donor’s funding would be used for the program.

3) Give examples of how your organization is different from other similar organizations – does it serve other populations, address different needs, provide different services for similar needs, or provide services in a more cost-efficient manner?

Tips for preparing the case statement:

1. Involve key staff, board members, donors, and volunteers.
2. Have only one writer.
3. The case statement does not need to be long.
4. Use simple, brief language that people can understand.
5. Be convincing and optimistic.
6. Present a positive image.
7. Base it on the organization’s strengths not needs.
8. Project the future, not the past.
9. Tell the story with pictures and charts, where possible.
10. Make the case from the prospect’s point of interest; be donor-oriented.
11. Demonstrate the capacity to solve problems that are important to donors.
12. Show the organization’s needs and wants are a good investment.

Bottom Line:

Your case statement should convince the reader that (a) your organization can and will provide worthwhile programs with the reader’s contribution and (b) their contribution is needed now.

How Well Do You Present Your Organization?

The website of an organization is how many donors “meet” you. Therefore it’s just as important to make a great first impression online as it is in person. Your home page is your brand. It shouldn’t take more than 4 seconds of looking at your web site to see what your organization is all about.

Sixty-Five percent of donors who use the Internet visit the web site of a potential recipient organization EVERY time they give.

Do you show your VISION? Can someone see how well their money will be used? Do you brag about your recent accomplishments? Do you have any third-party endorsements?

Checklist for Website Home Page

☐ Can a stranger identify what you do and why they should care within two seconds? Make sure you have a VERY brief way to convey what you do.

☐ Do you have a big, emotionally affecting image or statement on the home page that connects on a personal level?

☐ Can you find your donate button in 1-2 seconds?

☐ Is your donation button above the fold, big and colorful?

☐ Is your donate button framed in a compelling way? What personally relevant, tangible change will result if someone gives now?

☐ Is it clear where the money goes? To directly which activities or people?

☐ Is there a sense of immediacy around your donate button? A reason to give right now?

☐ Do you have links to events and other opportunities for engagement?

☐ Do you have clear third-party endorsement on the page? (For example: ratings from GuideStar and Charity Navigator, or a testimonial from someone else regarding your nonprofit’s services (a volunteer, a beneficiary, etc.).)

☐ Does your website give you and your potential donor the opportunity to take the first step in forming a relationship with you if they aren’t ready to give now (for example, email signup)?

☐ Do you make it easy to share? (For example, do you have social network sharing links, widgets, etc.? Do you list where else donors can find you online like Twitter and Facebook?)

☐ Are you sure you don’t have too much? Is the page clean, simple and easy to use? That means intuitive navigation that even Aunt Pearl can handle.
Do Your Communications Suffer from “Jargon Breath”?  
By Tom Ahern: Feb 23, 2009  
for Network For Good

“A at risk”? “Accessible”? “Services”? I hear what you’re saying. I just can’t see what you’re saying. And that’s the problem.

What’s wrong with jargon?
Just about everything — once it leaves your office.

Jargon is for specialists only. It’s convenient professional shorthand used by staff to speed meetings along. Every industry has its jargon: the sciences, social work, health care, education, even fundraising. (The peculiar term “planned giving” comes to mind. You think the average donor understands what that really means? But I digress.)

Outsiders — and virtually all donors are outsiders — do not get jargon, not the way insiders do. Sure, outsiders understand the words at a superficial level. But jargon does not, will not, cannot ring the bell that is the donor’s heart. Jargon is always clinical, abstract language. And, worse, it tells no tales.

Now maybe you’re thinking you’re immune to jargon? Not so fast. Jargon is sneaky. Charities often use jargon and don’t even know it. For example...

At risk ... accessible ... services.

These three terms seem innocent enough. And they’re certainly common: even news reporters use them without a second thought.

But is the real meaning of words like these all that obvious to the layperson? Don’t count on it, I’m begging you.

Of course, ask a donor what a term like “at risk” means; and you’ll get some kind of definition. “At risk? Why, that’s some poor child who’s forced to grow up in a bad neighborhood. It’s tough. But, you know, heck, my grandfather was an at-risk child once, when he came over from the old country. And he turned out just fine.”

Charming. Just not what you meant.

When you, the expert, say “at-risk kid,” you have in mind:

* A specific child whose name you know, with a dozen things stacked against him and a less than 50% chance of ever graduating high school.

* Which means, even with a good brain, he’s doomed, statistically speaking. Without a diploma he’ll work minimum-wage jobs the rest of his life, marry too young, die too young, and society will lose his full contribution.

* And yet you know -- you have the proof -- that it doesn’t have to be that way. You know that, in fact, this particular “at-risk” child can make it and become a successful adult -- if enough donors continue to support your wonderful, proven, amazing, life-transforming programs.

Just remember (have it tattooed on your wrist, if it helps): an outsider simply cannot accurately visualize what your jargon means. The references are missing. The daily exposure is missing. The context is absent. For insiders, jargon can conjure a rich world. For outsiders (i.e., donors), jargon just conjures confusion and blank mental screens.

It is the vivid mental picture of human suffering that stirs donor empathy. You can’t create that kind of picture with mere jargon.

Takeaway: Jargon can be a serious obstacle to communicating effectively with your base of supporters. Outside the office, jargon is a dead language. We carelessly fling technical shorthand (“accessible,” “services”) at our donors and prospects. But generalists do not interpret these terms correctly and profoundly, the way specialists do. Terms like “at risk” fail to move people unless we bring those terms to life vividly through anecdotes, photos and other real-life devices.

Cassandra’s Little Chart of Real-world Words

From the GRANT SEEKER’S TREASURE MAP & ORIENTEERING GUIDE by Cassandra Nudel

Instead of using the word “Consumers,” try:

• People in mental health recovery
• People in recovery from mental illness
• People who have been diagnosed with mental illness
• People who have been labeled with mental illness
• People who have been institutionalized in the mental health system
• Psychiatric survivors (include explanation)
• Mental health advocate
• People with mental health problems
• People experiencing extreme mental states
• People experiencing mental health struggles
• People with a mental health diagnosis
• People experiencing mental health crisis
• People experiencing psychiatric symptoms
• People who have been in mental institutions
• People who use services in the mental health system

Instead of using the phrase “Consumer-run program,” try:

• Program that is governed and run by people who have been diagnosed with mental illness
• Grassroots mental health programs that are governed and run by people with mental illness
• Peer-run program (with explanation)
• a member-led organization
• Decision-making by constituents
• Grassroots, social change organization
• Mental health wellness and recovery program
• Mental health self-help program

Instead of using the phrase “Consumer movement,” try:

• Mental health recovery movement
• Mental health disability rights movement
• Mental health advocacy movement
Image is Everything: Promotional Materials

THE BASICS

☐ Is it clear who the audience for your text is?
☐ Is all of your outreach consistent in terms of tone and style?

QUALITY CONTROL

☐ Have you checked spelling and grammar?
☐ Is your text readable? (Hint: White text on a color background and small font size are not easy on the eyes.)
☐ Have you checked for wordiness? (i.e. Have you whittled down as much as possible?)
☐ Did you print out your text and read it aloud? All of it?

HEADINGS

☐ Do you limit your use of italics to captions or phrases?
☐ For longer pieces of writing, do you use sub-headings?

READABILITY

☐ Are blocks of text broken into bulleted lists?
☐ Is the text written in “inverted-pyramid” style?
☐ Are all paragraphs limited to one idea per paragraph?

DESIGN

☐ Does your writing incorporate graphics?
☐ Do you use easy-to-read fonts?
☐ Is all of your text at least 10-point type?
☐ Is there negative (white) space?
Creating A Development Plan

Fundraising? Development? What’s the Difference?

**FUNDRAISING**
the act of raising money

**DEVELOPMENT**
the policies, structures, practices, and plans
that ensure resources for your organization over the long term
A DEVELOPMENT PLAN IS...

an outline showing

how an organization is going to fund its programs

during a specific time period.

It is the fundraiser’s roadmap.
YOU NEED A DEVELOPMENT PLAN BECAUSE...

- It creates a culture of fundraising.
- It ensures that revenue goals are realistic.
- It ensures that your organization has a diversified funding stream.
- It is a monitoring tool for measuring progress.
- It helps you avoid “out of context” fundraising that can jeopardize your organization’s long-term success.
- It outlines roles and responsibilities.
- It helps funders know where they fit into your funding patterns.
A DEVELOPMENT PLAN HAS...

**STATEMENT OF PURPOSE**
This is a bold announcement that your plan supports your organization's mission.

**STRATEGIC GOALS**
These goals address the big, broad ways to make or keep your organization financially sound. Some of these goals will take time to accomplish, even a number of years. Remember, a development plan is about the long term. Examples of strategic goals are: to diversify funding streams; to involve more people in fundraising; or to ready the organization for a capital campaign in three years.

**FUNDRAISING GOAL**
This is the amount you need to raise this year to support your operating expenses. This goal is derived directly from your organization’s operating budget.

**CASH FLOW PROJECTION**
A cash flow projection ensures that your revenue stream is steady and adequate to meet expenses.

**SPREADSHEET OF APPEALS**
This spreadsheet includes action steps, costs, net returns, ownership, and a timeframe. It is the essential tool in planning your work.

**OPERATIONAL GOALS**
This section of the plan identifies the structural and management tools that will support fundraising. Examples might be: to make sure your database will be current and accurate, to publish an electronic newsletter, or to hire a part-time grant writer.

**CALENDAR**
A large calendar, placed in a prominent spot, reminds everyone of when work needs to be done.
**SEVEN STEPS TO A DEVELOPMENT PLAN**

1. Take a look at where your organization is now. Why are you raising money? How are you raising money? Are you raising money?

2. Know how much your organization earned, spent and raised last year.

3. Figure out what sustained efforts are needed to achieve long-term financial stability for your organization.

4. Calculate how much money you need to raise to meet your operating budget.

5. Decide how you will raise that money.

6. Determine the resources you need to fundraise.

7. Let everyone know when the work will be done.

<table>
<thead>
<tr>
<th>STEP</th>
<th>YOU WILL NEED</th>
<th>YOUR DEVELOPMENT PLAN</th>
</tr>
</thead>
</table>
| 1    | Assess your current position | Innies and Outies Worksheet  
Funding Sources Worksheet | Statement of Purpose |
| 2    | Gather data from the previous year | Putting It All Together |
| 3    | Set strategic goals | Innies and Outies Worksheet  
Your Pie  
Your Pyramid | Strategic Goals |
| 4    | Set fundraising goal | Organizational Budget | Fundraising Goal |
| 5    | Plan appeals | Fundraising Toolchest  
Gift Range Chart | Cash Flow Projection  
Spreadsheet of Appeals |
| 6    | Set operational goals | Spreadsheet of Appeals  
Innies and Outies Worksheet | Operational Goals |
| 7    | Create a calendar | Calendar | Calendar |
INTERNAL AND EXTERNAL FACTORS THAT AFFECT FUNDRAISING

INNIES

• We follow a fabulous strategic plan.
• We made a five year plan six years ago.
• Our board is great about asking people for money.
• Five board members haven’t given a single gift to the organization.
• We have a dedicated corps of volunteers.
• The board chair is a creep.
• No one knows the password to the database.
• We’ve somehow always raised enough money to meet our expenses.
• The ED took a salary cut so we could pay staff last month.
• Our new building has lots of space for programs and administration.
• The development office is a coat closet.
• We have five or six major donors.
• We lose money on every mailing.
• We get lots of money from grants.
• We have an endowment.
• We have no time to raise money.

OUTIES

• The stock market tanked last year.
• We operate in a rural community.
• Another group is planning a queer marathon.
• Donors are suspicious because of local and national charity scandals.
• We are the darling of the local nonprofit community.
• It always rains on the day of our Garden Gala.
• Fred Phelps is planning a little visit.
• The newspaper is cutting back on media sponsorships.
• The state highway commission announced plans for a new freeway, right by our building.
INTERNAL AND EXTERNAL FACTORS THAT AFFECT OUR DEVELOPMENT PLANNING

INNIES

OUTIES

TOP 3 INNIES
1.
2.
3.

TOP 3 OUTIES
1.
2.
3.
Analyze your diversification “pie” to determine if there are funding sources and fundraising methods you could be accessing, or to see if you are over-reliant on certain funding sources.

Consider the donor pyramid and think about the donors you have, or could have. Are almost all of your donors at the base of the pyramid? Who are the people you could be adding to each level?
YOUR PIE

Color in and label "slices" that represent the percentages of your funding currently coming from events, grants, face-to-face asks, direct mail, telemarketing, and corporate support.

Top three funding sources or methods to explore or increase:

1. 

2. 

3. 

*Because planned giving shouldn’t be included in annual giving, don’t put it in your pie. But if you’re not exploring it as a funding source, you should be!*
YOUR PYRAMID

Color in and label the levels of donors you currently have. Be proportional!
Your levels—from the bottom to the top—will be: people who give through mail, telemarketing, e-philanthropy or events, annual donors (members could be included here), major gifts, people who have made a planned gift.

Top three types of donors to bring into the organization or move up the pyramid:

1.
2.
3.

Don’t forget donor groups like your board members, lapsed donors, and your volunteers!
Identifying Logical Funding Sources For Your Organization

Assuming you have a fine case statement...

**Personal Solicitation:**
Will you ask your friends and family to support your organization? Will your board members? Are you willing to go out and meet people who are interested in your cause?

**Direct Mail Fundraising:**
Do you have money to spend on printing and postage? Ability to write fundraising appeal?

**Private Foundation Grants:**
Do you have time to write proposals and research prospects? Follow up with reports?

**Online Fundraising:**
Do you have a website? Ability to accept online donations?

**Email Fundraising:**
Do you have an email program and email addresses? Ability to accept online donations?

**Special Events:**
Do you have time and energy to host an interesting, entertaining, and profitable event?

**Earned Income Strategies:**
What do you give away that you could sell?

**Ancillary Income:**
Do I have time to do the paperwork for these options? Can I find a volunteer to do it?
Potential Donor Worksheet

Friends and Family I can ask for support right away: I will do this by (Date):

1. ________________________________
2. ________________________________
3. ________________________________
4. ________________________________
5. ________________________________

Three Foundations I can investigate right away: I will do this by (Date):

1. ________________________________
2. ________________________________
3. ________________________________
October 13, 2009

First Name Last Name
Street Address
City State and Zip

Dear …,

I want to invite you to a “Book Launch” party at 6 p.m. on Thursday, October 22, at City Space, 100 E. Fifth Street in Charlottesville, which celebrates the release of *Firewalkers: Madness, Beauty and Mystery*. *Firewalkers* is part of a larger anti-stigma project, conveying the message that what is labeled “mental illness” has the power to enrich us, reveal unknown strengths, and transform our lives. The book chronicles the stories of seven people who have recovered from mental illness. The book is produced by VOCAL, the statewide support network and self-help education program for consumers of mental health services. The book project began several years ago as an anti-stigma project in response to the tragedy at Virginia Tech.

As you know, I lost my husband to mental illness and substance abuse several years ago—Joe is now in state prison for the next 25 years. As you can imagine, I have learned a great deal about mental illness over the past few years. Through an odd series of twists and turns and job losses, I now work for VOCAL. I still struggle with the stigma—every time I walk into a new group of people, I wonder, “Do they know about Joe?”

Three years ago, access to mental health services could have made all the difference in the world to my family. It’s too late for my now ex-husband and it will cost the state roughly $750,000 to keep him the length of his sentence, but if we could improve the outreach and availability of mental health services, we surely would keep other folks out of jails, prisons, and emergency rooms. Joe was uninsured at the time, and didn’t have a high regard for doctors and therapists anyway. He might have responded to a peer-support group like the ones VOCAL forms and promotes throughout Virginia. An example of one of these in Charlottesville is *On Our Own* on Northwest 4th Street. There are 33 other programs across the state—they are drop-in centers, employment centers, and self-help education groups.

VOCAL’s work respects the inherent worth and dignity of all people, regardless of their current or past mental state, diagnosis, or use of medications. One of the strengths of peer support is that we understand each other better than people who have not experienced mental illness. I too, have my “insanity point”—and believe most of us do—but I have managed it over the years with the help of family and friends. I’ve come to understand that my insanity point draws from the same well as my creativity and spirituality, and am grateful to God that I have had peers to help me through rough times. I want everyone to be so fortunate!

VOCAL actively seeks to educate individuals on how to stay mentally well. We build and strengthen our network of recovery programs, and keep those already in recovery connected to one another. We educate legislators about the needs and interests of people who have been diagnosed with mental illness in Virginia.
When people in mental health recovery tell their stories and work with administrators, politicians, and service providers, stigma will be dispelled and recovery can begin. Being active in the mental health recovery movement enables individuals to break out of their roles as patients and into roles as peers, advocates, support people, community leaders, and productive members of society.

Virginia’s mental health system has been in crisis since the budget cuts of the 1980s. In many locations, people experiencing psychiatric crisis do not receive services when in need; if at all. The Inspector General’s Report from June 2007 found an average wait for outpatient psychiatric appointment to be 35 days. The average wait for outpatient appointment following an emergency is 23 days. I remember when Joe called Region Ten for help, they offered him an appointment six weeks away. Joe’s entire descent only lasted three weeks before he was locked up.

One in four adults suffers from sort of diagnosable mental illness. In the U. S., the annual cost of mental illness is estimated to be $79 billion. However, interventions at peer-run mental health programs are extremely economical. In 2009, there will be approximately 100,000 “interventions”—instances of people facing mental health challenges reaching out to their peers and receiving help—across the state of Virginia.

Why am I telling you all this? I want you to do at least one of these things this month, as October is Mental Health Month.

1). Come to the book launch party and meet people who have overcome mental health challenges. It will open your eyes.

2). Buy a copy of Firewalkers and share it with someone you know is struggling with depression or other emotional issues. It is available from our website, www.VocalVirginia.org.

3). Make a donation to the work of VOCAL. You can send a check to the address below (I’ll include an envelope) or donate online at www.VocalVirginia.org. Gifts over $100 automatically receive a copy of Firewalkers. We need to raise $10,000 specifically from our friends and families by the end of the year to continue our work.

4). Say a prayer for those suffering from mental health issues, and for their families. While you’re at it, send good wishes for all of us working at VOCAL. We are likely to see some of the effects of the Governor’s budget cuts this year—an increase in need coupled with a reduction in funds for mental health services will stretch us all.

Thank you for hearing my story, and for whatever you can do to promote mental wellness in all the lives you touch.

Sincerely,

Ellen Moore Osborne
Development Director
VOCAL, Inc.

P. S.— If you have any questions about VOCAL, feel free to give me a call. I’m enclosing a brochure, too.
Dear Friend of VOCAL,

We have exciting news! The staff and board of directors of VOCAL have issued a matching gift challenge to the membership. When the membership combines their efforts and donates $1000, the staff and board will match that gift with another $1000 out of their personal pockets!

Now, there are about 800 VOCAL members... if all 800 VOCAL members gave $1.25, or a gift that is personally meaningful, we can reach our goal!

As you know, staff and board are mental health consumers just like you. VOCAL is 100% Peer-run. You have experienced some of the same things we have. Some of us can only give $1.25, but we all believe in the spirit of self-determination and self-help, and want VOCAL to become more self-supporting.

If, at this time, you send us prayer, good wishes, or positive thoughts about the work of VOCAL, know that those also are valuable and keep us empowered. Take a minute and send those blessings our way. The power of our many voices together can do amazing things!

We who are affected by mental health challenges are working with what we’ve got—each other—through our peer-support programs. Together, we are transforming the mental health system. We are helping each other recover and go on to lead productive lives.

As you know, VOCAL is a non-profit support network, social change movement, and self-help education program. VOCAL was founded in 2000 by (and for) people who have experienced a mental health crisis. Up until recently, we have been 100% funded by the state and federal governments. If you watch the news, you have heard about the budget axe that will be cutting budgets everywhere. We recognize that the need to diversify our funding sources is more critical than ever as we work to survive these tough economic times.

Another thing you can do to help VOCAL is to call, email, or write Governor Kaine and plead the case for mental health funding in Virginia. His phone is (804) 786-2211 and address: The Honorable Governor Kaine, Office of the Governor, Patrick Henry Building, 3rd Floor, 1111 East Broad St., Richmond, Virginia 23219. Or, you can go online to www.governor.virginia.gov and send him an email message through his “quick link.” This funding crunch is another opportunity to send your prayers, goodwill, and positive energy—ask our higher power to provide for all of the mental health needs in Virginia.

People who have experienced and recovered from mental health crises, like us, can help their peers in a unique and cost-effective way. The peer-run movement is growing all across the country and has become especially strong in Virginia. With your help, we can continue reaching out to those with...
mental health challenges in these troubling times. If you have five quarters to donate, a five dollar bill, a fifty dollar bill, or more, this would be a great time to offer it to VOCAL. Any gift received by October 31, 2009 will be matched by the staff and board of VOCAL, up to $1000.

Participation in self-help groups has been found to lessen feelings of isolation, increase practical knowledge, and sustain coping efforts. A number of controlled studies have demonstrated tangible benefits for mental health consumers participating in self-help programs. One study found that participants in peer-run groups reported fewer symptoms and fewer hospitalizations after joining the group. We hope that's been your experience, too.

We put together the VOCAL CO-OP, a collective of peer-run grassroots mental health programs, because we want peer-support programs to become accessible to all Virginians. We provide support in program development, strategic planning, and other areas of nonprofit management to these peer-run groups and centers in Virginia. These peer-run programs are accessible, affordable, and focus on self-determination and empowerment. Peer-run programs help because they are often open on weekends and evenings, times when other mental health programs may be closed—leaving people in need with nowhere to turn but hospitals or jails.

As people who have personally experienced mental illness, VOCAL respects the inherent worth and dignity of all people, regardless of their current or past mental state, diagnosis, or use of medications. We believe in self-determination—the rights of all of us to have a say in our own mental health care. The approximately 57 million Americans who will experience a significant mental health challenge this year ideally will become educated about their diagnosis and to make their own choices about their treatment. They need to understand that recovery is possible. We are more than our diagnosis. We can go on to lead fulfilling and productive lives.

Peer-run programs serve as both complements and alternatives to traditional mental health programs, helping reach hard-to-reach populations, and helping create a system where all people have choice and option to find the kind of care that works best for them.

The U.S. Surgeon General also acknowledges the contributions of peer-run services. The 2006 document, Mental Health: A Report of the Surgeon General, states, “The emergence of vital consumer and family movements promises to shape the direction of mental health programs for many years to come. ... Organizations representing consumers have promoted important goals and have invigorated the fields of research as well as treatment and service delivery. Among the principal goals shared by much of the consumer movement is to encourage self-help and a focus on recovery from mental illness.”

Peer-run programs are effective and economical. The mutual support, information and growth found in a peer-run community are vital to the recovery of those suffering mental illness. We are grateful every day for the time and talent our peer-run program leaders put into their work. In VOCAL peer-run programs, people can break out of the roles as patients and into roles as advocates, support people, program organizers, and community leaders.

Here is one VOCAL success story you might recognize:

Bonnie was diagnosed with a severe mental illness in 1995 after fifteen years of seeking to understand of what was happening to her. Homeless, living out of her car, and unable to work, she received Social Security Disability benefits for many years. She counted on Meals on Wheels to bring her food, as she was unable to manage the daily chore of finding food.

Bonnie’s life turned around quickly and dramatically when, in 2005, a VOCAL member first introduced her to the idea of mental health recovery, rather than symptom management.
“Someone in recovery told me about people living fulfilling lives, despite various di-
agnoses. Someone believed in me. Someone was willing to use his own story to show me
I am not a freak, I was just lost behind my symptoms. What made the difference for me is
the mirror I found in my peers. I saw pieces of me in other people’s stories and found hope
that I could change things for myself.”

Bonnie is now employed, generously shares her story to assist others in their recovery journey, and has
become a well-recognized mental health advocate in the Commonwealth of Virginia. She has been de-
scribed as a “voice of reason” on emotionally charged mental health issues. Perhaps you heard her
recently being interviewed on NPR about the new legislation involving Psychiatric Advanced Directives. It
is our hope and prayer that everyone experiencing a mental health challenge can meet a peer who can
be an example of recovery, just like Bonnie did.

The peer-run programs in Virginia serve thousands of individuals who are actively working to
ensure their own mental wellness. Given the economic climate, VOCAL is anticipating a rising
demand for mental health services across the state. We believe that with the proper funding, we can
continue to help connect people in mental health recovery and continue to promote mental wellness.
Won’t you please join us in this capacity-building effort? We don’t know your financial situation, but we
ask that you give whatever is meaningful to you. Maybe that’s a dollar, maybe that’s a prayer, or maybe
that’s a thousand dollars. We are grateful for whatever you can do to help the peer-run mental health
movement in Virginia.

Through the VOCAL NETWORK, we keep Virginians informed about upcoming mental health
legislation. We actively seek to include mental health consumers on local boards and decision-mak-
ing groups. In the past four months, VOCAL has ensured that mental health consumers have been repre-
sented at over 300 advocacy meetings and trainings. Each year, VOCAL conducts approximately 200
outreach presentations on mental health recovery at colleges, universities, churches, Community Service
Boards, and hospitals.

Several months ago, a local police department began organizing Crisis Intervention Teams, and one
of our mental health advocates presented a portion of the training from the mental health consumer
perspective. She says, “As I was leaving, I noticed one of the officers standing out of sight of everyone,
but I had to pass by him on my way to the parking lot. He stopped me, with tears in his eyes and told me
part of his own mental health story, and how there is no one with whom he can safely share. I was able
to provide him some support and information about recovery. I let him know about recovery programs he
could safely participate in, without having to disclose his profession. He also would not have to tell about
his participation in such a group to his colleagues or superiors. Being able to reach out to him was truly a
rewarding experience.” No one but a fellow mental health consumer could have understood that officer’s
struggles.

**By investing in VOCAL with a donation, you can enable this work to continue**— you can make a
difference. You may not have the time or inclination to go before a board and speak on behalf of
mentally ill people in Virginia, but your financial contribution can enable someone to do so.

For the past four years, VOCAL has held annual conferences to provide opportunities for people in
mental health recovery to gather together and learn from each other’s experience. Over 200 people
have attended each year, and the numbers are steadily increasing each year. At each annual conference, 25
to 30 workshops are offered by people who have experienced a mental health challenge. One of our most
popular workshops informs people about the Wellness Recovery Action Plan (WRAP), a simple self-help
system for identifying personal resources and then using those resources to stay well.

The conference is always well received because it provides so many tools for self-help as well as be-
ing a great networking opportunity. If you want to offer input on next year’s conference, send us an email
P.S. — For donations of $100 or more, we will send you a copy of the soon-to-be-released ground-breaking book, *Firewalkers: Madness, Beauty and Mystery*. *Firewalkers* offers a different way of viewing mental health. What has been labeled *illness* can be a profound, turbulent, spiritual experience that has the power to enrich us, reveal unknown strengths, and transform lives. We can change the way people feel about mental illness, offer new ways to understand the journey, and help change attitudes in our state after the tragedy at Virginia Tech and the subsequent changes in mental health legislation.
Together... we are taking charge of our own RECOVERY!

Enclosed is a contribution of: $1.25 $10 $20 $50 $75 $100 Other $_______

*Donations $100 and over will receive a free copy of FIREWALKERS: Madness, Beauty and Mystery when released. Gifts received by October 31, 2009 will be DOUBLED by a Matching Gift! (Up to $1000)

Please update my FREE VOCAL membership for another year.
May we have your email address? ____________________________

Return this form to VOCAL, P. O. Box 1248, Charlottesville, VA 22902 • www.vocalvirginia.org

*Please provide address on credit card if different from address on left. Make corrections if necessary. Thanks!

CHECK ENCLOSED
USE MY CREDIT CARD
Visa MasterCard
Card Number: ____________________________
Authorized Signature: ____________________________
Expiration Date: ____________________________

(Also included: Brochure (see page 25))
Potential Funding Source: Private Foundation Grants
(listing from VOCAL spreadsheet at right —>)

Robbins Foundation
I. J. & Hilda M. Breeden Foundation
Dammann fund
Better Living Foundation
Robert Wood Johnson Funding partnerships
J. L. Camp Foundation
bama foundation
Farkas Family Foundation
Tyson Fund
Perry Foundation
J & E Berkley Foundation, Ivy VA
Whitney & Anne Stone Foundation
UU Fund for a Just Society
Dreaming Hand Foundation
Abelard Foundation
Fife Family Foundation
Public Welfare Foundation
Fruehauf Foundation
va festival of the book
Muse Family Foundation
Charlottesville Area Community Fdn
Standish Family Foundation
richmond community foundation
Ben and Jerry’s
meyer
Singing for Change
Sparkplug
google
LuckStone
virginia humanities discretionary
Sisters of St. Francis of Phila.
library foundation
Common Counsel Grassroots Exchange Fund
Noland Memorial Foundation
Oneill Fdn
Cartledge Charitable Trust
Mary Reynolds Babcock Foundation, inc
Lucius and Eva Eastman Fund
Puffin Foundation
Chatlos Foundation
Nathan Cummings
Coca-Cola
Needmoor
Comm Fdn for Natl Capital Region
Milbank
nathan cummings arts & social chage
Peace Development Fund
robert wood johnson discretionary
Commonwealth of VA Campaign
krese foundation emergining practices
Black Rock Arts Fdn
Fidelity Cares Corp Sponsorships
Ambrose Monell
Edwin Davis
Caruthers Fdn
Southern Partners Fund
Caruthers Foundation
mott
virginia humanities foundation
Commonwealth of Va Campaign
TJ United Way
nathan cummings arts & social chage
Southern Partners Fund
robert wood johnson discretionary
toms of main sponsorship
krese foundation emergining practices
Threshold
Fidelity Cares Corp Sponsorships
Virginia Foundation
Commonwealth of Va Campaign
vhcf, Health Safety Net
Westminster Presbyterian Church Outreach
Mid Atlantic Arts Fdn
Sojourners UCC Outreach Fund
Westwind Foundation Cville
Christ Episcopal Church Outreach Comm
Leo Burnett Company Charitable FDN
Susan W. Davenport and W. Edgar Spigle Fund
Self-Dev of People, PCUSA
of CACF
Hilda Davis
Helner Family Fund of the CACF
People’s Rights Fund
Grace Episcopal Church
U.U. at Shelter Rock/ Veatch
Holy Cross Episcopal Church, mission fund
Bert and Mary Meyer Fund
St. Paul’s Memorial Church
Surdna
Wesley Memorial United Meth Church
Bocock
Unitarian Church
See “Grant Seeker’s Treasure Map” for more.
Potential Funding Source: Private Foundation Grants

There are many non-governmental foundations that give money to causes in their area. You can research many of these foundations at Guidestar.org. On Guidestar, you can download their latest 990 tax form and see where they’ve given money; and if they are accepting applications, where to send it (usually in “Part XV” of the 990 form).

Once you find some that might be interested in your work, be sure to make a calendar of their due dates. VOCAL uses the free online Google Spreadsheet application because we have two people working on grants, and we can both access the data. We track the name of the foundation, deadline date, date application sent, amount we requested, who is in charge of that particular application, what program we’re asking money for, the foundation’s website address (if they have one), amount received, when a report is due, and the file name of the report sent (so we can find it later).

With the Google Spreadsheet, you can specify who can edit the document and who can just view the document. You can also have a similar page for major donors in the same document.

These are the mechanics of identifying and keeping track of private foundations. However, you know giving is about relationships—most of these private funders will want to get to know you before you support you financially.
Potential Funding Source: Private Foundation Grants

About writing grants....

Follow the directions on the application!
Get your proposal in a week before the deadline!
Double-check your numbers in your budget!
Have someone review your spelling and grammar!
Have someone review your proposal for jargon!
Potential Funding Source: Online Donations

Make sure your DONATE button is on your HOME page.

Donate to Vocal Virginia

In the spirit of self-determination and self-help, we believe we should make an effort to be self-supporting. Please contribute to the work of VOCAL by making a secure online donation by filling in the information below.

We are changing the system by speaking with one voice about the needs of people in recovery from mental illness. We encourage you to contribute to this project as you are able.

Thank you for supporting efforts in RECOVERY!

Donate by Credit Card:

First Name: [Input]
Last Name: [Input]
Address: [Input]
Address 2: [Input]
City: [Input]
State: [Input]
Zip: [Input]
eMail Address: [Input]

Credit Card Number: [Input]
Expiration Date: [Input] (MM/YY)
CVV Number: [Input]
Donation amount: [Input]

Click To Donate

Don't ask for unnecessary information when taking a donation online.
Look over your donation form and make sure it’s the best it can be! Do you have the following?

- An easy way to get to the form: a big donate button that is colorful
- One clear call to action on your donate form (Donate! Or, become a member!)
- Compelling yet brief copy on the donation form that emphasizes your mission is critical
- Copy is in a font size that is easy for people over 50 to read
- A look consistent with your brand
- Short donation forms – the more fields to fill out, the higher the abandon rate
- One-page donation forms (not multiple pages!)
- Limited navigation -- avoids giving users lots of ways to easily detour from the page before completing the action
- Automatic email tax receipts once the gift is made
- Opt-in for hearing from you again/email sign-up
- The ability to configure your form – so you can test different versions
- The ability to place web analytics on your form so you know what people do when they’re there
- The ability to set and test different donation amounts
- The ability to offer thank-you gifts
- Options to accept recurring gifts
- The ability to make the donation in someone’s name
Potential Funding Source: Email Appeals

Don’t even think about using your personal email address to do this. Sooner or later, you’ll be tagged as a spammer. VOCAL uses Constant Contact to build our email list and send the Digest and special appeals. How are you doing on growing your email list?

**WEBSITE**

- Is the sign-up form “above the fold”?
- Can people sign up on any page on your website?
- Is there an immediate offering of what they’ll get in return?
- Does your sign-up form and the text around it make a promise about what to expect (frequency, privacy, etc.)?
- Have you thought about whether you should use a single- or double-opt-in policy?

**EMAIL MARKETING**

- Is “Forward to a Friend” in every message?
- Have you reviewed your content to make it worth sharing?
- Is there a link to the sign-up form in your personal email signature?

**SOCIAL NETWORKING**

- Does your organization’s social networking presence encourage “friends” and “followers” to visit your home page and/or sign-up form?
- Do your promotional mentions show exclusivity? (i.e. If I Tweet about joining our enewsletter list, have I clearly shown why that’s special?)

**SEARCH ENGINE MARKETING**

- Have you tried sending click-throughs to a sign-up form (rather than your home page or an event page)?
- Have you signed up for keywords related to your topic and the content your organization can provide via email?

**OFFLINE CAPTURE**

- Have all people who answer the phone been instructed to ask for email addresses?
- Do you promote e-newsletters and online content in your print newsletters?
- Do you promote e-newsletters and online content in your direct mail?
- Have you begun to request opt-ins at all events?
- Will you mention our online communications in the next media mention you have?
Sending the Email

Getting ready to hit send on your latest email marketing masterpiece? Here are nine points to review before you do:

☐ Does your subject line entice readers to open? They’re the most important 8-10 words in your campaign. Make sure yours is a clear, concise introduction that entices your readers to take a look inside.

☐ Are you making the most of the preview pane? At first glance, many of your recipients will see just the first few inches of your campaign, so make your point - and your brand - stand out there.

☐ Is your email easy on the eyes? With simple, intentional font and style choices, you’ll help grab and keep your readers’ attention.

☐ Does the message come through, even if the images don’t? Since many email clients don’t automatically display images, balance yours with text that will help you make your point in any display possibility.

☐ Does this email have a personal touch? Whether it’s with a personalized greeting, warm tone or specialized content, make sure your email feels like a conversation with people who know you, not a “blast” to a list.

☐ Are you being CAN-SPAM compliant? It’s important to manage your online reputation by following best practices (and, you know, the law). Follow the basics by including your physical address at the bottom of your emails, including a one-click opt-out option and sending from an email address that you monitor and from which you’ll respond. (Those “donotreply@soandso.org” addresses are a no-no!)

☐ Do you have permission to email everyone on your contact list? Permission-based email outreach is the way to stay in your supporters’ good graces. Having “permission” means someone on your list is a member or subscriber of your organization, has signed up or otherwise asked to receive your emails or has participated (perhaps donated or attended a special event) in your organization within the past 18 months.

☐ Are you incorporating what you learned from your last email campaign? There’s no such thing as a perfect email, but you can certainly work to improve open, click-through and response rates by paying attention to the results of your previous campaign(s).

☐ Have you tested any part of your email message? It might not be realistic to test your subject line (i.e. send out a couple of versions of your campaign prior to the larger send to see which performs better) or lead article every time you send a message, but even an informal poll around the office may give you perspective on what will be most effective.
Fundraising Events Template

This document presents guidelines and suggestions for an ideal, large-scale, fundraising event. The timeframe is approximately 12 months.

*This template can be modified to work for a smaller event.*

## Approaching Your Project Sensibly

The credibility of your organization will be on the line in the eyes of the community. Considering all the potential challenges is very important. Consider these issues and suggested solutions.

1. **Issue:** Finding reliable event chairs with plenty of time and energy.
   **Suggestion:** Engage community leaders. Ask those passionate about your organization to take on the task. If they decline, ask for their assistance in identifying an alternative candidate. People are flattered when you tell them you need their "expert advise."

2. **Issue:** Covering event expenses prior to collecting revenue
   **Suggestion:** Identify and solicit event sponsors immediately.

3. **Issue:** Promoting your event within the community
   **Suggestion:** "Partner" with the local media to promote your event and cause. Get printing costs donated for invitations, etc.

4. **Issue:** Feeling overwhelmed with the details of an event
   **Suggestion:** Plan early, stay organized and leverage key relationships with those that have resources and expertise.

## Essential Volunteers/Committee Chairs

**Event Chair(s) -** oversees all activities relating to event from start to finish.

*General Duties:*
- Oversee the event at-large
- Generate budget
- Appoint committee chairs
- Determine theme
- Maintain communication with staff or key member of the organization

*Most of the detail work will stay with the specific committee chairs below*
Corporate Relations/Sponsorships - helps raise necessary seed money for early event expenses and help event tickets or tables to corporations

General Duties (Strong collaboration between Event Chair(s) on this):
  • Identify potential sponsors/donors: corporate and individual
  • Determine possible benefits for sponsors with the Event Chairs- (most sponsors will want something in return for their investment whether it's free tickets to the event or marketing and advertising for the company)
  • Deliver the promised benefits to sponsors
  • Identify potential sponsors for the event *(Be sure to consider pro bono sponsors which will help alleviate expenses)*
  • Draft strategy for acquiring sponsors
  • Understand what you need and what you plan to give back to the sponsor (benefits plan)
  • Generate all necessary paperwork
  • Understand the traditional giving cycle of your target sponsor—don't ask for money too late! Research your prospects.

Volunteer Coordinator Chair - recruits and energizes volunteers for all committees

General Duties:
  • Identify volunteer needs for each committee
  • Communicate regularly with volunteers on behalf of the Event Chair
  • Recruit more volunteers as necessary
  • Delegate tasks on the day of event

Media & Public Relations Chair - promotes the event

General Duties:
  • Develop the language for promoting the event
  • Identify media sponsors
  • Work with Corporate Relations/Sponsorship Chair regarding press releases
  • Communicate through various methods (TV, print, radio, web, email)

Other areas to consider once "core" committee members are determined and appointed. (Details covered in timeline.)

• Logistics Committee Chair - oversees the details and the flow on the day of the event

• Invitation Committee Chair - oversees the designing and mailing the invitation

• Decorations Committee Chair - determines necessary decorations based on theme

• Auction Committee Chair - organizes all aspects of auction

• Menu Committee Chair - works with the caterer on food and drink choices

• Entertainment/Program Committee Chair - determines and contracts entertainment (bands)
Special Events Timeline

12 months before event:

- Appoint Event Chair(s)
- Determine the purpose of your event (Fundraiser or donor development)
- Establish a theme for the event
- Establish the BUDGET: expenses and revenue
  - Your event can be priced to attract fewer people at a higher price, or more people at a lower price. Sometimes exposing the organization to a broader group of people is more important than reminding your loyal patrons how wonderful you are. Be sure to consider these costs:
    - Venue & service
    - Labor
    - Publishing costs
    - Special equipment
    - Entertainment
    - Decorations
    - Acknowledgment
- Event chairs determine and appoint Key Committee Chairs:
  - Corporate Relations/Sponsorships Chair (immediately)
  - Volunteer Coordinator Chair (no later than 9 months before event)
  - Media & Public Relations Chair (no later than 7 months before event)
- Event Chair(s) - Appointing specific committee chairs helps distribute the work. However, event chairs guide the overall purpose and vision of the event and cannot avoid working closely with each chair.
  - Schedule timeline:
    - Create a timeline highlighting the important aspects of the event
    - Determine absolute deadlines and plan accordingly to achieve them. (Example: If reservations must be received by Nov. 24, the invitation must be mailed 4 to 5 weeks earlier. Furthermore, the invitation needs to be to the printer 2 weeks before that, and design time can take up to 3 weeks. So far, this is 9 to 10 weeks out from date event.)
    - Determine guest list. (This will influence price per person costs.)
      - Be sure your guest list comprises appropriate people that will realize the purpose of your event. (Example: the more ritzy the event, the more affluent the guests.)
      - Start spreadsheet tracking: formal names, addresses, and phone numbers. This is the start of your guest list.
      - Use names from the organization’s general patron list
    - Determine Where and When
      - Establish location, time & date (this is vital to the planning)
      - Book venue: make deposits and sign contracts if necessary

9 months before event

- Initial committee meetings begin
  - Appoint last Committee Chair
  - Logistics Committee Chair
  - Invitation Committee Chair
  - Decorations Committee Chair
  - Auction Committee Chair
  - Menu Committee Chair
  - Entertainment/Program Committee Chair

Individual committees begin to plan the details of each area and adhere to budget constraints determined by Event Chair(s)

- Logistics Committee
  - Determine flow and timing of event
  - Determine volunteers needed
  - Brainstorm ideas for new and unique experiences
- Invitation Committee
  - Determine style (in-house? paper choice? professional print job?)
  - Choose design (Identify printer)
  - Choose and order paper. Be sure paper to be used will allow for the desired effect.
  - Determine whether you will mail invitations first class or bulk
- Decorations Committee
  - Begin to determine theme
  - Start cost evaluations
- Auction Committee
  - Identify financial goal
  - Determine milestones for success (Set realistic goals and evaluate them regularly.)
  - Get lists of past merchant donors
  - Divide list among committee
  - Design a solicitation mailing for auction donations
    If goal is large:
      - Include: Letter, Brochure, Return envelope
      - Determine postage needs
      - Be sure to use a clean address list
    If goal is modest:
      - Identify desired items and donors
      - Divide solicitations among committee members based on their personal relationships
      - Start asking
- Menu Committee
  - Start brainstorming on menu ideas.
  - Work with caterer on costs
  - Some caterers may invite you to taste a sample of the menu options to help with your decisions
Potential Funding Source: Special Events Timeline

5 months before the event
- Event Chair(s)
  - Begin early ticket sales with board members and high end donors—use their names on the invitation later (be sure to get their permission)
  - Send letter with benefits of early purchase if necessary
  - If you plan to list on invitation, be sure to list a deadline for printing purposes
  - Continue to hold monthly committee meetings
    - Go over budget with the Committee Chairs keeping close tabs on what each Committee spends
- Corporate Relations/Sponsorships Chair
  - Mail second invoices to corporate sponsors (if necessary)
- Invitation Committee Chair
  - Plan invite to drop in the mail 4-5 weeks before the event
  - Begin working with invitation design
    - Choose and order paper (be sure paper to be used will allow for the desired effect)
    - If you are using bulk mail be wary of busy mailing times: Christmas, Mother’s Day, Valentine’s Day; this could slow down your mailing
    - Including a return envelope will make the RSVP process easier for guests, but will increase expense of invitation.
    - Mailing envelope should have a “return service requested” statement. This will be more expensive, but all erroneous addresses will be returned to organization for correction.
    - Don’t forget to use your organization’s logo if possible
- Media & Public Relations Chair
  - Fax press releases to all newspapers, radio stations & T.V. stations
  - Corporate Relations/Sponsorships Chair
    - Mail second invoices to corporate sponsors (if necessary)

4 months before event
- Event Chair(s)
  - Begin cleaning up mailing list for invitations
  - Visit event venue
  - Continue holding monthly committee meetings
  - Go over budget with the Committee Chairs keeping close tabs on what each Committee spends
- Corporate Relations/Sponsorships Chair
  - Report your progress to sponsors
- Decoration Committee Chair
  - Order necessary decorations
  - Finalize decoration details with Event Chair
- Corporate Relations/Sponsorships Chair
  - Order necessary party favors
- Auction Committee Chair
  - Start collecting donated auction items
  - Keep an excel spread sheet going with all collected items and information
  - Make sure to keep all props to return to the donors

7 to 6 months before the event
- Event Chair(s)
  - Begin monthly meetings for all Committee Chairs (Keep this a standing date to insure attendance.)
  - Each committee reports progress and expresses needs
  - Reconcile Budget
    - Go over budget with the Committee Chairs keeping close tabs on what each Committee spends
- Corporate Relations/Sponsorships Chair
  - Continue with sponsorship solicitations and table/ticket sales
  - Start to collect sponsor logos for use in P.R. and signage
  - Ask sponsors to participate in volunteering for event
- Media & Public Relations Chair
  - Write press releases
    - Continue to hold monthly committee meetings
    - Include Date, Time, Location, name of organization holding event, volunteer groups involved, purpose of event, celebrities involved, contact information, sponsors
    - Working with the Auction Committee Chair actively solicit large auction donations
      - Items such as cars, trips, art, etc. usually require formal requests

- Entertainment/Program Committee
  - Determine amount of time available for entertainment before or during the event.
  - Determine use of band
    - Identify band
    - Check availability
    - Book ASAP (Some bands require a deposit)
  - Speaker/Auctioneer/Master of Ceremonies
    - Identify personality
    - Check availability
    - Book ASAP
    - Start drafting script

Event chair finalizes all deadlines in each committee and recruits volunteers for their committees.

- Corporate Relations/Sponsorships Chair
  - Begin sponsorship solicitations
    - Mail packets and meet potential sponsors in person
    - Get high powered, influential people involved in the ask
    - Follow-up bi-weekly until you get an answer
    - If corporations are uninterested in sponsoring the event at-large, ask them to commit to purchase a table at the event or several tickets

- Invitation Committee Chair
  - Plan invite to drop in the mail 4-5 weeks before the event
  - Begin working with invitation design
    - Choose and order paper (be sure paper to be used will allow for the desired effect)
    - If you are using bulk mail be wary of busy mailing times: Christmas, Mother’s Day, Valentine’s Day; this could slow down your mailing
    - Including a return envelope will make the RSVP process easier for guests, but will increase expense of invitation.
    - Mailing envelope should have a “return service requested” statement. This will be more expensive, but all erroneous addresses will be returned to organization for correction.
    - Don’t forget to use your organization’s logo if possible

- Corporate Relations/Sponsorships Chair
  - Mail second invoices to corporate sponsors (if necessary)
  - Go over budget with the Committee Chairs keeping close tabs on what each Committee spends

- Media & Public Relations Chair
  - Fax press releases to all newspapers, radio stations & T.V. stations

- Corporate Relations/Sponsorships Chair
  - Mail second invoices to corporate sponsors (if necessary)

- Invitation Committee Chair
  - Plan invite to drop in the mail 4-5 weeks before the event
  - Begin working with invitation design
    - Choose and order paper (be sure paper to be used will allow for the desired effect)
    - If you are using bulk mail be wary of busy mailing times: Christmas, Mother’s Day, Valentine’s Day; this could slow down your mailing
    - Including a return envelope will make the RSVP process easier for guests, but will increase expense of invitation.
    - Mailing envelope should have a “return service requested” statement. This will be more expensive, but all erroneous addresses will be returned to organization for correction.
    - Don’t forget to use your organization’s logo if possible
Potential Funding Source: Special Events Timeline

3 months before event
- **Event Chair(s)**
  - Start bi-weekly Committee meetings
  - Go over budget with the Committee Chairs keeping close tabs on what each Committee spends
- **Media & Public Relation Chair**
  - Fax second round of press releases
  - Report progress to sponsors
    - Include any new/early ticket or table buyers
- **Logistics Committee Chair**
  - Get volunteers committed for the day of the event
  - Clarify any parking issues that might be attached to using the venue
- **Invitation Committee Chair**
  - Finalize invitation designs- last chance for early sponsor opportunities and tickets purchases!
    - Send to printer within two weeks
    - Allow one week for proofing and approval by committee and organization
    - Start early label printing if necessary
- **Auction Committee Chair**
  - Continue to collect the auction items
    - Determine bidding procedure for larger items:
      - Live: be sure to book an auctioneer
      - Sealed: start promoting items to guests
    - Send out booklet of items collected before the event
    - Silent: Generate bid sheets and determine minimum bids on all items
- **Menu Committee Chair**
  - Begin to focus on menu options
    - Work closely with caterer
    - Don't forget to consider special dietary needs of guests
    - Make menu match the season
    - Set up time for tasting of the menu if necessary
- **Entertainment/Program Committee Chair**
  - Final considerations
    - Sound systems
    - Transporting heavy objects
    - Get all information to the invitation committee for publication

2 months before the event
- **Event Chair(s)**
  - Continue with bi-weekly committee meetings
  - Go over budget with the Committee Chairs keeping close tabs on what each Committee spends
- **Invitation Committee Chair**
  - Get invitation volunteers together to assemble
  - Check on available postage first class bulk
  - Mail invitations
- **Entertainment/Program Committee**
  - Confirm entertainment

1 month to 2 weeks before the event
- **Event Chair**
  - Begin collecting reservations
  - Seat guests according to their priority. This can be determined by donation level, profile in the community, etc.
  - Final arrangements made and approved for decorations
  - Reconcile budget
  - Volunteer coordinator should meet with each committee chair to determine needs
  - Reconcile Budget
- **Corporate Relations/Sponsorship Chair**
  - Start to design signs for sponsors
    - Be sure to use the most updated logo
  - Report progress to sponsors
- **Media & Public Relations Chair**
  - Send another round of press releases
    - Be sure to get local society reporters to cover the event (you may need to comp their tickets)
- **Decorations Committee Chair**
  - Order flowers
  - Make sure decorations have been finalized
- **Auction Committee Chair**
  - Continue to collect auction items
  - Print all necessary bid sheets for the auction
  - Mail mini-auction booklet to confirmed guests to promote items (if budget allows)
- **Menu Committee Chair**
  - Confirm menus with the caterers
    - Be sure all rentals have been requested
    - Make sure all beverages are set including non-alcoholic beverages
Potential Funding Source: Special Events Timeline

The week of the event

- **Event Chair**
  o Fill empty seats with potential donors/sponsors, dedicated committee members or staff from the organization
  o Finalize the seating chart
  o Call each committee chair to check status
- **Logistics Committee Chair**
  o Confirm volunteers - tell them where to be and when
- **Decoration Committee Chair**
  o Coordinate final plan to deliver decorations
- **Auction Committee Chair**
  o Account for all auction items and bid sheets
- **Menu Committee Chair**
  o Confirm catering
- **Entertainment/program Committee Chair**
  o Confirm entertainment
  o Confirm arrival times
  • Emcee
  • Entertainment
  • Volunteers

Day before the event

- **Event Chair**
  o Print out guest list in alphabetical order for the check-in volunteers
  o Generate checks for entertainment and caterer if required
- **Media & Public Relations Chair**
  o Deliver signage to event site (any other items that can be delivered early should arrive in the late afternoon)
- **Entertainment/Program Committee Chair**
  o Be sure all necessary sound equipment is delivered early on the day of the event in case of problems

Day of the event

- All Event & Committee Chairs
  o Arrive for set up
  o Work in shifts
  o Be sure all aspects are in place before leaving to get ready
  o Return to the event (dressed for the evening) 45 minutes before guests arrive
- **Logistics Committee Chair**
  o Have volunteer coordinator lead his/her troops
  o Keep timeline close at hand all evening to check the status
- **Decoration Committee Chair**
  o Check the quality of the decorations
- **Menu Committee Chair**
  o Walk through event one final time with the caterer
- **Entertainment/Program Committee Chair**
  o Have feature entertainment and speakers in place 20 minutes before you need them

Post-event follow up

Take time to evaluate your event especially if you plan to repeat it! Don't forget one of the most important aspects of your event: saying "Thank you" to everyone that participated in the event.

- **Event Chair**
  o Reconcile budget
    • Collect any outstanding money or pledges
    • Mail or deliver all expenses from event
  o Send thank you notes to all committee members
  o Send a report to all sponsors with a thank you
    • Consider having a follow-up thank you party for everyone who participated
  o Send follow-up communications to all special guests encouraging them to continue to support the organization
  o Collect all articles and press clippings
  o Meet with individual committees 2 to 5 days after the event for evaluation
    • Discuss all successes and challenges of event
    • Offer suggestions to remedy problems
    • Offer explanations as to why certain things did and did not work
    • Evaluate whether the event served its purpose
    • Decide whether you would do the event again
  o Save all notes and compile a notebook for reference to future chairs
    • Include all budget to actual information
    • Include receipts
    • Include planning notes from each committee chair
    • Include all press releases
    • Include sample letters sent to sponsors
    • Include sample invitations
    • Include guest lists

From Ballet Austin Tool-kit
Potential Funding Source: Earned Income Strategies

Are You Ready for Enterprise?

Ten questions to ask yourself before starting a nonprofit earned income venture
Andy Robinson

For someone who’s spent 20 years trying to right the wrongs created by our economic system, I’ve come to a startling discovery: Commerce can be used to create social change. Dozens of progressive nonprofits are developing and selling goods and services that support and extend their missions. In doing so, they are discovering new strategies for educating their communities, activating their constituents, and expanding their budgets.

If you’re thinking about starting a nonprofit venture, consider the following questions carefully:

What do you give away that someone might buy? What “assets” do you have – products, services, expertise, ideas? Start by making a list of the things your group does well, then consider what makes your organization unique. What do you have or do that no one else has or does?

Who are you trying to reach? List all current and potential audiences, customers, clients, and so on. Think as broadly as you can. The best paying customers may not be your primary audience.

Can you develop new products – and reach new customers – by repackaging your expertise? For example, individual home ownership workshops can be combined into a workshop series. Another option is to take the content from one format (a workshop) and re-create it in a different format (book, video, “toolkit”). A third option is to repack the same content in a different format to reach new customers, such as a workshop in a second language, or a workshop geared to a specific profession or population.

The trick is to look at what you know and what you do, determine all the audiences that could benefit from your expertise, conduct market research, and package your knowledge to best meet their needs.

Can you sell to businesses, nonprofits, or the government? Most commerce is conducted among businesses and institutions, not by selling to individual consumers. Your best audience may be other nonprofits, businesses, or government agencies. As customers, they’re more reliable and predictable, they budget purchases in advance, and tend to buy in larger quantities.

Think creatively about how you can serve institutional customers. For example, the Resource Center of the Americas in Minneapolis provides Spanish lessons and cultural awareness programs to the local police department and newspaper. Our Community Bikes in Vancouver offers on-site bicycle commuter classes for local corporations and government agencies.

Do you have the infrastructure – financial systems, time management, database – to support a business? Commerce is based on a simple premise: The money you bring in must be of greater value than the time and money you spend. If we include the “second bottom line” of meeting your mission, the equation becomes: The money you bring in and the mission-related benefits you create must be of greater value than the time and money you spend.

If you don’t understand the numbers – both time and money – you can’t predict what it will take to earn a profit. Before you think seriously about starting a business, get control of the numbers.
Who’s in charge here? You’ll need an “enterprise advocate” with primary responsibility for managing the venture and sufficient time to do it. Hire someone with relevant business skills, or provide training for the passionate but inexperienced. Don’t dump this job on a staff member who already has full-time responsibilities – it won’t work.

Do you have the right team? You’ll need expertise in sales, customer service, marketing, financial management, business planning, and fundraising. Lacking these skills, you’ll need to know where to look for outside help. Furthermore, a resistant or uneducated board can sink your earned-income project. Recruit people with relevant business experience who also love your mission. While corporate contacts may prove helpful, don’t forget self-employed businesspeople, including artists and other cultural workers.

How many marketing strategies can you use at once? Novice entrepreneurs rarely budget enough time, money, or attention to marketing. Successful promotion is based on variety and repetition, employing several approaches simultaneously, and using them over and over. In the end, the most effective marketing strategy is a happy customer. Nothing beats word of mouth. Ask your best customers for testimonials for your marketing materials.

Can you work with your competitors to expand the market? Turn competitors into allies. Work with them on joint marketing programs that build awareness of your goods and services. Choose business partners who share your values.

What’s your bottom line? Nonprofit managers and activists often worry that their social goals will be corrupted by commerce. They fear that the “money tail” will start wagging the “mission dog,” and that they will risk the quality of their work or their reputations in pursuit of cash.

This legitimate concern is easily addressed by putting your mission first. If a prospective venture doesn’t fit your values, don’t do it. And if no one is passionate about the project, don’t do it. Without energy and commitment, even the most lucrative ideas will fail. Successful ventures are all about love, not money.

http://www nhi.org/online/issues/124/fundraising.html

This article is adapted from Andy Robinson’s new book, Selling Social Change (Without Selling Out): Earned Income Strategies for Nonprofits, available from Jossey-Bass,(800)956-7739, www.josseybass.com/nonprofit. Andy can be reached at andyfund@earthlink.net.
<table>
<thead>
<tr>
<th>Who</th>
<th>What</th>
<th>When</th>
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<th>Notes</th>
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<tbody>
<tr>
<td>Ellen, Heather, Staff</td>
<td>Clearly identify exciting and fundable programs within VOCAL and write case statements for them.</td>
<td>Nov 2009-March 2010</td>
<td>6 case statements</td>
<td>Grants/solic.</td>
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<td>a. Co-Op program support/Capacity building</td>
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<td>b. Veteran's program</td>
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<td>c. College program</td>
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<td>d. Efforts to Outcomes</td>
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<td>Ellen, Staff, Board</td>
<td>Identify Friends and Family to approach for donations</td>
<td>Nov 2009-Dec 2010</td>
<td>100 F &amp; F “asks”</td>
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<td>300 letters out</td>
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<td>b. Dine and Donate</td>
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<td>c. Amazon</td>
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<td>First quarterly “ask”</td>
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<td>Appeal to membership/mailing list/providers re: conference</td>
<td>April 15, 2010</td>
<td>800/1500 requests</td>
<td>Direct, Email</td>
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<td>$500</td>
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# My Very Own Fund Development Plan 2010-2013

<table>
<thead>
<tr>
<th>Who</th>
<th>What</th>
<th>When</th>
<th>Goal</th>
<th>Notes</th>
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Now that the Money is Pouring In...

How Do We Keep Track of It?

One of the first things to do is establish a protocol for handling money that comes in as donations. What a great problem to have! Here is VOCAL’s protocol.

Fundraising Protocol UPDATED • January 22, 2010

1. Vocal Operational Protocol: Accepting and Processing Donations

The Executive Assistant will accept and record checks and cash in DonorPerfect, and then make the deposit. The Development Director will accept and record online donations, Paypal and credit cards. At least once a month the Executive Assistant will check the Paypal balance at Donate@VocalVirginia.org and transfer the balance to the VOCAL bank account.

At least once a week the Development Director will generate IRS-acceptable “Thank You” letters. Gifts under $5 will only be acknowledged via email. On occasion, the Fundraising Coordinator may request the Executive Director or a Board Member to write a personal Thank You letter to a donor.

At the end of the calendar year, all donors who have given a cumulative total of $250 or more will get an end-of-year tax statement with a listing of their donations. This letter will be produced and mailed by the Development Director.

2. Vocal Operational Protocol: Credit Card Acceptance

Vocal is committed to maintaining the security of donor and customer information, including credit or debit card information that is provided to Vocal. Vocal will apply best security practices to protect against the exposure and possible theft of account and personal cardholder information by complying with credit card company requirements for storing, processing, and transferring payment card information.

This policy applies to all Vocal staff, contracted employees, or others who process, transmit or handle cardholder information in physical or electronic format on behalf of Vocal. This policy also applies to any affiliated organizations with cardholder information that is processed through Vocal, Inc.

The use of cardholder data for any purpose other than conducting Vocal business is expressly prohibited. No employee, contractor or agent who obtains access to cardholder data may sell, purchase, provide, or exchange the information in any form to any third party other than to an approved acquiring bank, depository bank, Visa, MasterCard or other credit card company.

Access to cardholder data is restricted only to those employees who need it to fulfill their job responsibilities, currently the Development Director and Executive Director.

Storage, Transmission and Disposal of Cardholder Data

Sensitive cardholder data [i.e., full account number, card type, expiration, PIN, and the card validation code (three-digit or four-digit value printed on the front or back of the card) must not be stored in electronic or paper form subsequent to transaction processing.

Printed receipts or other physical materials containing cardholder information must be stored in a secure environment until they are processed. Secure environments include locked drawers and safes, with limited access by authorized individuals only.
VOCAL Fundraising Protocol, continued....

Should it be necessary to print or display payment card information, all but the last four digits of the primary account number should be masked (not printed/displayed). The full primary account number and expiration date should never be printed or displayed. Cardholder data must not be transmitted in an insecure manner, such as wireless, email, or fax.

Payment card information must be disposed of in a secure manner. Printed receipts or other physical materials containing cardholder data must be shredded subsequent to transaction processing at www.MyVirtualMerchant.com.

Monitoring Fundraising income
The Development Director should check donate@vocalvirginia.org at least once a week to make sure gifts get entered into DonorPerfect.

Reporting Income
At the end of each month, the Development Director will generate a monthly donation report from Donor Perfect in Excel format.

Steps:
1. Go to MyVirtualMerchant to see settled batches
   > Settled Batches
   > Main
   > Reports (specify dates)
2. Enter these donations into Donor Perfect.
3. Go to Donate@VocalVirginia.org to see Paypal donations
4. Verify all Paypal and Credit Card donations have been entered into DonorPerfect.
5. Generate report from DonorPerfect.
   > Reports
   > Financial
   > Daily Log (set date)
   > Download to Excel
   > Insert CLASS Column after GL code

The Development Director will add a column to indicate what Class the income should be attributed to, send it to the Executive Assistant to check and forward on to the accountant.
Donor Software

VOCAL uses DonorPerfect online to keep track of our donors. We like it because it’s affordable and because we can access it online, and we don’t have to load software onto specific computers. If you have under 1000 names in your database, the cost is about $31/month.

Inexpensive Donor Databases
You don't need to spend a lot for fundraising software

By: Robert Weiner

It must seem like something of a Catch-22 to small organizations: You need to increase your funding, and fundraising software could help you manage your efforts. But the software packages you’ve heard of cost thousands, or even hundreds of thousands of dollars. If you could afford that, you wouldn’t need to worry about raising funds in the first place.

When your organization is desperate to bring in money, spending a lot for a donor database may not be possible. But it’s still important to track donors and their gifts, even if you can’t spend much money doing it.

Fortunately, you can find software that costs less than $500, and there are even free packages. Of course, don’t forget to consider the total cost of ownership when making decisions about acquiring new technology. A free database isn’t really free if it doesn’t do what you want to do, requires too much effort to use, or comes from a company that disappears when something goes wrong or you need an upgrade.

Donor Databases for Less Than $500

For this price, you’ll usually get a license that allows one user at a time to use your database. You may also be limited in the number of records you can store. Some of these products are designed for particular types of organizations, such as churches or clubs.

Keep in mind that TechSoup is not endorsing the software listed here. You need to make sure the software products -- and the companies behind them -- are right for your organization.

- Donation Solutions
- DonorAccess
- DonorPerfect Online
- Donor Records from Executive Data Systems
- Easy Gift from Summit Software
- Easy-Ware
- eTapestry (eTapestry is also available to qualified organizations for a small administrative fee)
- Exceed! Basic from Telosa (also available on TechSoup Stock to qualified organizations for a small administrative fee)
- FileMaker Donations
- FundRaiser Basic
- GiftWorks from Mission Research
- LifeLine from Straight Forward Software
- Membership Director from Advanced Data Solutions
- Membership Management System from Linked Software
- MemberTies from Myrr International
Donor Software, (con't)

So what do you do if you can't even spend $100? Don't despair, you still have choices. The following products are free:

- **BasicFunder** from Jellyware
- **The Compleat Angler** from Schoolbench
- **eBase** from GroundSpring (free for one user; also available bundled with FileMaker from [TechSoup Stock](https://www.techsoup.org/learningcenter/databases/archives/page10169.cfm) for qualified organizations)
- **eTapestry** (free for up to 500 records)
- **InfoCentral** (Open Source)
- **Metrix** (developed by the Fund for the City of New York)
- **Microsoft Access Donor Database**
- **Organizers Database**
- **Salesforce.com** (10 user licenses free to qualified nonprofits)
- **VisibleResults** (Open Source)
- **Willow Mountain Giving database**

**Choosing the Right Database**

Now for the hard part -- picking a product. Whether software is free or not, it must do what you need it to do. Try itemizing and prioritizing your needs. Then, after watching an in-depth demonstration of each one you're considering, you can compare your needs with what these packages deliver.

You also need to be comfortable with the level of technical support available for the product. With some of them, you'll be completely on your own. With others, you can pay the vendor or a consultant for support.

Some of these companies (particularly the ones that sell products instead of giving them away) will release upgrades and bug fixes for their software. With others, what you see today is all you'll ever get. If the product isn't being enhanced, you need to decide whether it will support your growth over the long-term.

Be sure to look at the documentation and training materials that are available for the product, and make sure that they'll meet your needs. A database can do more harm than good if you can't figure out the software and train your staff to use it properly. You should also look into whether there is a community of other users that you can network with and get help from.

Finally, check references for the vendor, assuming there is one. Ask about training, documentation, technical support, and general follow-through.
<table>
<thead>
<tr>
<th>Feature</th>
<th>FundRaiser Basic</th>
<th>eBase</th>
<th>Telosa Exceed! Basic</th>
<th>Fundraiser Select</th>
<th>eTapestry</th>
<th>Fundraiser Professional</th>
<th>GiftMaker</th>
<th>DonorPerfect</th>
<th>DonorPerfect Online</th>
<th>Telosa Exceed! Premier</th>
<th>Sage Fundraising 50 (formerly Paradigm)</th>
<th>Raiser’s Edge</th>
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<td>Membership / Ongoing Software Costs (for online programs only)</td>
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<td>$425/yr</td>
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<td><strong>Training</strong></td>
<td>None available</td>
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<td>$45/introduction course by consultant</td>
<td>$250/person three part training</td>
<td>$25/session</td>
<td>Purchase training libraries $125 or $300 per group session + trainer travel expenses</td>
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<td>variety</td>
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<td>$1200/person standard</td>
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<td>Months free support with purchase</td>
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<td>100+</td>
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<td>Can generate specialized reports</td>
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<td>Can access via internet</td>
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<td>Tickler reminders</td>
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<td>Pledge tracking</td>
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<td>Volunteer Management</td>
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<tr>
<td>Can customize with modules/add-ons</td>
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Information for this report was gathered from marketing materials on company websites, conversations with sales representatives, and public forums on the Tech Soup website.

***Blackbaud offers promotional pricing packaging for small nonprofits.

Programs may offer different levels of access to data to different users.

The capacity to provide these functions varies greatly between programs.

$ = extra charge for additional module.
Donor Software Data Entry Screen
Donors give to your organization because they believe you are making a difference in a cause they care about. They value your work and want to support you in changing the world. Their gifts are investments in the work they expect you to accomplish.

So it follows that results are the best way to show your recognition and appreciation for your donors. Most donors don’t need plaques or trinkets, which often cause donors to question your spending priorities.

Donors want to see what their gifts allowed you to accomplish -- specific facts and stories of how they changed the lives of real people. This is how they will know their money was put to the best use in your programs and services.

They want to hear about the women they helped shelter from domestic violence, the lonely senior citizens whose lives are brightened by your daily visits, or the inner-city children who were inspired by their first encounter with organic gardening at your community farm. Tell your supporters, in person if you can, or through newsletters, e-mail, and phone calls, how someone’s life was changed by the programs they made possible.

In addition to stories, do not underestimate the power of facts and statistics on donors. Share as much detail as you can about the progress you have made, the number of people you have expanded to reach, and the effectiveness of your work. Explain the statistics that show the impact your orchestra program has on the math scores of the children you serve, the track record of your life skills program, the number of affordable houses you have built for struggling families, or the percentage of the troubled teens who go on to graduate from college after participating in your mentoring program.

Instead of fancy baubles or plaques, find inexpensive and personal ways to thank your donors and connect them to your mission. Have the students from one of your classrooms hand deliver a scroll of paper with their handprints and thank-you messages; stop by with a rescued dog and pictures of the abused animals the donor helped rescue; or send a simple personal letter from a staff member or volunteer with a signed photo of the grateful recipients of your organization’s services.

Whether yours is a complex research program, a public policy group, or a local health services clinic, there is a compelling way to recognize your donors with the facts about what their money allowed you to do and the firsthand stories about the lives it changed. By recognizing and honoring your donors this way, you will make lasting friends. This deeper recognition of the difference they make is the thanks they really want, and it will cause them to remain loyal to your organization for a lifetime and to keep asking, “How else can I help you?”

Terry Axelrod is the author of The Joy of Fundraising: How to Stop Suffering and Start Enjoying Asking for Money for Your Favorite Cause.
Your thank you letter to a donor concludes one transaction but, more importantly, it is a bridge to future support. Get the thank you letter right, and you are well on your way to future fundraising success. Here are 10 tips for making that thank you letter just right.

1. Get that thank you letter out the door quickly
Within 48 hours of receipt of the donation is ideal for getting that thank you letter in the mail. If that is impossible, aim for under a week. The sooner, the more impressed the donor will be, not to speak of being reassured that the donation got to you safely.

2. Do not just send a generic thank you letter
Personalize the thank you letter with the donor’s name, and write directly to the individual. Use personal pronouns and include information about the donor that you may know, such as how long they’ve been a donor, or that you enjoyed seeing them at the last annual event. Perhaps the donor has received an award or gotten a promotion. Feel free to add something about these events to your thank you letter.

3. Customize the thank you letter
Coordinate the thank you letter with the original appeal. Really, you should draft a template thank you letter when you are writing your appeal materials. Think of it all as part of one campaign. If the donation is in response to some other stimulus...perhaps an event you staged...relate the letter to that event. Think continuity for the donor. Coming full circle back to the appeal is reassuring to the donor and shows that you are taking the time to get it right.

4. Use the thank you letter to remind the donor of how you will use the donation
The thank you letter should help the donor visualize how the money will be spent. Include a sentence such as: “Your gift comes at a crucial moment, and will allow us to install personal computers in the dormitories for the children in our residential community. The computers have been anticipated eagerly by the children for the last six months. Now, thanks to you, they will become a reality.”

5. Have a real person actually sign the thank you letter
No digital signatures please for your thank you letter. Have your executive director, the board president, or a volunteer fundraising chairperson, sign the letter. Use a blue pen for the signature so that the recipient can tell that it is real.

6. Add a personal, hand-written note to the thank you letter
If appropriate, ask the Executive Director or Board President to add a personal note to the thank you letter. This is especially gratifying if it is a long time donor who knows the leaders personally.

7. Include a reply envelope with the thank you letter
You don’t need to ask for a donation in the thank you letter. Just including the envelope will remind the donor that future donations are welcome. Many donors will keep these envelopes and use them for a donation later...or even right away.
8. Use the thank you letter as the donor’s tax letter
The thank you letter can serve the purpose of a receipt if you choose. You must provide a receipt annually for tax purposes, and you can include that disclosure with this letter. You can also wait until the end of the year to send the tax letter. That way, you will have two contacts with the donor. Some donors prefer to receive disclosure letters at the time they are thinking about and gathering documents for their tax returns.

9. Use the thank you letter to invite more engagement
Provide an invitation in the thank you letter to connect again with your organization by inviting the donor to visit or tour your site. Not many will actually do it, but they will appreciate the offer. For those who do take you up on the invitation, it will be a great opportunity to see how your organization makes a difference.

10. Provide a contact name in the thank you letter
Provide the name and telephone number/email address of someone in the organization that the donor can contact with questions. Be sure that the person named is really available and knows that they might be contacted.

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5 Creative (And Low Cost) Ways to Thank and Recognize Your Donors
By Sandy Rees

Recognizing and acknowledging donors is a critical step in getting the gift. It might be considered the final step in receiving a gift, but it is actually the first step in getting the next gift. Consider using these 5 creative ideas to honor and thank your donors.

1. Thank your donor 7 times. There’s nothing more important than thanking our donors. We need to make sure donors know how much we appreciate them and their generosity. So thank your donor 7 times. The 7 Thanks don’t have to be elaborate or expensive - just sincere.

The initial Thank You should be timely. Your quick response to a donor’s gift lets them know that you did in fact receive their gift and that you are glad to have it. Ideally, you should get an initial Thank You letter out within 48 hours of receiving a gift. There’s nothing worse for a donor than waiting weeks or months for a gift acknowledgment.

Subsequent Thank Yous may be spread out over several weeks or months. Letting a little time go by between Thank Yous shows the donor that you haven’t forgotten about them. And, it helps you build a relationship.

Ideas for the 7 Thank Yous:
- Computer-generated letter
- Hand-written note card
- Phone call
- Email
- Call or note from the Executive Director
- Call or note from a Board member
- Call or note from another staff member (NOT a Fundraiser)
- Note from a client
- Photograph of your organization in action
- Written update about the use of the donor’s gift

2. Engage your Board in the recognition process. Board members often want to help you, but they are unsure how they can help. Consider using these ideas:
- Ask Board members to write Thank You notes, especially to donors they know. A personal note from a peer or friend is a powerful acknowledgment for a donor.
- Ask Board members to make Thank You calls to donors. Provide them with a script and just a few names to call (maybe 3 or 4). Give them a target date to complete the calls (i.e., within the next 2 weeks). And ask them to respond back to you when they are done with any comments the donor made
or any observations they have. Make a call with them if they are apprehensive about getting started.

• Ask Board members to act as a host or hostess to a specific donor at a Thank You event. The Board member can provide one-on-one attention to a special donor and can introduce him to other Board members or donors at the event. A trained Board member can effectively cultivate a donor and glean valuable information about the donor’s attitude toward your organization.

3. Harness the power of the Thank You call. One of the most powerful tools you have is on your desk – the telephone. Making a Thank You call to a donor can be a powerful way to say thanks. It says to the donor that you took time to pick up the phone and call them. Not many organizations do this these days, so your donors might be shocked! Here’s an easy script for a Thank You call:

A. Say the donor’s name and then identify yourself and your organization. “Mrs. Smith? This is Sandy Rees from the Save the Universe Foundation.”

Your donor is likely to be suspicious. They probably think you are about to ask them for something.

B. Tell them why you are calling. “We got your check in the mail today and I’m calling to say Thank You.”

You’ll probably hear relief and surprise in the donor’s voice.

C. Pause.

Don’t say anything. The donor will likely gush about how great your organization is or why they made the gift. You may want to make a note of their reasoning, especially if they indicate a favorite program or feature of your organization.

D. Invite the donor to share information with you. “Is there anything you’d like me to relay to our Executive Director for you?”

Often, the donor will be floored that you want to know what they think and that their comments will go all the way to the top. Of course, you are obligated to actually share their comments with your ED! Assure the donor you will pass their comments on.

E. Thank the donor again. “Thank you so much for taking a minute to talk with me. And thanks again for supporting our work.”

That’s it! Call is done. These calls usually only take 3 or 4 minutes and will pay off big!

4. Involve your whole staff in thanking your donors. Consider using these techniques for involving other staff in the acknowledgment process.

• Ask program staff to write a note or letter to the donor to let them know how their gift is being used. “Front-line” stories are exactly what donors want to hear!
• At a staff meeting, pass a card around and ask everyone to sign it along with a one line thank you message. Send the card to the donor.
• Ask staff to provide tours to donors when they visit.

5. Pay attention to the special recognition needs of some donors. Some people want to be recognized and some don’t. You have to know your donors well enough to know what would be meaningful to them. Corporate donors tend to want all the recognition they can get, while individual donors usually do not want a big fuss made over them.

Here are some things to keep in mind when recognizing donors.

• Keep it simple and inexpensive.
• Recognize corporate donors in their offices.
• Make sure the recognition is meaningful to the donor.
• If you have anything printed, make sure you have spelled the donor’s name right and used the right name.

Always be on the lookout for simple and meaningful ways to thank and recognize your donors and you’ll be well on your way to fundraising success.