

Fundraising Content

Information

- Introduction
- Don't think too small!
- A New Way of Thinking About Fundraising
- Can Governmental Agencies Conduct Fundraising Activities?
- Establishing a Private, Not-for-Profit Agency to do Fundraising
- Grant Writing
 - Private Foundations and Corporate Giving
 - Components of a Proposal
- Direct Mail Campaign
- HIPAA and Fundraising

Tools

- Examples of Funding Sources: Advantages & Disadvantages of Each
- Making the Case
- Getting Over the Fear of Asking
 - Exercises
 - What's the Worst That Can Happen?
 - Why I Would Say Yes and Why I Would Say No
- Asking for Major Gifts (donations)
- Fundraising Event Ideas
- How to Conduct Special Events

Resources

Fundraising Information

Introduction

Expanding the funding situation for family planning programs is important for the sustainability of these services in the community. The financial health of family planning programs is often a concern for management and some have little experience in this area. Family planning agencies have fixed costs associated with their operations (such as rent or mortgage; equipment; some staffing positions and benefits; taxes; and insurances such liability, malpractice and property). Family planning programs also experience attrition with clients who move or go to other providers.

Therefore, it is important for family planning programs to continually improve their financial situation and recruit new users. The Region VIII Family Planning Grantees identified fundraising as an important element to include in this tool kit, according to the assessments conducted during the social marketing project and more recent discussions.

This Introduction to Fund-Raising section contains information on funding sources, grant-writing and special event fundraising activities.

Don't think too small!

Not-for-profit organizations too often think small when it comes to fundraising possibilities and opportunities. It is okay to have small events that might be considered more marketing than fundraising and it is okay to think big – target individuals who can give larger amounts of money. There are several family planning agencies that have galas or a nice evening event (reception, silent auctions, music, dancing, etc.) and some have raised significant funds (one agency reported raising \$60,000).

What works best is to get as much of the event costs underwritten by businesses and individuals. Then the sale of tickets is clear to go to your agency as program related income.

A New Way of Thinking About Fundraising

How you spin your fundraising effort can make a difference in its success. Organizations do not have needs. Believe this and your fundraising effort can be successful. Many efforts fail because they are based on the premise that the more desperate you appear for funds, the more successful your efforts will be. Try taking out a mortgage by pleading poverty to your lender—it's most likely not going to happen. Don't look for needs in your agency—look for opportunities to serve people, and meet the needs of your community.

A community may have needs and people may have needs: healthcare, education, infrastructure, etc. Society has problems: poverty, social injustice and hunger. As people in the health care service industry you see the needs of your community and its residents.

Your family planning agency becomes the solution to one or more of these needs that you have identified. Go one step further. Your agency has a competitive fundraising edge that will surpass *the need to satisfy peoples' wants* – you are the experts in women's health, family planning and reproductive health. To become successful at fundraising, you need to leverage opportunities on behalf of your community.

Seek investment, NOT charity. People grow weary of giving handouts. Therefore based on the rule above, a successful fundraising effort will invite individuals to make wise investments into programs of benefit to the community. You must be good stewards of the money given, and must be gracious to those whom have given it. However, in most cases, people give in order to get something. Get what? This can include a number of things:

- The need to know one is contributing to society
- Recognition: This includes being seen with the right people at a special event, having your name appear in print or on a recognition wall, having a room (such as a treatment room or office or break room) named in honor of the donor
- Financial benefits: “Remember your gift is tax-deductible!” (for 501(c)3 agencies)

Examples of fundraising based on community problems and opportunities

An issue in your community might be the need to serve women with disabilities and your agency needs a new exam table that will accommodate this. A fundraising campaign is initiated by staff and board members to help address the problem (currently not serving women with disabilities) to present an opportunity to address this need (purchase an exam table).

Teenage pregnancy may be a problem in your community and you would like to market abstinence-based educational materials but need funds to purchase these items. A fundraising campaign, with the help of volunteers, can focus on the issue (teenage pregnancy) and the effort to address this (educational items distributed to parents, schools and teens).

Think back to the last time you gave money. Consider the reason. Whatever the reason, two things happened: you were asked and it was in your interest to give. Learn about how people ask for money and how those who are asked respond – this can help you discover how to be an effective fundraiser.

(Source: Hayden Morrison working with Christy Crosser for the Rural Hospital Performance Improvement Project)

Can Governmental Agencies Conduct Fundraising Activities?

Yes – providing there are no regulations stating otherwise. Public agencies or governmental agencies, such as county health departments, are allowed to participate in and conduct fundraising, according to their state and local laws, regulations and guidance. The challenge is not often the regulations, rather the staff's experience, knowledge, skills and confidence in fundraising.

It is advised that staff from governmental agencies who are interested in fundraising check with their county for any regulation or guidance. Also, check with the family planning grantee.

One notable difference is that donations from individuals or organizations to governmental agencies are not tax-deductible; unlike donations to 501(c)3 tax exempt agencies (such as the Wyoming Health Council or Planned Parenthood Association of Utah).

Establishing a Private, Not-for-Profit Agency to do Fundraising

Establishing a not-for-profit, private agency, 501(c)3, is one way to address the fundraising issue for government or public agencies. Check to see if there are any currently established private agencies that you might be able to partner with or learn from to establish your own agency.

If you plan to establish a private, not-for-profit agency, you should have a good grasp of the following areas before your begin.

Understanding—have a clear picture of the economic and social conditions of your community.

Knowledge—be aware of other organizations in your area that might be involved in similar issues (e.g., United Way, American Cancer Society).

Expertise—find individuals from within your community that can advise you on local laws that govern the not-for-profit sector.

Accounting—identify the person or institution that will guide you in appropriate tax laws and particularly fund management.

Connections—look for advice and models from other fundraising organizations in your area, including family planning programs.

Many states have not-for-profit support organizations. Your best source for identifying these will be either the Secretary of State's Office or your State Library, or through the Internet.

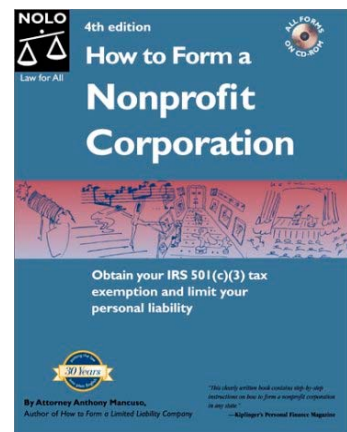
Establishing a not-for-profit organization, whose sole purpose is raising money for the “parent” organization, varies by state. However, the following brief checklist and explanations should guide your thinking as you plan for this.

- ✓ Get an Attorney. You can do some work yourself, but get legal advice and guidance. For example, you can do a lot yourself to establish a corporation (there are lots of resources online) and to establish your tax-exemption and tax-deductibility status. You should have some basic guidance and advice from a lawyer who understands not-for-profit business. It is important how you characterize your plans when filing for incorporation with your state and/or for tax-exemption and/or tax-deductibility with the IRS, otherwise, your new organization may be deemed a for-profit or you may have to pay federal taxes (among other taxes) on your income. In addition, there are various reports and filings you may have to submit. Ask other not-for-profit organizations, a local funder, your board or the local bar association for references to good lawyers.
- ✓ Find an Accountant. You will want to secure an individual that is familiar with not-for-profit accounting, in particular, fund accounting. There are many issues that will need to be addressed by an accounting professional, including how your chart of accounts will reflect fundraising activities, and how you account for pledges, stocks, property, grants, donated goods, etc. You will also need to set up a separate bank account. To aid an accountant, there are a variety of software titles available that are geared solely toward the small fundraising organization (e.g., *Paradigm* by JSI). Selecting a software package will depend on your needs, personnel and available hardware.
- ✓ Recruit Board Members.
- ✓ Draft Articles of Incorporation and Obtain Board Approval. These specify a legal description of your organization and the powers of the board; you'll need to draft these only if you plan to file for incorporation. The board must approve the Articles before submission. The attorney will be able provide guidance. Template Articles are available.
- ✓ File or Incorporation with State. Register for incorporation including submitting your drafted and approved Articles. Most of the time you will be required to submit bylaws (templates are available for these online, in business software applications, from the local library or other not-for-profit organizations).
- ✓ File for Federal and State Tax-Exemption. Your board should approve this before filing. Federal filing is done through the IRS, but the office responsible for state filing varies. Your accountant will be able to assist with this.

Resources

The internet and libraries have information regarding how to start a not-for-profit organization.

How to Form a Nonprofit Corporation
by Anthony Mancuso



Grant Writing

Private Foundations and Corporate Giving

The most important success factor in seeking funds from foundations and corporate grantmakers is doing the necessary research and preparation. A major element in successful grantseeking is finding the appropriate match between a program's needs and a donor's interests.

Contact the funder to request a copy of its written guidelines and/or its latest annual report, or check the funder's website. As foundations and corporations increasingly place their applications guidelines, annual reports, and other documents online, the initial prospect identification phase of grant writing becomes easier. See the resource section for contacts.

Once you've prospected foundations and corporations to find some potential matches, you'll need to gather more information about the funder's guidelines and policies to see if they are still a good fit for your organization. A funder's guidelines and policies will provide detailed information about the types of organizations and projects it does and does not fund and what to include in a grant proposal for their organization. Most funders want the same basic information, although some may prefer that you fill out their application forms or cover sheets. If you have difficulty finding information about a foundation's funding guidelines, you can try reading its federal informational tax return, called a Form 990-PF, which all foundations are required to file with the IRS each year. The 990-PF can sometimes help you learn more about a foundation's grants, programs, and missions.

Federal funding usually has specific requirements to be found on the Request for Proposals issued by the applicable government agency.

Sources: www.grantproposal.com/resources_inner.html and www.mcf.org/

Grant Writing Basics – Components of a Proposal

The following guidelines should meet the needs of most funders, or guide you when approaching a funder with no written guidelines.

Components of a Proposal (in order)

Source: www.foundationcenter.org

Executive Summary - an umbrella statement of your case and summary of the entire proposal – 1 pg

Statement of Need - explain why this project is necessary - 2 pages

Project Description - the nuts and bolts of how this project will be implemented and evaluated - 3 pg

Budget -financial descriptions of the project plus explanatory notes (budget narrative) - 1 page

Organizational Information - history and governing structure of the non-profit, its primary activities, target audience, and services - 1 pg

Conclusion -summary of the proposal's main points - 2 pg

If you've done thorough research on a grantmaker and believe that your organization or project is a good fit with the funder's guidelines, it's time to apply to the organization for a grant. A written grant proposal is the primary tool that most funders use for making grant decisions. Read the grantmaker's application guidelines carefully to determine how to apply to the organization for a grant. A few funders allow and/or require you to apply for a grant online at their website. Other funders may ask that the first step you take in applying for a grant is to write a "letter of inquiry", which is a one or two page letter in which you describe your organization and the proposed project. Others will ask that you submit a full grant proposal from the start.

The grant proposal is your opportunity to communicate to the funder who you are, why you are seeking a grant, what you plan to do with the money, and why you are a good fit with the funder's priorities.

If you've never written a grant proposal, don't feel intimidated. Grant writing is a skill that can be learned, and there are a number of grant writing resources that are available to help. Many websites provide tutorials on writing a successful grant proposal.

Funders have different review processes and schedules. Some organizations review grant proposals just once a year, while others review them on an ongoing basis. Many funders list their typical turnaround time for a grant application in their application materials.

If your proposal is funded, you may receive the check in the mail with a cover letter, or you may get a contract. If a funder turns down your request, you will probably receive a form letter. If you still feel there's a good match, you may want to apply again in about a year; many applicants are only successful on the second or third try! Seeking grant money can be time-consuming and at times frustrating but many funders have board and staff members who are willing to help and advise you.

Direct Mail Campaigns

A direct mail fundraising program (building a list of donors who give regularly by mail) can contribute to the financial sustainability of your organization. Direct mail can be inexpensive and easy compared to some other means of delivering fundraising messages. Direct mail can be conducted year-round, nurturing and sustaining relationships with donors. Direct mail can be targeted, sending different messages at different times to different groups, as well as personalized. The 'annual campaign' or 'membership drive' are examples of direct mail fundraising. Mal Warwick and Associates, Inc. describes the challenges and rewards of direct mail fundraising below.

Ten Most Important Things About Direct Mail Fundraising

1. **Process** - direct mail is a process, not an event.
2. **Long-Term** -- rewards come only over the long haul. The real return on investment may be sizable bequests you receive years later. A successful campaign requires a number of opportunities for donors to become involved.
3. **Cost-Effective** -- the cost of a direct mail fundraising project is much less important than its cost-effectiveness. Sometimes it makes sense to spend more on your top donors, spending less on inactive or less generous donors.
4. **The List** -- the most important aspect of any direct mail fundraising campaign is the list of people you mail to.
5. **The offer** -- next in importance to the list is the offer you make in a mailing - for example, how much money you ask for, how you say the money will be directed, and what benefits (tangible or intangible) you promise in return. The most common kinds of mailings are annual fund or membership renewals, special appeals, and donor mailings. Each type features a distinctive offer.
6. **Segmentation** -- in segmenting a mailing, you select some donors to be included and some to be excluded. The most important criteria about who gets what are the recentness, frequency, and donation amounts of your donors, and the means by which you originally recruited your donors.

7. **Annual Giving** -- successful direct mail fundraising is built on the foundation of an annual giving or membership development program. In a membership program, the renewal series is the key-using a series of 3,5, or more successive contacts with each member, you can persuade the largest possible number to renew their membership each year.
8. **Testing** -- by testing alternative lists, packages or other techniques, you can make incremental improvements in results over time.
9. **Repetition** -- repeating themes, slogans, and logos is necessary to get your message across. Repetition of familiar words and images will reinforce what you're saying.
10. **Record-keeping** -- with consistently accurate and timely record-keeping, your organization will gain the advantages of direct mail. To be effective, the direct mail campaign demands an investment of time and thought, as well as money in an efficient computerized record-keeping system.

Source: <http://malwarick.com>

Health Insurance Portability and Accountability Act (HIPAA) and Fundraising

HIPAA is about protecting health information of your clients. HIPAA includes regulations regarding fundraising. However, family planning programs are generally not conducting funding uses the protected health information of clients.

HIPAA requires the you obtain an authorization from individuals, if you are using their protected health information to raise funds. Individuals have the right to opt out of any further fundraising communications. Limited protected health information, such as demographic information can be used with business associates and 501(c)3 charitable foundations.

Fundraising Tools

Examples of Funding Sources: Advantages and Disadvantages of Each

| Source | Advantages | Disadvantages |
|--------------------------|--|---|
| INDIVIDUALS | <ul style="list-style-type: none"> ✓ Largest source of giving ✓ Ongoing source one can build ✓ Once a giver, also an advocate ✓ Volunteers may be potential donors | <ul style="list-style-type: none"> ✓ Costly to develop, small return per individual unit ✓ Hard to generate unless broad-based direct service appeal ✓ Risky for the inexperienced ✓ Need significant assistance from the organization's board and volunteers |
| LARGE FAMILY FOUNDATIONS | <ul style="list-style-type: none"> ✓ Source of large sums of money ✓ Accessible, professional staff ✓ Clear guidelines, process ✓ Most likely to research your request ✓ Board volunteers can help, although not always key | <ul style="list-style-type: none"> ✓ Usually only start-up funds ✓ Lengthy process ✓ More difficult to access through personal influence ✓ Proposals required may be more lengthy |
| COMMUNITY FOUNDATIONS | <ul style="list-style-type: none"> ✓ Much like large-family foundations | <ul style="list-style-type: none"> ✓ Host of foundations within foundations ✓ Most money is earmarked for special interests/funds |
| SMALL FAMILY FOUNDATIONS | <ul style="list-style-type: none"> ✓ May fund ongoing operating expenses ✓ Personal influence with board members helps ✓ Guidelines very broad ✓ Often less strict about proposal format | <ul style="list-style-type: none"> ✓ Hard to access, limited professional staff ✓ Often not large sums of money ✓ May not be possible without personal influence |

| Source | Advantages | Disadvantages |
|---|---|---|
| LARGE CORPORATIONS/ CORPORATE FOUNDATIONS | <ul style="list-style-type: none"> ✓ Can be contributor of significant funding ✓ Smaller amounts of funds may be ongoing ✓ Often accessible, professional staff ✓ May be tied to volunteer involvement ✓ Business strategy may be evident ✓ Source of cause-related marketing | <ul style="list-style-type: none"> ✓ Large amounts of funds aren't on- going ✓ May be hard to get around staff ✓ Must be within their guidelines ✓ Not likely to contribute without local headquarters or public consumer base ✓ Often want board representation |
| SMALL CORPORATIONS | <ul style="list-style-type: none"> ✓ Very informal approach ✓ Money may be ongoing ✓ Personal connections will suffice ✓ Neighborhood focus advantageous | <ul style="list-style-type: none"> ✓ Small amount of funding ✓ Narrow range of interest ✓ Personal contacts are key |
| FEDERATED FUNDS (United Ways, Combined Health Appeal) | <ul style="list-style-type: none"> ✓ Steady source of relatively large amount of funding ✓ Clear process ✓ Professional staff, can be agency staff driven | <ul style="list-style-type: none"> ✓ Generally start-up organizations not funded ✓ Must be social service and fit priority focus ✓ Very lengthy entry process ✓ May be very time-consuming as must be part of yearly fund-raising process, with periodic in-depth review |
| GOVERNMENT | <ul style="list-style-type: none"> ✓ Large amount of funding possible ✓ Process is clearly defined ✓ May be source of ongoing funding ✓ Political clout helps | <ul style="list-style-type: none"> ✓ Application procedures may be long, tedious ✓ May only pay by unit of service, fluctuates ✓ Unspent monies may be returned ✓ Difficult record keeping |
| CHURCHES AND ORGANIZATIONS | <ul style="list-style-type: none"> ✓ Often looking for group projects | <ul style="list-style-type: none"> ✓ In-kind services most likely ✓ Need to fit their service focus, neighborhood or religious outlook |

Source: Credit to Ellen M. Hatfield of the Twin Cities in Minnesota
<http://www.mapfornonprofits.org/>

Making the Case

Making a case is about setting the tone for fundraising. The case should answer the following questions:

- ❑ Who is the organization and what does it do?
- ❑ Why does it exist?
- ❑ What is distinctive about the organization?
- ❑ What must be accomplished?
- ❑ How will this campaign enable it to be accomplished?
- ❑ How can the donor become involved?
- ❑ What's in it for the donor (i.e., why should they give to this effort)?

Components of the Case

- ❑ Mission
- ❑ Vision
- ❑ History
- ❑ Statement of community problem
- ❑ Goals of the campaign
- ❑ Objectives to meet these goals
- ❑ Programs and services
- ❑ Staffing
- ❑ Governance
- ❑ Facility needs
- ❑ Endowment
- ❑ Budget for the campaign
- ❑ Statement of needs
- ❑ Gift range chart
- ❑ Named-giving opportunities

The case needs to be both rational and emotional. The case should be compelling, but not too emotional. There is a fine line between urgency and desperation - a line that the case for support cannot cross. It must appeal to both the head and the heart.

Source: Harold J. Seymour, in *Designs for Fundraising*

Getting Over the Fear of Asking

Grassroots Fundraising Journal by Kim Klein

Kim Klein recommends you take some time in your organization to explore feelings and anxieties about money in general and asking for money. This can help with fundraising and collections. The following are three exercises that will help you do that. To do the exercises, you will need a blackboard or easel paper and markers.

The first step in getting over your anxiety about asking for money is to remember that you weren't born with this anxiety, and that what you have been taught about money perpetuates a system that, in the rest of your work, you are trying to change. Take some time in your agency to discuss your personal experiences with money – what each person learned as a child, and what they think now. This does not have to be a heavy, deeply personal discussion. The purpose of the following exercise is to take some of the "charge" out of the word money and help get some distance from it.

Each person in the group takes a minute or two by themselves to write down the answers to two questions:

1. What is your earliest memory of money?
2. What messages, ideas and attitudes about money were conveyed to you by parents, peers, and others in your community?

Next, people pair up and each person takes a couple of minutes to tell their partner what they have written. After a few minutes, the group comes back together and people share key points, with someone writing them on a flipchart or blackboard. You'll probably hear such things as:

| | |
|--|--|
| Money talks | Don't ask for it |
| Money doesn't grow on trees | We never had enough of it |
| Money doesn't buy happiness | Money is power |
| We were taught to give it to "the needy" | Never ask someone what their salary is |

Looking at the list, notice how many of the messages are negative or about privacy and power.

Next, the group discusses what a healthy attitude toward money might look like by considering together the following questions:

1. In an ideal world, what would people be taught as children to think about money?
2. How would this change how we feel about money as adults?

Again, record answers on a flipchart. At the end of this discussion, compare this list to the previous one. You'll probably see what a healthy attitude might include and what people learned as children are very different.

What's the Worst That Can Happen?

- The prospect will say no
- The prospect will yell at me
- The prospect will give me the money, but won't really want to, and will resent me
- I will feel too nauseated to continue
- I know the prospect doesn't have the money
- It is imposing on our friendship for me to ask, and we won't be friends any more
- The prospect will think that the only reason I was nice to her was to get money
- The prospect will say yes, then ask me for money for his cause
- I don't know if my group really deserves the money as much as some other groups might
- The prospect will ask me questions about the organization that I can't answer
- Can I live through these?
- Can I change these?

Consider these statements and reasons. What will your prospects likely say to you? How will you respond?

Why I Would Say Yes

- Like the person asking
- Believe in the cause
- Get something for my money
- Tax deduction
- I feel generous
- Just got paid
- Know my money will be well used
- Want to support my friend
- Feel guilty saying no
- Know other people in the group
- Don't have time to volunteer, so give money
- Like the approach

Why I Would Say No

- Don't believe in the cause
- Don't have the money
- Bad mood that day
- Organization has a bad reputation
- Give to other things
- Already been asked several times that week
- Don't know what my money will be used for
- Think person asking is naive or pushy

Asking for Major Gifts (donation)

Getting Major Gifts: Grassroots Fundraising Journal Reprint Collection, Third Edition, 2000 The Fine Art of Asking for the Gift by Kim Klein

Many people have discovered that doing face-to-face fundraising reminds them of the true depth of their commitment to the organization. They remember why they became involved in the first place and why they think the work is important. Occasionally, people discover that their commitment is not that strong and they would be happier in another organization.

First and foremost, it is imperative that the people soliciting major gifts believe thoroughly in the cause of the organization and have demonstrated that commitment with a financial contribution. The size of that contribution is not important, but it must be a contribution, which for that individual is significant. The message to the prospect from the solicitor is, "Join me. Do what I have done. Give a large contribution to this organization because it is really important."

Types of Prospects

There are three types of prospects for face-to-face solicitations:

- People who have given before, and are prospects for a repeat or upgraded gift
- People who have not given before, but are close to someone in the organization
- People who are interested in the cause but don't know anyone in the organization.

For the latter type, some kind of cultivation is necessary before actually soliciting the gift. Inviting the person to a special event, house meeting, or educational evening will be important, or asking to see the person in order to describe the program and inviting him or her to the office (if the office is an exciting place) should precede the meeting at which a gift is requested. In this article, we will assume that the prospect is ready to be asked for the gift.

Approaching the Prospect

There are three steps in approaching the prospect:

1. A letter describing the program and requesting a meeting to discuss it further.
2. A phone call to set up a meeting.
3. The meeting itself in which the gift is usually solicited.

Obviously, if you are approaching your spouse or your best friend, you can skip the letter, and perhaps even the phone call. In some cases the letter will be enough and there will be no need for a phone call and meeting; in others a phone call alone will suffice.

The Letter

The letter to prospects who have given before is the simplest. You thank them for their support in the past and ask them to give the same amount or more again. Describe some of your achievements in the past year and some of your future plans. Tell them you will phone them in a few days and, if they are in your area, offer to meet with them. Enclose a stamped, return envelope.

In a few days, phone them. Often you will discover that the check is in the mail. As you get to know major donors better, you will discover which ones prefer not to be phoned, but just wish to be reminded when it is time to renew their gift.

If you do meet with them, ask for a larger gift than they gave last year, or use the meeting as an opportunity to ask for the names of other people who might be interested in giving major gifts.

As you get to know the donors, you can see if they would make good board members, or if they would be willing to solicit some large gifts for your organization. Meeting with current donors tells people that they are valued and helps build their loyalty to the organization.

Letters to prospects you know rest heavily on the amount of respect and affection the prospect has for you. When writing to someone you know, use the same tone and format you would use in writing to him or her about anything else. If you normally call the person by his or her first name, do that in your letter. Mention to your friend that you are a donor yourself. You don't have to say how much you give—just the fact that you give will tell your friend that you are asking him/her to do only what you are already doing.

If the person who knows the prospect is unable or unwilling to write the letter, then the person actually soliciting the gift may be a stranger to the prospect. In that case, begin the letter with "Jane Friendswithyou gave me your name. She said you will be interested in our work because..." Go on to describe the work of the organization and ask to meet with the person.

Indicate in the letter that you will be asking for money. The letter can describe how much the organization needs and what kind of gift you hope the prospect will make.

In writing the letter, remember that people have a short attention span. Make your sentences interesting, evocative, and short. Avoid using jargon or complicated explanations. Statistics are fine, if used sparingly. The idea of the letter is to spark the prospect's interest so that he or she will want to meet with you. The letter does not have to convince fully, and in fact, should just raise the person's interest. The face-to-face meeting is the time to convince the prospect to give.

The Phone Call

If you say you are going to call, call. Rehearse the phone call beforehand to anticipate possible hard questions or objections the prospect might have. The following are three different problems that arise during phone calls and examples of how they could be handled.

Scenario One:

The Easy Prospect

You: Hello, this is Worthy Cause. Is this Mary Prospect?

Ms. Prospect: Yes, it is.

You: I recently wrote to you about....Did you get my letter?

Ms. Prospect: Yes, I think I did.

You: Do you have a minute now? (Or, Is this a good time to talk?)

Ms. Prospect: I have just about one minute. Now remind me of what your organization does. I get so many letters.

You: Our organization...(two sentences at most). What I would really like to do is get together with you for about half an hour to explain our project in more depth. I know you are busy, so is there any time next week that I could come see you?

Ms. Prospect: I think I could fit you in next Wednesday at 10.

You: Great. I'll be there. Thanks so much.

Scenario Two:

Time and Logistics Problems

Ms. Prospect: This is really a bad time of year for me. I'm doing an inventory and then I have to fly to Washington, D.C. and I just can't fit in another thing.

You: I can certainly understand that. Why don't I call you next month and see if things have settled down, and you might have some time then?

Ms. Prospect: That would be fine.

Or:

Ms. Prospect: This is just too busy a time for me. I'll call you when I can work you into my schedule.

You: I know you have a lot on your mind. I'll call you in a month or so to see if things have settled down.

Or:

Ms. Prospect: I never make decisions to give away such large gifts without talking it over with my husband. We do all our giving jointly.

You: That seems extremely reasonable. May I come and talk to you both?

Scenario Three:

Disagreements with the Organization

Ms. Prospect: I got your letter, but I have to tell you honestly that I think the government should be taking care of this, and you all should be lobbying for restored government funding in this area.

You: We agree that the government should be taking care of this problem, and we're working with a coalition of groups to pressure for restored funding. But in the meantime, these people are without services, and we have to turn to people like you who understand the need so clearly. I'd like to talk with you about our government strategy, since I know that it is an area of interest to you, in addition to discussing our program. Could we meet next week?

Or:

Ms Prospect: Aren't you the group that had to fire your Executive Director for incompetence a little while ago?

You: Yes, our Executive Director was released when the board discovered...I know you'll be pleased to learn that Much Better Person has taken her place and things are now completely back to normal. I really want to talk about our programs in more detail. Is it possible to set up a meeting in the next few weeks?

Or:

Ms. Prospect: I have other priorities at this time and I'm not sure your organization falls within my present commitments.

You: I know that you have other priorities. I would really appreciate it if we could discuss our organization's program because I think it falls within your concerns. Jane Friendswithyou indicated that you are strongly committed to...and we do work in that area now.

Ms. Prospect: I'm afraid you'll be wasting your time.

You: I'm not worried about that. I don't want to waste your time, but I do think a brief meeting would help us both to see if we have any goals in common.

The Importance of Being Assertive

Most of the time when people put us off we assume that they are trying to say no, but are just too polite to come right out with it. This is a false assumption. Prospects are looking for signs that you are really serious about your organization. They appreciate persistence, assertiveness, and an attitude that what you have to offer is critically important and worth taking some time to discuss. If you are easily put off and take the first "no" as the final answer, it says to the prospect that you are not terribly concerned about the organization, or that you don't really care whether or not the prospect gives. Clearly, you don't want to be rude, but be willing to push the prospect a little, and don't take the first resistance as the final word.

The Face-to-Face Meeting

Once you have an appointment you are ready to prepare for the face-to-face solicitation. This is not as frightening as it seems. First of all, the prospect knows from your letter or your phone call that you will be talking about making a contribution. Since he or she has agreed to see you, the answer to your request is not an outright "No." The prospect is considering saying "Yes." Your job is to move him or her from "I'm considering giving" to "I'd be delighted to give."

The purpose of the meeting is to get a commitment to give. Everything else revolves around this purpose. It is fine for the conversation to go off on a tangent, but you must keep bringing the conversation back to the financial needs of the organization and the possible role of the prospect in meeting those needs.

As the solicitor, you must appear poised, enthusiastic, and confident. If you are well prepared for the interview, this will not be too difficult. Many times, board members and volunteers are afraid they will not appear knowledgeable about the organization. It is perfectly fine to bring along a staff member or someone who has been with the organization a long time to answer difficult questions. Sometimes going with a partner also helps you feel more relaxed. It is also fine to answer a question with, "I don't know, but I'll be glad to get you that information."

Help the prospect to see that giving to your organization is a logical and natural extension of his or her interests and concerns. Ask the prospect questions, and carry on a conversation with him or her. "Do you agree with our approach?" "Did you see the article about us in last week's paper?" "Has Jane Friendswithyou talked much about our organization?"

When you finally ask for the gift, look the prospect right in the eye and in a clear, bold voice, say, "Can you help us with a \$300 contribution?" or, "We are hoping you can give \$500-\$1000." Keep looking at the prospect, and don't say anything after you have asked for the gift. It is the prospect's turn to speak. Although it may seem like a long time between your request and his or her response, it is only a matter of a few seconds.

Sometimes the prospect will say, "I'd like to help, but that figure is way out of my range." Your response can be, "What would you feel comfortable giving?"

After you ask for the gift and get an affirmative answer, discuss how the prospect wants to make the gift. Perhaps they will give you a check right there, or mail it in the return envelope you brought. For larger gifts, prospects (now donors) may want to transfer stock, or make other arrangements that will cause the gift to arrive in a week or two. Once these arrangements are made, thank the donor and leave.

Immediately after the interview, send the donor a thank you note. Another thank you from the organization should be sent when the money arrives.

Summary

Although it can be anxiety producing to ask for money the first few times you do it, it is thrilling to get an affirmative commitment from a major donor. It is also a good feeling to know that you were able to set aside your own discomfort about asking for money for the greater purpose of meeting the needs of your organization. Knowing that you can talk comfortably about the financial goals of your organization is empowering. Boards of Directors find that they are immeasurably strengthened when each of their members feels able to ask for money.

Reprinted from *Getting Major Gifts*, a publication of the Grassroots Fundraising Journal

Give before you ask others to give

Staff, volunteers and board members should all contribute to your organization and should be asked to give a donation before they ask others.

Fundraising Event Ideas

Source: Fundraising Ideas & Products Center

Auctions

An auction can be combined with any event, a spaghetti dinner, cookout, cheese and wine tasting party, etc. or held on its own. Supporters donate their time, talent or treasures which are auctioned off to the highest bidder. Examples of time or talent include: x hours of yard work, housework, knife sharpening, a romantic dinner for 2, mystery supper for 8, water ski lessons, piano lessons, a room painted or wallpapered, knitting lessons, handyman for a day, homemade pies, baked goods, etc. Treasures can be handmade or not, crafts, decorative items, meals, trips, concert or sports tickets, golf green fees, and other items.

The key to a successful live auction is to have a good auctioneer, preferably one willing to donate their services. He/ she does not need to be a professional or a fast talker, like at a stock animal or car auctions. Some group member with the gift of gab and a sense of fun, knowledge of the expected audience and possibly of the donors as well, can be very successful. A good auctioneer can generate bids for even the most unlovable object, and foster bidding wars for the popular items. It is important to let the auctioneer know the number and character of the items to be auctioned so ample time is allowed for the big-ticket items, and everything is auctioned within the allotted time span. The auctioneer should be given a complete description of each item as it is presented for auction. (Small typed index cards are suitable for this purpose. Be sure to include the item number for easy reference.) Several helpers are needed to move items to and from the "stage" or from wherever the items are auctioned.

Helpers are needed to register bidders and assign numbers at the start of the event. Card fans or large index cards can be used as bid numbers. Just be sure the numbers will be clearly legible to the auctioneer or helper. Each bidder (or couple, if desired) should be given their bid number and a listing of all items to be auctioned. Additional helpers are needed during the auction to record the winning bid number and amount on the master list of items; and to collect the bid amounts and distribute the items at the end. It can be helpful to prepare a separate index card for each successful bidder and maintain a running list of purchased items, identified by number and bid amount. These cards can be quickly totaled for easy checkout, with method of payment (cash or check), and delivery or auctioned items noted. The card totals should be balanced against the annotated master list and any discrepancies reconciled, hopefully before bidders "check out".

Golf Tournaments

Make arrangements with a local golf course to host a golf tournament. Arrange for reduced green fees to be paid by your organization and solicit donated prizes for winners. Arrange for volunteers to handle registration, watch holes, and act as referees regarding rules of play. Charge per 2-person team, more for foursomes. You'll need to arrange the golfers into 'flights' using established handicaps or other criteria.

Yard Sale

Enlist staff and supporters to run a yard sale on behalf of the clinic.

Guess The Number of Condoms In the Jar

Fill a large jar with colorful condoms or other items, and set it out conspicuously in the clinic. Place a sign next to the jar challenging visitors to guess the number of condoms (or whatever) in the jar. Participants are given the opportunity to guess and pay for each guess (you decide the amount). Make sure the signage explains what the proceeds will be spent for.

Movie Night

Enlist the support of a local movie theater to hold a cinema night as a benefit to your organization. Offer supper or hors d'oeuvres and libations, or other food/drink that attracts an audience in your area. If possible, select a film that has local significance, and invite the screenwriter, director, or actor to attend the event.

Radio Days/Nights

Ask a local radio station to reserve one day or night each year for your volunteers to read commercial advertisements which your organization has previously sold to area merchants. While reading the ads live, volunteers can tell the radio audience about your organization and what you do in the community.

"Don't Come" Event

Do you ever feel that at times you would rather not go to a function? You feel that you would rather stay at home, relax and help out a really good cause by doing so? Then a **Don't Come Event** is something that you should seriously consider using as a fundraising event. Imagine how good people will feel towards you for saving them the effort or inconvenience of attending another time consuming function with boring speeches and people that they might not want to see again quite so soon or at all. Here is the perfect fundraising activity for the busy people who appreciate a good idea when they see one and like to support good causes.

What you do is send a humorous invitation to an event that will never take place. This is a novel way of asking for a donation. The invitation must be clear in explaining that the event will never take place and why it is to your invitee's benefit not to come to an event they have paid for.

The invitation must be appealing and very presentable so some invitees might consider having it framed and put on display. Furthermore it is a low cost method of getting your message out in a very friendly manner. If constructed properly the invitation should be able to be used as a conversation piece. Be original and use your imagination. Since the event will never take place you can have it anywhere, anytime and it won't cost anything extra.

To reduce the cost of the invitations approach a printer to donate the cost of the printing by allowing them to have their name somewhere on the invitation.

Who do you invite? The major advantage of this type of event is that you are freed from the restraint of only appealing to your membership! You can invite ANYONE who you think might support your cause. Make sure you include some media personnel because you might get some free publicity.

Depending on your available funds, send out as many invitations as you deem appropriate. Just keep in mind that you will not get a response from every invitee. Work on the expectation that only a percentage will respond and from there send out enough invitations that will probably secure enough positive responses to make the activity worthwhile.

After the invitee has paid for his ticket(s), issue a Thank You note for their non-attendance. Again re-affirm all the benefits the invitee has enjoyed by their non-attendance mentioned in the original invitation.

Where possible include a speech by the guest speaker who also did not attend. If the guest speaker is fictional, a cartoon or movie character, you have the choice of having a long print out of meaningless gibberish as a speech or include a genuine speech on a topic related to your fundraising organization.

If the guest is a celebrity who is lending their name to your event then you have a choice of asking them to prepare a genuine speech or have an approved speech ghost written on their behalf. A genuine celebrity lending their name to a speech supplied in writing on request is another good reason that invitees can use to support your activity.

Number 01 of 100

We have reserved a place for

(NAME OF GUEST)

at our

(YOUR NAME)'S ANNUAL DON'T COME FUND-RAISING
DINNER

on July 31st 2003 at the (some place exotic)

Promptly at 6:00 AM

Please show this card to the non-existent
usher to be seated promptly

Guest of Honor, (be creative), Speaking on
'Why Don't Come Events Can Save Your Life'

\$ per plate

Dress Code: Black Tie

Donation enclosed Y/N

Please send me a copy of the main speech Y/N

Source: Grassroots Fundraising

How to Conduct Special Events

Details can be found on the Fundraising Ideas and Products Center Web site – see resources. Reprinted from *Fundraising for Social Change* by Kim Klein, Fourth Edition

Fundraising for Social Change, Fourth Edition (Oct. 2000) by Kim Klein

This is only a small section of an excellent article that provides significant detail on conducting a special event.

Special events, also often called “fundraising benefits,” are social gatherings of many sorts that expand the reputation of the organization, give those attending an amusing, interesting, or moving time, and possibly make money for the organization sponsoring the event. The variety of special events is practically limitless, as are the possibilities for money earned or lost, amount of work put in, number of people participating, and so on.

Because of their variety and flexibility, special events are excellent strategies for acquiring, retaining, or upgrading donors, and organizations serious about building a broad base of individual donors need to have at least one or two special events every year. Special events are both the most common fundraising device used by small organizations and the most misunderstood. They can do things for an organization that no other fundraising strategy can do as well, yet what they can best do is often the last thing that is expected or wanted

Special events should have three goals:

- To generate publicity for the organization
- To raise the visibility of the organization
- To bring in (new) money

Generating publicity means getting a particular audience to pay attention to the organization for a limited time by means of advertising the event and by the quality of the event.

Enhancing visibility raises the overall profile of the organization in the community.

Raising money is a secondary goal for a special event because there are many faster and easier ways to raise money than this one. An organization that simply needs money will find that the slowest ways to raise that money are seeking foundation funding or having an event. On the other hand, an organization that wants to raise its profile, bring in new people, and possibly make money will find a special event an ideal strategy. In many cases special events can lose money or barely break even and still be successful because of the publicity and visibility they produced.

Types Of People Who Attend Special Events

There are two categories of people who attend events: those who come because of the event itself and those who come both for the event and to support your group. In the first category are people who would come to a particular event no matter who sponsored it. These people attend flea markets, dances, movie benefits, decorator showcases, auctions, and the like. Many times these people will not even know the name of the group sponsoring the event. In a similar vein are small businesses or corporations that will buy ads in an adbook, donate raffle prizes, buy tables at luncheons, or even underwrite an event, but would not give the organization money under any other circumstance. They want the advertising and resulting goodwill the event gives them, and the chance to target a specific audience cheaply. Raising money from a person or a business that would not give you money otherwise does not constitute donor “acquisition” but it is a smart use of an event, given that the event should also be designed to draw people who are interested in your group. For organizations in rural

communities or serving a very small constituency, and unable to build a large base of donors, events that draw people to the event rather than the cause will be imperative.

The second type of people who attend events are both interested in the event and believe in your group's work. They may not have heard of your organization before learning of this event, or they may already know of your organization and want to support it while getting something important to them. For example, women wanting to take a self-defense class may choose one sponsored by the local rape relief program rather than a commercial gym in order to support the rape relief program. After the classes, some of the participants may want to join the program as volunteers and paying members. People who buy all their holiday presents at a public radio crafts fair, or enter marathons sponsored by groups they believe in, are good prospects to follow up with direct mail.

Among the second type are people who appreciate your organization's work but can't afford or don't want to give more than a small amount. For them, buying a \$1 raffle ticket or attending a \$6 movie benefit is a perfect way to show their support.

Choosing A Fundraising Event

Several criteria should be considered in choosing a fundraising event, including the appropriateness of the event, the image reflected on the organization by the event, the amount of volunteer energy required, the amount of front money needed, the repeatability and the timing of the event, and how the event fits into the organization's overall fundraising plan.

Appropriateness of the Event

To decide if an event is appropriate, ask yourself, "If people knew nothing about our organization except that it had sponsored this event, what would they think of our group?" If you think the answer is "neutral or good," then the event is appropriate. If you think that you would want them to know more about the group than just what the event implies about it, you should think again. Examples of inappropriate events abound. In the extreme, if you are the symphony you don't sponsor a pie-eating contest; if you run an alcohol recovery program you don't have a wine tasting. Often, however, the question of appropriateness is subtler than in those examples.

Image of the Organization

In addition to being appropriate, the event as much as possible should be in keeping with the image of the organization or should promote the image the organization wishes to have. Although considerations of appropriateness sometimes include those of image, image is also a distinct issue. Many events that are appropriate for a group do not promote a memorable image of it. For example, a library would choose a book sale over a garage sale, even though both are appropriate. An environmental organization would use a whitewater rafting trip over season tickets to the ballet as a door prize, even though both are nice prizes. An organization promoting awareness of the problem of high blood pressure might choose a health fair over a dance. The idea is to attract people to your event who might become regular donors to your organization by linking the event to your mission.

Energy of Volunteers

Looking at the volunteer energy required to plan and mount an event involves several considerations. How many people are required to put on this event? What would these volunteers be doing if they were not working on this event? Do you have enough volunteers who have the time required to produce this event — not only to manage the event on the day of its occurrence but to take care of all the details that must be done beforehand?

Volunteer time is a resource to be cultivated, guided, and used appropriately. For example, don't use someone with connections to major donor prospects to sell T-shirts at a shopping mall on Saturday afternoon. Similarly, a friendly, outgoing person who loves to talk on the phone should be the phone-a-thon coordinator or the solicitor of auction items and not be asked to bake brownies for the food booth at the county fair. Obviously, what the volunteer wants to do should be of primary concern. People generally like to do what they are good at and be involved where they can be most useful.

Front Money

Most special events require that some money be spent before there is assurance that any money will be raised. The front money needed for an event should be an amount your organization could afford to lose if the event had to be canceled. This money should already be available — you should not, for example, use funds from advance ticket sales to rent the place where the event will be held. If the event is canceled, some people will want their money back. Events that require a lot of front money can create a cash flow problem in the organization if the need for this money is not taken into account.

Repeatability

The best event is one that becomes a tradition in your community, so that every year people look forward to the event that your group sponsors. Using this criterion can save you from discarding an event simply because the turnout was small the first time you did it. Perhaps you got too little publicity and only a handful of people came. If each of those people had a great time and you heard them saying, "I wish I had brought Juan," or "I wish Alice had known about this," then it may be worth having the event again next year. To decide if an event is repeatable, evaluate whether the same number of people working the same number of hours would raise more money producing this event again.

Timing

You need to find out what else is happening in your community at the time you want to hold your event. You don't want to conflict with the major fundraising event of a similar organization, nor do you want to be the tenth dance or auction in a row. If you are appealing to a particular constituency, you need to think of their timing. Farmers are mostly unavailable during planting and harvest seasons; Jews will not appreciate being invited to a buffet on Yom Kippur; gay men and lesbians may not come to a silent meditation scheduled during the Gay and Lesbian Pride Parade, and so on.

The Big Picture

The final consideration is the place of the event in the overall fundraising picture. If you find that the same people attend all your organization's events as well as give money by mail, you are "eating your own tail" and need to rethink how you are using events. If you cannot seem to get publicity for your events or you are unable to find an event to reach new constituencies, then maybe special events

is not the right approach. If, after analyzing your donor base, you decide that your organization needs to build its number of thoughtful donors, then you won't do as many events whose main purpose is acquisition. In other words, the results of special events (new names, publicity, new volunteers) must be fed into the overall effort to build a donor base or the effort of the event will have mostly been wasted.

How To Plan A Special Event

Special events require more planning time than one would imagine. Because so much can go wrong, and because many things often hinge on one thing so that one mistake can throw off weeks of work, events must be planned with more attention to minute detail than almost any other fundraising strategy.

The Committee for Special Events

There must be a small committee of volunteers overseeing the work for the event. Using paid staff time to organize a special event is expensive and does not help to train or involve volunteers in substantive fundraising tasks.

The job of the committee is to plan and coordinate the event, not to do every task. After planning the event, most of the committee's work is delegating as many tasks as possible. Large committees can be unwieldy and counterproductive. With a larger committee planning the event, it is likely that some important element will be left out, that the planning process will take longer, that the committee meetings will be like special events themselves, and that the committee members will quickly burn out.

Each special event should have its own committee, although there can be overlap from one event to another. Special events are labor intensive, however, and people need to have a rest period between events and a chance not to participate in every one. The committee must have staff and board support, and everyone must agree that the chosen event is a good idea.

Tasks of the Committee

There are three simple steps a special events committee should take to ensure the success of the event: Detail a master task list, prepare a budget, and develop a timeline.

1. Detail a master task list. On a piece of paper, make four columns labeled What, When, Who, and Done (see example on next page). Under "What" list all the tasks that must be accomplished. Include everything — even those things you are sure no one would ever forget, such as "Pick up tickets at printer" or "Send invitations to the board." Every minute detail should be on this list. Under the "When" column, note beside each task when it must be finished. Now put the list into chronological order, so that you have a list of things that must be done and the order in which to do them. After completing steps two and three, you will complete the "Who" column — to whom the task is assigned — and note the date the task is completed under "Done."

MASTER TASK LIST

| What | When | Who | Done |
|------|------|-----|------|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

2. Prepare a budget. On a piece of paper or in a spreadsheet program, make two sets of three columns as shown below:

BUDGET

| Income | Estimated | Actual |
|-----------------------|-----------|--------|
| Item | \$ | \$ |
| Item | \$ | \$ |
| Item | \$ | \$ |
| Total income | \$ | \$ |
| | | |
| Expenses | Estimated | Actual |
| Item | \$ | \$ |
| Item | \$ | \$ |
| Item | \$ | \$ |
| Total expenses | \$ | \$ |
| | | |
| Net | \$ | \$ |

Look at the master task list you just created. Put anything that will cost money in the column marked “Expenses.” Anything that will raise money is put in the column marked “Income.” When you have listed everything, subtract expenses from income to find the projected “net income,” or financial goal, of the event. The budget should be simple but thorough, so that all costs are accounted for and planned on.

As you budget, remember that an estimate is not a guess. If someone says, “The estimate for food is...” or “The estimate for printing is...” it means he or she has called several vendors for prices, bargained, and is satisfied that the estimate will be the price or very close to the price. As costs are incurred they can be noted under the column marked “Actual.” As much as possible, put off paying for anything until after the event is over and be sure you work in cancellation clauses for rentals or other contracts. For example, if a hall rents for \$600 with \$300 required as a deposit, try to reserve the right to get all or part of that \$300 back, if necessary, as close to the date of the event as possible.

Ideally, of course, you will aim to get as many things as possible given as in-kind donations, but don't budget to get anything free. Always put down a price in the budget. This will protect you in case you do have to pay for something you had planned to get donated, and also give you a cushion in case you have an unexpected expense.

3. Create a timeline. To ensure that you have thought of everything that should be done, and that you have allowed enough time to do everything, think “backwards” from the target date of your event. If you want to have a dance on August 10, what would you have to do on August 9? To do those things, what would you have to do in early August? What would have to be in place by July 15? And so on, back to the day you are starting from. By this “backward planning,” the committee may find out that it is impossible to put on the event in the time allowed. In that case they must either modify the event or change the date. Thinking through each week's tasks for the timeline may also surface expenses you hadn't thought of, or additional tasks. Add these to your task list and budget.

As you plan, remember to take into account that, although there may be 90 days between now and the event, there may be only 60 “working” days because of schedule conflicts. For example, if a number of your volunteers have children, you should check a school calendar to make sure you don't need anything done on the first or last day of school, or during a vacation, or on commencement day. Few organizations can have a New Year's party as a fundraiser simply because they cannot get anyone to work during the two weeks preceding New Year's Day.

Establish “go/no go” dates. On your timeline, you will notice that there are periods of intense activity and lulls throughout the time leading up to the event. The periods of intense activity, where several tasks must be accomplished and each is related to the other (i.e., design, layout, proofread, print, and mail invitations), are called “task clusters.” These groups of tasks must be accomplished as projected on your timeline. The date by which each cluster must be accomplished is a “go/no-go” date. At those dates, evaluate your progress and decide if you are going to proceed with the event or if you are too hopelessly behind or too many things have gone wrong and you should just cancel or modify the event. Go/no-go dates can also be set for goals to determine if the event will be successful, such as how many tickets you should have sold, or how many ads in the adbook you should have acquired, or how many underwriters you should have lined up.

Once the committee has prepared the task list, the budget, and the timeline, they are ready to assign tasks to other volunteers. When you ask volunteers or vendors to do things, give them a due date that is sooner than the one in the “When” column of your task list. That way, in the best case you will always be ahead of your schedule; in the worst case — if the task is not completed — you will have some time to get it done.

The Evaluation

The final step in planning a special event is evaluation. Within a few days after the event, the planning committee should fill out an evaluation form, as illustrated on the next page. Save this evaluation along with copies of the advertising, the invitations, and any other information that would be useful for next year's planning committee.

The evaluation will allow you to decide whether or not to do the event again, and will also ensure that the same number of people working the same amount of time will raise more and more money every year. It should not be necessary to create the planning documents described above more than once. Once you have created them, every year a new committee can modify and add to them, but each committee is building on the knowledge and experience of previous committees.

SPECIAL EVENT REPORT (EVALUATION FORM)

Approximately how much time did the committee spend on this event? (In evaluating this, try to subtract time spent fooling around and be sure to count time members spent driving around on errands and on the phone.) _____

Did this event bring in any new members? _____ How many? _____

Can people who came to this event be invited to be members? _____

Did this event bring in new money? _____

Does this event have the capacity to grow every year? _____

What would you do exactly the same next time?

What would you do differently?

List sources of free or low-cost items and who got them and indicate whether these items will be available next year, in your opinion:

What kind of follow-up needs to be done? (For example, thank-you notes written to people who went out of their way to help you, bills paid, prizes sent to those who weren't there at the drawing, tablecloths or platters returned to those who loaned them, etc.)

Which committee members did what work?

Which committee members would be willing to work on this event next year?

Other comments:

Fundraising Resources

Management Assistance Program for Nonprofits (MAP)

Our purpose is to build the capacity of nonprofit organizations to achieve mission-driven results. Since 1979, we have provided quality, affordable management consulting and board recruitment services to thousands of nonprofit groups.

<http://www.mapfornonprofits.org/>



Fundraising Ideas & Products Center



<http://www.fundraising-ideas.org/>

Grassroots Fundraising

<http://www.home.qil.com.au/~dnash/>



The idea of this website is "adopt and adapt". If you like an idea, adopt it as your own and adapt it to your unique circumstances with hard work and common sense. Nowhere on this site will you find detailed solutions to your fundraising problems, what you will find is plenty of ideas. Ideas that hopefully will either help you get started or fire you up for another go.

The Foundation Center's mission is to support and improve philanthropy by promoting public understanding of the field and helping grantseekers succeed.

<http://www.fdncenter.org>



Grant Writing Resources for Private Foundations and Corporate Giving

As foundations and corporations increasingly place their applications guidelines, annual reports, and other documents online, the initial prospect identification phase of grant writing becomes easier. The following websites are helpful resources:

Private foundations - comprehensive annotated links to foundations can be searched by subject, location, or alphabetical order at:

http://fdncenter.org/grantmakers/gws_priv/priv.html

Corporate giving - comprehensive annotated links to corporate giving web sites. Can be searched by subject, location, or alphabetical order at:

http://fdncenter.org/grantmaker/gws_corp/corp.html

Print resources: If you can afford to make the investment in reference materials, guidebooks, and fundraising resources, The Foundation Center directly sells grant maker directories, regional directories, specific funding directories, online databases, CD-ROM databases, fax-on-demand foundation profiles, and books on the nonprofit sector: www.fdncenter.org/marketplace/catalog/index

Grant writers should pay attention to articles about trends in philanthropy, foundation giving patterns, and the nonprofit sector in general. The Chronicle of Philanthropy <http://www.philanthropy.com/index.html> is the leading subscriber fundraising newspaper.



Newspapers and press releases from nonprofit organizations may provide insight into the priorities of targeted prospects, often with more detail than you might find in typical lists of grant recipients. In addition to investigating the grant making guidelines of foundations and corporations, grant writers often research biographical information about the original benefactor, foundation trustees, program officers, and corporate executives.

A funder's guidelines will tell what to include in a grant proposal for their organization. Most funders want the same basic information, although some may prefer that you fill out their application forms or cover sheets. Federal funding usually has specific requirements to be found on the Request for Proposals issued by the applicable government agency.

Source: www.grantproposal.com/resources_inner.html

Achieving Excellence in Fund Raising

Henry A. Rosso, & Associates
November 1991, Jossey-Bass

Planning Special Events

James S. Armstrong
February 2001, Jossey-Bass

The Association for Healthcare Philanthropy

<http://www.go-ahp.org/>

The organization provides resources geared toward fundraising professionals in the health care field. Web site contains conference information, guides, and articles.

Grantmakers In Health

<http://www.gih.org/>

Grantmakers in Health's mission is to support foundations and corporate giving programs in their efforts to improve the health of the nation. The organization provides technical assistance, consulting services, conferences, and training to promote healthcare philanthropy.

COMMUNITY RESOURCE CENTER



<http://www.crcamerica.org>

New Workshop

Techno Grantwriting Tools You Can Use

Dates: July 15, November 18

Streamline your grant writing process by using CRC's ONLINE Colorado Grants Guide to research and identify which funders are most interested in funding your organization. You will learn time-saving "tricks of the trade" and how to complete the Common Grants Application to produce successful grant proposals. Classes will be held in Denver-area computer labs. Call (303) 623-1540 for more details.

Federal Assistance Monitor

<http://www.cdpublications.com/pubs/federalassistance.php>

Semimonthly Report on Federal and Private Grant Opportunities

Federal Assistance Monitor features a comprehensive review of federal funding announcements, private grants, and legislative actions affecting community programs, including education, economic development, housing, children and youth services, substance abuse, and health care. Each grant notice is categorized by subject matter.