

Fundraising Training



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1. Where does money come from?
 2. Can I be a fundraiser?
 - a. Joan Flanagan exercise
 - b. Finding your inner fundraiser
 3. Can my friends group raise money?
 4. What is our plan for fundraising?

Hand-outs included:

1. Finding Your Inner Fundraiser
2. Initial Questionnaire
3. Fundraising Planning Worksheet
4. Sample Fundraising Plan Template
5. Blank Fundraising Plan Template

Appendix:

Benefits of Partnering for Corporations

53 Ways for Board Members to Raise \$1,000

Assessment Tool

Finding Your Inner Fundraiser:

A SELF-ASSESSMENT TOOL

Created by Stephanie Roth & Kim Klein of the *Grassroots Fundraising Journal*

One of the common reasons (or excuses?) given by board members and other volunteers as to why they can't participate in fundraising is that they don't know how. Explaining that fundraising is not so complicated, but based on basic common sense and a willingness to interact with people isn't always enough to encourage them to try it.

Here's a tool to help your potential fundraising team understand that they already have skills and experience that can be applied to fundraising. We created this assessment form to help board members, volunteers and other prospective fundraisers identify their areas of interest and talent for different types of fundraising strategies.

Generally, fundraising strategies encompass the following types of activities: asking someone directly for a gift, social gatherings, and selling something.

- **Asking someone directly for a gift:** Although these are the most challenging strategies to implement because they require you to feel comfortable asking for money for your cause, they also generate the most money for the time involved in carrying them out.

- **Social gatherings:** These are activities that bring people together — at someone's home, in a larger public setting, or to carry out a pledge-raising event, better known as some kind of “-thon” (such as a walk-a-thon).

- **Selling:** With these strategies, the donor makes a purchase and receives — or has the chance to receive — something tangible for their gift. This could be a chance at a prize (as in a raffle), publicity for their business (such as in an ad book), or a clean car (in the case of a car wash).

The self-assessment tool presented here correlates certain skills and preferences to these three types of fundraising strategies. It helps identify activities many people have done that are not fundraising activities per se, but that require skills similar to those needed for fundraising.

When people using this tool tally their responses at the end, they can see the type of fundraising activity they seem most suited to based on their responses to the 10 questions. For example, are they most suited to a fundraising task that involves asking someone directly for money? Would they feel more comfortable selling something, such as a raffle ticket or an item at a garage sale? Or are their preferences and talents more along the lines of organizing an event that brings people together to celebrate and support the work of the organization?

Share this self-assessment tool with your fund-raising team — it may even generate some enthusiasm to join your fundraising efforts.

Fundraising Strategy Self-Assessment Tool

The following questions can help you identify the kinds of fundraising activities you would have the most fun with, as well as ones that require skills you already have. For each, put a check mark next to the appropriate answer, then follow the instructions for using the Tally Your Results section.

1. I've organized large (more than 30 people) birthday parties, weddings, or similar kinds of events.

IF YES: I... ☐ *enjoyed* ☐ *didn't mind* ☐ didn't like the experience

IF NO: I... ☐ *would be willing to try it* ☐ would rather not try it

☐ Check here if your response was one of the italicized ones — then go to “Tally Your Results” (below) and circle #1.

2. I work (or have worked) in sales.

IF YES: I... ☐ *enjoyed* ☐ *didn't mind* ☐ didn't like the experience

IF NO: I... ☐ *would be willing to try it* ☐ would rather not try it

☐ Check here if your response was one of the italicized ones — then go to “Tally Your Results” and circle #2.

3. I have gone door-to-door in my neighborhood for some kind of cause (political, social, fundraising).

IF YES: I... ☐ *enjoyed* ☐ *didn't mind* ☐ didn't like the experience

IF NO: I... ☐ *would be willing to try it* ☐ would rather not try it

☐ Check here if your response was one of the italicized ones — then go to “Tally Your Results” and circle #3.

4. I do or have done public speaking.

IF YES: I... ☐ *enjoyed* ☐ *didn't mind* ☐ didn't like the experience

IF NO: I... ☐ *would be willing to try it* ☐ would rather not try it

☐ Check here if your response was one of the italicized ones — then go to “Tally Your Results” and circle #4.

5. I have or have had jobs (paid or volunteer) that required close attention to detail.

IF YES: I... ☐ *enjoyed* ☐ *didn't mind* ☐ didn't like the experience

IF NO: I... ☐ *would be willing to try it* ☐ would rather not try it

☐ Check here if your response was one of the italicized ones — then go to “Tally Your Results” and circle #5.

6. I have or have had jobs (paid or volunteer) that required organizing or supervising a number of people.

IF YES: I... ☐ *enjoyed* ☐ *didn't mind* ☐ didn't like the experience

IF NO: I... ☐ *would be willing to try it* ☐ would rather not try it

☐ Check here if your response was one of the italicized ones — then go to “Tally Your Results” and circle #6.

7. I have or have had jobs (paid or volunteer) that required recruiting people to do something.

IF YES: I... ☐ *enjoyed* ☐ *didn't mind* ☐ didn't like the experience

IF NO: I... ☐ *would be willing to try it* ☐ would rather not try it

☐ Check here if your response was one of the italicized ones — then go to “Tally Your Results” and circle #7.

8. I am often in situations where I have to interact with people I don't know very well.

IF YES: I... ☐ *enjoy* ☐ *don't mind* ☐ don't like the experience

IF NO: I... ☐ *would be willing to try it* ☐ would rather not try it

☐ Check here if your response was one of the italicized ones — then go to “Tally Your Results” and circle #8.

9. I do talk or have talked to my friends about causes that I care about and why I care about them, even when I know my friends may not agree with me.

IF YES: I... ☐ *enjoyed* ☐ *didn't mind* ☐ didn't like the experience

IF NO: I... ☐ *would be willing to try it* ☐ would rather not try it

☐ Check here if your response was one of the italicized ones — then go to “Tally Your Results” and circle #9.

10. My work (paid or volunteer) includes writing press releases, marketing and promotional materials, or advertising copy.

IF YES: I... ☐ *enjoy* ☐ *don't mind* ☐ don't like the experience

IF NO: I... ☐ *would be willing to try it* ☐ would rather not try it

☐ Check here if your response was one of the italicized ones — then go to “Tally Your Results” and circle #10.

TALLY YOUR RESULTS:

3 7 9 10: **Direct Asking**
2 4 8 9: **Selling**
1 4 5 6: **Social Gatherings**

The type of fundraising activity you are likely most suited for is the one that has the most numbers circled. You may well be a person who likes or is willing to try more than one of these types of strategies. Many people who are good at selling are good at direct asking; just as often, someone who likes social gatherings will be good at selling. Talk with the leader of your fundraising team about matching your skills and preferences with the group's fundraising plan.

Initial Questionnaire



The Bayer Center is very excited to be working with you to develop new fundraising capabilities. While the process can be daunting at times, it can be learned and through it, we can help realize new possibilities for our communities!

Please help us prepare by providing some background information. If something does not apply, please simply leave it blank.

1. How does your organization currently raise funds? Check all that apply.

- | | |
|---|--------------------------|
| Gifts from individuals in response to appeal letters: | <input type="checkbox"/> |
| Gifts from individuals in response to phone calls: | <input type="checkbox"/> |
| Gifts from individuals asked personally by staff/board: | <input type="checkbox"/> |
| Gifts from individuals in honor/memory of another: | <input type="checkbox"/> |
| Gifts from businesses for operations: | <input type="checkbox"/> |
| Gifts from businesses for projects: | <input type="checkbox"/> |
| Matching gifts from employers: | <input type="checkbox"/> |
| In-kind donations from businesses/individuals: | <input type="checkbox"/> |
| Foundation grants for operations: | <input type="checkbox"/> |
| Foundation grants for special projects: | <input type="checkbox"/> |
| Government funding – local/county level: | <input type="checkbox"/> |
| Government funding – state level: | <input type="checkbox"/> |
| Government funding – federal level: | <input type="checkbox"/> |
| Special Events: | <input type="checkbox"/> |
| Sales of merchandise: | <input type="checkbox"/> |
| Fees for service: | <input type="checkbox"/> |

2. How many board members do you currently have?

What is the attitude of your current board members towards fundraising?

3. Do you have a mailing list of individuals interested in your work?
How do you communicate with them?

4. How do you recognize your donors? Check any that apply:

- | | |
|--|--------------------------|
| Listing names in newsletters/on website: | <input type="checkbox"/> |
| Phone calls/thanking in person: | <input type="checkbox"/> |
| Standard letter: | <input type="checkbox"/> |
| Personal note: | <input type="checkbox"/> |
| Event: | <input type="checkbox"/> |
| With a token gift: | <input type="checkbox"/> |
| Other: | <input type="checkbox"/> |

5. Do you currently have a membership program? If so, what is the cost to be a member for one year? Is there more than one membership level?

Fundraising Planning Worksheet

Note: Complete a separate worksheet for each strategy

1. Classify your strategy

- | | |
|---|---|
| <input type="checkbox"/> Board Giving | <input type="checkbox"/> Major Donors |
| <input type="checkbox"/> New Member/Donor | <input type="checkbox"/> House Parties |
| <input type="checkbox"/> Acquisition | <input type="checkbox"/> Businesses |
| <input type="checkbox"/> Member/Donor Renewal | <input type="checkbox"/> Foundations |
| <input type="checkbox"/> Special Appeals | <input type="checkbox"/> Planned Giving |
| <input type="checkbox"/> Special Events | |

2. Quantify your goal

- ☐ Total dollars raised
- ☐ Number of new members/donors
- ☐ Percentage of renewing members/donors

3. Choose your action steps:

-
-
-

4. Identify who will do the work:

- | | |
|---|--|
| <input type="checkbox"/> Staff (Specify) | <input type="checkbox"/> Committee (Specify) |
| <input type="checkbox"/> Board of Directors | <input type="checkbox"/> Volunteers |

5. Set a deadline for each action step:

-
-
-

6. Determine costs, if any, for each action step:

- ☐ Postage, printing or supplies for mailings
- ☐ Refreshment and entertainment for events
- ☐ Printing t-shirts or other thank you items for donors

Agency Name
Fundraising Plan
Month X, 200X to Month X, 200X

Strategy	Goal	Action Steps	Who	When	Expenses
<i>Board Fundraising</i>	Raise \$2,000, an increase of 20% from last year	1. Proposed ID process & asking	Staff/BD Committee	June - Nov	\$0
		2. Board members make own gifts		by Nov	\$100
<i>New Member Acquisition</i>	250 new members	1. Four mailings to 1,000 prospects each (goal: 50 new members)	Staff	quarterly	\$2,000
	\$12,500 total in member dues	2. Each board member recruits three members (goal: 60 new members)	BD	May - Dec	\$0
		3. Events (goal: 50 new members)	Committee/Staff	May - Dec	see below
		4. General public relations (goal: 20 new members)	Committees/Volunteers/Staff	ongoing	\$0
		5. House parties (goal: 70 new members)	BD	Feb - Dec	see below
<i>Renewals</i>	330 renewals (66%)	1. Four mailings	Staff	quarterly	\$1,000
	\$20,000 income				
<i>Special Appeals</i>	\$5,000	1. Spring Appeal	FRC/Staff/Volunteers	by Feb 1	\$250
		2. Year-End Appeal	FRC/Staff/Volunteers	by Nov 1	\$250
<i>Special Events</i>	\$6,000	1. Auction (\$5,000)	BD/Volunteers	Feb	\$2,500
		2. Dinner-dance (\$1,000)	BD/Volunteers	Sept	\$200
<i>Major Donors</i>	\$50,000	1. Finalize MD plan	Staff/FRC	Jan	\$0
		2. Implement plan	Staff/FRC	Jan - Dec	\$1,000
		3. Plan and host gathering	Staff/BD/FRC	June	\$200
<i>House Parties</i>	\$10,000	1. Finalize dates for 10 gatherings	FRC/BD/Staff	Jan	\$0
		2. Hold gatherings	Hosts/BD	Apr - Oct	\$1,200
		3. Follow-up letters/calls	Hosts/FRC/Staff	each gathering	\$0
<i>Businesses</i>	\$10,000	1. Design and implement plan	Staff/FRC/BD	Feb - Dec	\$0
		2. Mail solicitations (3 mailings)	Staff/FRC/BD	Mar/June/Oct	\$200
		3. Business breakfast	FRC/Staff	May	\$500

Agency Name
Fundraising Plan
Month X, 200X to Month X, 200X

<i>Foundations</i>	\$80,000	1. Evaluate last year's grant program	Staff	Jan	
		2. Prepare this year's strategy	Staff	Jan	
		3. Prepare one more capacity grant proposal	Staff	Mar	\$200
		4. Prepare program grant proposal	Staff	May	\$100
<i>Planned Giving</i>	Future Income	1. PG seminar	Staff	Oct	\$150
		2. Request in every newsletter	Staff	3/yr.	\$0
		3. Open account w/local broker	Staff	by March 1	\$50
		4. Design/print PG brochure	Staff/PGC	by Sept 1	\$3,500
Total Goal: \$213,500			Total Expenses: \$13,400		

Agency Name
Fundraising Plan
Month X, 200X to Month X, 200X

Strategy	Goal	Action Steps	Who	When	Expenses
<i>Board Fundraising</i>					
<i>New Member Acquisition</i>					
<i>Renewals</i>					
<i>Special Appeals</i>					
<i>Special Events</i>					
<i>Major Donors</i>					
<i>House Parties</i>					
<i>Businesses</i>					
<i>Foundations</i>					
<i>Planned Giving</i>					
Total Goal:			Total Expenses:		

Benefits of Partnering for Corporations

Strategy Enrichment

“Builds a virtuous circle”

- Strong corporate social performance resulted in a “virtuous circle,” both benefiting from and contributing to strong financial performance.
- Corporate strategy can be significantly enriched by incorporating meaningful community engagement through collaboration with nonprofits.
- Develops positive and trusted image with customers, potential customers, regulators, community groups, & legislators.
- Moves community involvement from “nice to do” to “need to do” as a core business strategy.

Human Resource Management

Community service programs:

- Help companies attract better employees *
- Build employee motivation and morale⁺
- Build loyalty and retention
- Broaden employees perspectives of people of diverse backgrounds
- Enhance core capabilities such as planning, teamwork, and collaborative leadership
- Illuminate each employee’s capabilities, values & attitudes

* 90% of managers agreed in a Conference Board survey of 434 companies.

⁺ Morale was three times higher in firms heavily involved in their community (out of 188 companies surveyed. 1992)

Business Generation

“Doing good is good business”

- Enhances reputation → builds goodwill → expands networks, relationships and markets → increases access to key consumer groups.
- Provides arena to test innovations or launch new products
- Increased sales through access to new customers

Culture Building

“Community involvement is the central force that shapes and reinforces the core values vital to success”

- Builds caring organizational culture
- Fosters a service-oriented mentality
- Creates cohesion through common values
- Celebrates high-involvement and high-impact leadership by reinforcing active engagement in making a difference
- Serves as organizational glue—especially in crisis
- Serves as a compatibility checkpoint for evaluating potential business partners



Fifty-Three Ways

for Board Members to Raise \$1000

by Kim Klein

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 Buckstretch 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 \times \$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 you 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 \$100 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 $12 \times (12 + 12)$ \$288
 From those dinners $12 \times (12 + 12 + 12 + 12)$ \$576
 From those dinners $12 \times (12 \times 8)$ 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 or 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 or 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.

Samples of Fundraising Commitments by Board Members or Other Volunteers

Sample agreement form to be filled out by volunteers:

I, _____, will help Effective Organization raise \$ _____.

My Gift: \$ _____.

Indicate how payment of this gift is to be made. (i.e. by pledging monthly or quarterly, or one lump sum, etc.)

I will also:

1. _____

Goal: \$ _____.

Staff help needed: _____.

Date of event: _____.

Date to begin planning event: _____.

2. _____

Goal: \$ _____.

Staff help needed: _____.

Date of event: _____.

Date to begin planning event: _____.

I am interested in more training in fundraising. ____ YES ____ NO

You may contact me for other fundraising efforts. ____ YES ____ NO

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.

assessment tool

adapted from audit developed by dallas center for nonprofit management

AGENCY DESCRIPTION

Agency mission: _____

Does this mission reflect who you currently want to be?

☐ Yes ☐ No

If "no", please provide further explanation: _____

What are the highlights of the organization's history?

What are the organization's most significant challenges?

Services offered:

_____	_____
_____	_____
_____	_____

If everything else is changing, what are we not willing to change? What are our core values?

Number of participants/contracts served each year: _____

How has the client base changed over the past three years? _____

What does our organization do well? What makes us most proud?

Where could we improve? What are some things that are impeding our progress on our goals?

Which current projects are the most promising? Why?

What is exciting about the future of our organization? Projects? Community outreach?

COMPETITORS, PARTNERS, AND COMMUNITY LEADERS

Are there other agencies offering the same services in area?

☐ Yes ☐ No

If "yes", please describe similar agencies and services:

What makes your organization unique?

Briefly describe partnerships:

Current Partners:	<i>Is this partnership productive?</i>	<i>What are specific results of the partnership?</i>
1.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
2.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
3.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
4.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
5.	<input type="checkbox"/> Yes <input type="checkbox"/> No	

Potential Partners:

1.
2.
3.
4.
5.

Please describe the following relationships with individuals. Who are your Community Champions (the people in every community who get things done and can help you achieve your goals)? Who are Strong Volunteer Leaders (people you would like to attract to your board or committees):

Community Champions:	Strong Volunteer Leaders:
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.

BOARD OF DIRECTORS

How many board members do you have? _____

Is this the right size to accomplish its work?

☐ Yes ☐ No

If "no", please provide further explanation: _____

How are board members identified, recruited and oriented?

Are there board subcommittees? ☐ Yes ☐ No

Is there a development/fundraising committee? ☐ Yes ☐ No

Do the committees function effectively? ☐ Yes ☐ No

If "no", please provide further explanation: _____

What does the board understand its role to be?

How active have individual members been in fundraising?

Does 100% of the board annually contribute? ☐ Yes ☐ No

If "no", what percentage of the board contributes: _____

STAFF

How many people are employed by the organization? _____ full-time _____ part-time

Is there a director of development? ☐ Yes ☐ No

- Is there a development staff? ☐ Yes ☐ No
- If there is no dedicated development staff, which staff members are responsible for fundraising? _____

	Tenure with organization	Professional Strengths	Professional Weaknesses
Executive Director			
Development Director			

What does the organization see as critical staffing issues over the next three years?

Does your organization have a succession plan developed for key staff changes? ☐ Yes ☐ No

Does the organization have adequate space in which to do its work? ☐ Yes ☐ No

How does the organization utilize volunteers?

ANNUAL BUDGET

What is the annual operating budget? \$_____

	% of annual budget	Dollar amount	Other
Fees for services	____%	\$_____	Which services?
Government grants	____%	\$_____	Which government entities:
Foundations	____%	\$_____	Which foundations:
Corporations	____%	\$_____	Which corporations:
Individuals	____%	\$_____	# of individuals:

Does the agency expect a dramatic loss in any of the above categories? ☐ Yes ☐ No

If "yes", please provide further explanation:

Does the organization generally have enough cash on hand to meet operating needs? ☐ Yes ☐ No

Does the organization have a relationship with a bank or other outside source of cash to allow necessary borrowing? ☐ Yes ☐ No

FUNDRAISING EFFORTS

Does the agency have a written long-range or strategic plan? ☐ Yes ☐ No

If yes, when was it developed? _____

If yes, did both board and staff participate in the development of the plan? ☐ Yes ☐ No

Is there a 3-5 year fundraising plan? ☐ Yes ☐ No

Are there fundraising guidelines? ☐ Yes ☐ No

Does your organization have:

A database	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, how many individual donors are in your database? _____
Annual campaign	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, when does it take place? _____
Special events	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, when do they occur? _____ _____
Direct mail campaign	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, when does it take place? _____
Membership campaign	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, what is the retention rate? _____

Who determines:

fundraising goals? _____

fundraising activities? _____

fundraising prospects? _____

How do you articulate your agency's success?

What additional fundraising efforts are you considering?

Who specifically is going to do it? Any new people involved?

How are you going to pay for the associated costs?

What is your net revenue goal for each planned activity?
