



Preparation

Take a few minutes and write down five words or phrases that come to mind when you think about fundraising

Think about these definitions from seasoned fundraisers:

“I think of fundraising as a way for a person to leave a legacy. . .to make their world a better place because they existed.”

“Fundraising is an opportunity for donors to make a difference in their communities and in their own lives.”

“Fundraising gives others the chance to support a cause that I believe in.”

“Not everyone can be hands on in solving the community’s problems. But almost everyone can support the mission through donations. And, that makes the donor feel good.”

Now, write your new and improved definition of fundraising:



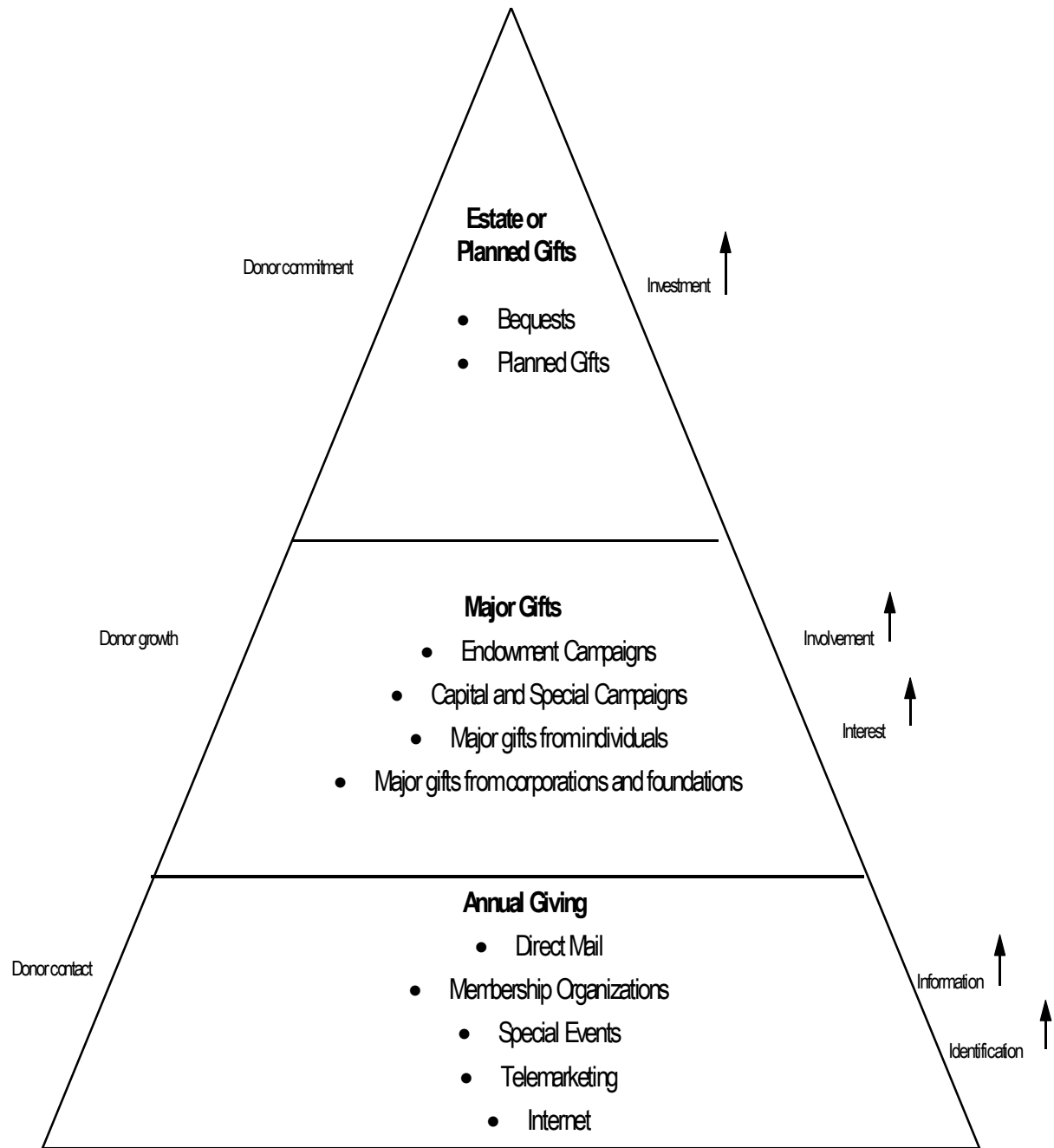
Are you ready?

Fiscal	yes	no
◆ Does your organization have an annual budget, approved and monitored by the board?		
◆ Does your organization have monthly expenditure and revenue statements?		
◆ Does your organization have yearly audits?		
◆ Is a written statement of your organization's financial position available to potential funders and donors?		
◆ Are your primary funders secure for the next three years?		
◆ Does your organization protect restricted income?		
◆ Are you running a deficit, and, if so, will you be able to eliminate within a year?		
◆ Do you have a financial surplus?		
◆ If you have a financial surplus, is it unrestricted money?		
◆ Do you receive more than 30% of your funds from one source?		
◆ If yes, is it unrestricted?		
◆ If yes, is it renewable?		
Board of Directors		
◆ Do you have board members who are recognized leaders in the community?		
◆ Does the board provide clear leadership?		
◆ Does the board fundraise?		
◆ Do your board members have relationships that they can leverage to provide additional resources?		
◆ Is the board stable?		
Staff		
◆ Do you have enough staff to implement present programs?		
◆ Do you have adequate administrative and support staff?		
◆ Do you have adequate development staff?		
◆ Do you have leaders on staff that works effectively with the board to implement goals and objectives?		
◆ Do you have staff that can assist in fundraising?		

Evidence of Community Support	yes	no
◆ Community leaders on the board of directors?		
◆ Receive donations form individuals?		
◆ Receive cash/in-kind donations form local businesses?		
◆ Have a large number of people accessing your services?		
◆ Have recognition by the press, government or other agencies?		
◆ Have an active volunteer base involved with your agency?		
◆ Maintain a file of positive testimonials from clients, members, volunteers, etc.		
Documented Program Success	yes	no
◆ Do you have valid, reliable and successful outcomes?		
◆ Do you have a track record of providing successful outcomes over time?		
Organization Health	yes	no
◆ Is your organization financially stable?		
◆ Does your board give money, as well as time, to the organization?		
◆ Are you getting funds from a diverse array of funders/donors?		
◆ Are your staff and board well-qualified?		
◆ Is there a continuing demand for your agency's services?		
◆ Do you work collaboratively with other agencies?		
◆ Do you provide a unique service in your service area?		

¹ Adapted from *Fundraising Readiness: How Does Your Agency Stack Up?* by Brigette Sarabi. The Grantsmanship Center Magazine, Summer '97.

Pyramid of Giving



The pyramid of giving is a visual tool for you to identify the different phases that the average donor goes through. It also gives you a quick overview of the different fundraising products available to an organization and how you can find the right mix of products to insure success.

Stating Your Case



The case statement is the basis for your fundraising plan. Simply put, a case statement tells explains to potential supporters what your organization is and what it does, why it is important, and how the prospective donor can help. If the board has engaged in the visioning and planning processes, then writing a case statement should not require much more effort, as the information will already exist in other formats. A good case statement is brief, simple, and tasteful. Break it down into the following simple steps.

First, Who are you?

Describe your history. Tell the reader about your organization as concisely as possible. Explain where you work, the neighborhoods where your nonprofit works, the location of offices and the number of staff. Include information on why your organization was founded and who was instrumental.

Second, Why does your organization exist? What problems do you address? How severe are these issues?

State your mission. Assure your audience that your organization's work responds to real needs. Use specifics, such as, "We renovated seven houses last year, and we are on line to renovate another 10 this year."



Third, What makes your organization uniquely qualified to lead this effort? Quantify your organization's experience and the expertise of your staff, board and volunteers.

Fourth, What programs and activities do you propose to help solve the problem? What can you realistically hope to accomplish?

State the objectives of the specific program for which you are raising funds. Describe how accomplishing these objectives will address real needs. Show how your nonprofit can accomplish these objectives.

Last, How much will it cost to solve the problem? Include the estimated cost of ignoring it.

Describe and substantiate your program costs as well as your request for support. Outline plans to generate other revenue, including other fund raising.

Keeping your database house in order



Good People and Good Systems = Good Database

A practical, simple, adaptable database comes not from a computer program, but from people who understand the importance of gathering information and of thinking proactively, and who are dedicated to keeping the information up-to-date.

Limit the Number of Databases You Create

The more databases you create, the harder it is to cross-reference information. Under this system, if your board member moves, you have to change his or her information on several separate databases. It's not time or cost effective. You should have only one for tracking people/customers. Your accounting staff may need their own for vendors, bills and payroll; your program manager may need one to track projects and their progress; etc. But anything that relates to your membership, customers, volunteers, donors, etc. should be kept in one, centralized database.

Capture Everyone

The purpose of your database is to GROW. Everyone/anyone who calls, comes to a meeting or event, asks for information, is sent material about your company, etc., should be put on the database, because those people are the best audience to approach about volunteering, donating, attending an event, etc., because they've voiced an interest in your organization already! Develop a system that everyone will use to capture this information, and make sure this information is inputted in a timely manner -- a good rule is that new information is inputted into your database no more than 48 hours after it was received by the organization.

Who's In Charge

If you have under ten (10) staff people, only one staff person should have the responsibility of inputting, changing or deleting information to the database. This cuts down on duplicate records, information conflicts, etc. If more than one person is inputting information, you need to create a category that will track who inputted what. However, EVERYONE should contribute information for the database; all staff members have a responsibility to provide important names, address changes, etc. for the database.

Universal Access

While one person may be in charge of the database, everyone on staff should have at least limited access to it (looking up phone numbers, generating and printing reports, etc.).

The Information Needed Most

What information do you need from people now , and what information might you need for the future? Only you can decide what categories of information you need -- just remember that a good database serves all of your organization's departments: program, communications, resource development, etc. Here are some basic, general suggestions for information categories for a membership database:

- first name
- last name
- salutation
- name tag first name
- mailing address
- day phone
- evening phone
- fax phone
- e-mail address
- ethnicity
- date entered into system
- date information was last updated
- affiliation/agency/company
- referred by
- contribution(s) (include date given)
- participation category/ies (events attended/project involvement/etc.)
- do not send mail category

(for former members/customers who do not want to receive materials)

*if nametags are generated from this database, this is an important field -- someone who wants their mail addressed to "Stephen" may want to be verbally addressed as "Steve", for instance.

Be Able to Sort Information

A good computerized database should allow you to sort and view information in a variety of ways. For instance, you might want to generate :

- An alphabetical list of education representatives who attended your Fall fund raiser
- Personalized letters to donors who have contributed more than \$100
- A sheet of mailing labels for a particular city or county, sorted by zip code
- A phone list of people interested in a specific activity by your organization

Basic Overview of Databases at <http://www.coyotecom.com/flat.html> includes tips on what to look for in database software, should you be looking to buy such.

This information on databases came directly from an article by

Jayne Cravens
Coyote Communications
Services for Not-For-Profit Organizations and Public Sector Agencies
jcravens@coyotecom.com <http://www.coyotecom.com>