

## FUNDRAISING: A Team Effort

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ACQUISITIONS

## Preface

This fundraising guide was developed by EMT Group, Inc., (Evaluation, Management, and Training) under contract to the California Department of Alcohol and Drug Programs (DADP). Since 1981, EMT has provided technical assistance and training to alcohol service providers throughout California to develop volunteer programs, to build more effective Boards of Directors, and to better utilize both volunteers and Board members in resource development. This manual is a summary of the training EMT provides on fundraising for nonprofit organizations.

While fundraising workshops are generally tailored to meet the specific situation, organizational size, and history, the content of this manual represents the basic essentials, a core from which a training workshop expands and contracts according to need. EMT staff continue to learn from the growing body of literature on fundraising, from a diverse collective personal experience in fundraising, and from each and every workshop we conduct.

Somewhat ironically, we are beginning to find the requests for fundraising workshops are often followed by requests for volunteer program development, the workshop EMT began providing eight years ago and out of which we developed a fundraising workshop. It takes volunteers to raise program resources. Volunteers are more than your Fundraising Committee, or special events organizers. They are an essential component of your organization's public relations program.

This manual is the product of EMT staff research and experience over the past year. It is an overview that addresses many of the concerns we have heard in the course of our field work with alcohol service providers. In addition, this manual dovetails with at least two other EMT manuals, *Getting Started: Establishing a Volunteer Program in Your Agency* and *Building Better Boards for Alcohol Service Organizations*. Fundraising efforts are only enhanced by effective boards and solid volunteer management.

Finally, remember the "fun" in fundraising. This is the opportunity to realize teamwork at its best, worst, and most exciting. Fundraising is hard work, and the rewards far exceed simple proceeds from your last event. Fundraising is fun!

## ***Acknowledgements***

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## FUNDRAISING: A TEAM EFFORT

Almost every nonprofit organization needs to raise money. New organizations largely supported by grants may seek to supplement their income through independent sources. Established organizations may seek to lessen their dependence on current funding sources. Whatever the reason, most nonprofit organizations become involved in fundraising. All soon learn that fundraising is hard work. But fundraising need not and should not be based on the effort of a few individuals. Fundraising is everybody's business.

### WHO SHOULD BE INVOLVED IN FUNDRAISING?

Too often fundraising is left to the Executive Director or a staff member. Fundraising is not one person's responsibility. To be successful, fundraising must be a "team effort". All paid staff, all Board members, and all volunteers need to participate in the organization's fundraising effort. This is not to say that everyone must be intimately involved in all fundraising efforts. However, everyone has a role to play in raising funds for their organization.

- *The Board of Directors.* The fundraising commitment must begin with the Board of Directors. All Board members must be willing to give money. A Board member's donation does not have to be substantial. It is not the dollar amount that is important; rather, it is the Board's 100 percent participation in fundraising that is essential. Each Board member can assist by asking for contributions from friends, groups to which they belong, and from their work places.
- *Paid Staff.* Paid staff can be responsible for organizing fundraising efforts, preparing fundraising materials, and doing the bookkeeping. However, Board members and volunteers are more appropriate for any "one-on-one" fundraising. As volunteers, they provide immediate credibility to the fundraising effort by demonstrating the community support the organization already has.
- *Volunteers.* Volunteers help direct the organization by being on the Board of Directors and assist in the provision of services by volunteering as "unpaid" staff. Most importantly, volunteers provide the human resources needed to accomplish most fundraising efforts. In an average year, about 45 million public-spirited Americans, or nearly one in five, give service to charitable organizations. Much of that service centers on fundraising.<sup>1</sup> Volunteers are involved in all levels of fundraising (e.g., organizing/directing fundraising efforts, asking for donations, record keeping, and evaluating the fundraising effort). In fundraising, the best person to be involved in seeking contributions in person is the volunteer.

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Fundraising is more than asking for money; it is also developing the climate in which people will want to give to your organization. People give to an organization which they perceive as a provider of a necessary service competently operated and successful. Board, staff, and volunteers can help to develop this climate by doing their particular jobs well and by communicating their belief in the organization's mission. Everyone has an obligation to help the organization to put its best foot forward, to build its image, to improve its services, and to enhance the quality of service.

*In an average year, about 45 million public-spirited Americans ... give service to charitable organizations. Much of that service centers on fundraising.*

## WHERE DO YOU SEEK FUNDS?

A key to successful fundraising is diversity. An organization should have as many sources as possible, with no more than 30 percent from any one source (i.e., one member, one grant).<sup>2</sup>

The following is a list of diverse funding sources:

- Members (\$5-\$35)
- Major gifts
- Pledges (monthly or quarterly)
- Alumni
- Fees for service
- Special events
- Products for sale
- United Way
- Foundation grants
- Corporations
- Vendors, business relationships (e.g., landlord, office supply)
- Civic organizations
- In-kind
- Other

One of the best sources of fundraising is people who either need your services, or who already give time and money to your organization.<sup>3</sup> This would include members, alumni, and clients. The most popular ways to get money from people who need your organization are to charge a fee for service or to establish membership dues (i.e., alumni group).

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The second major source of dependable money is from the people who believe in the purpose of your organization.<sup>4</sup> Although most organizations have a limited number of people who need services, you can "sell the value" of the organization to a much larger group of people. You need to design a strategy that will describe how your organization is of assistance to the community, or how it benefits a particular segment of the community. With precise information about your organization's benefits, you can contact for-profit corporations, businesses, and civic organizations in your area. You can use direct mail fundraising, remembering that the more limited the purpose of your organization, the more restricted your mailing should be. Major donors become another possibility when you focus on who may believe in your organization rather than who needs your organization.

Another source of "believers" are foundations and government agencies who make grant funding available to your organization. Grants, however, are short-term and not usually renewable. It may be a better investment of your time and energy to concentrate on the sources of funding that can be more reliable from year to year.

After you establish a dependable system to raise money from the people who *need* your organization and people who *want* your organization, you can consider ways to solicit funding support from everyone else.<sup>5</sup> To reach the broadest audiences, you may want to consider activities such as bingo, selling products, or sponsoring a special annual event. Special events allow your members and volunteers an opportunity to ask other people for money for something which will be received in return, rather than to always focus on a direct request for straight donations. Special events offer the opportunity to raise money, as well as an opportunity to promote and publicize your agency.

## DEVELOPING YOUR FUNDRAISING PLAN

When developing your fundraising plan, keep in mind that your best source of funds is from individuals (See Table 1<sup>6</sup>). The 1982 figures on philanthropy indicate that 80 percent of all charitable contributions came from individuals. In 1985, total giving hit \$66 billion and over 80 percent came from individuals.

<u>Contributions</u>	<u>(in billions)</u>	<u>% of Total</u>
Individuals	\$48.92	81%
Bequests	5.43	9%
Corporations	3.02	5%
Foundations	3.02	5%



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In developing your fundraising plan, you will do well to consider the following simple steps:

- ***Assess your needs.*** Review how funds are obtained and amounts from current and previous years. This will provide an overview of your organization's fundraising success.
  - Decide which fundraising approaches have been most successful.
  - Consider current fundraising approaches that could be enhanced or new fundraising sources which appear favorable for your organization.
  - Determine the sources you want to target for your approach.
- ***Set your goals.*** Without considering your total budget, set income goals for each of your funding sources. If you have never used the particular source before, do not rely too heavily on it at first. If you have an idea of the amount of income to expect, write out a *worst* outcome (i.e., same as last year), a *best* outcome, and then come to a middle or *likely* income goal.
- ***Plan your strategy.*** There is considerable preparation needed to accomplish any fundraising strategy. To be sure every task is achieved, identify all steps needed to carry out your full fundraising strategy. Part of the plan is to determine who is responsible for completing each step or task. Furthermore, training is an especially important task for staff and volunteers who may be soliciting funds. Everyone will need to be knowledgeable about the organization.
- ***Develop a one-year fundraising calendar.*** To assure that the timing of all your fundraising activities is reasonable and that dates for events are compatible with each other every fiscal year. Develop a complete calendar of all activities related to accomplishing your fundraising efforts. Be sure to space fundraising projects so staff (paid and unpaid) do not experience "burn out".
- ***Implement your plan.*** Include check points throughout the implementation period to check your progress. A "telephone tree" for support calls will facilitate progress and minimize breakdown or outright project failure.
- ***Evaluate.*** Keep accurate records to determine if fundraising projects were cost effective, whether prospect lists were targeted correctly, and whether the projects were appropriate to the organization. Be sure to ask everyone involved (staff and volunteers, alike) how they felt about the fundraising project. Everyone who was involved deserves feedback on the outcome of the project proceeds, at a minimum. That is part of the reward of volunteering to help with fundraising.

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- *Provide for recognition and awards.* Everyone involved in fundraising efforts likes to be thanked for their efforts.

In developing your plan, there are no right answers, no secret formulas, no magic. As Joan Flanagan states, "It [fundraising] is not easy. But it is simple. Ask for money."<sup>7</sup>

## ASKING FOR MONEY

Usually, the hardest way for an organization to raise money is for anyone -- Board, staff, or volunteers -- to ask people directly for donations. Your best source of funds, however, is from individuals. Part of your fundraising strategy should include training to help people reduce their fears of asking for donations and suggestions for approaches to use whenever asking for money.

Everyone is apprehensive about asking for money. Whether in the form of selling tickets for a special event, selling a product, or asking for contributions, we all experience a rise in our anxiety level to some extent when asking for financial support. As the *Grassroots Fundraising Book* points out,

*Asking a person for money face-to-face is an acquired taste. Few people love to do it initially; in fact most people are afraid to do it. If you're afraid to ask for money, that's normal. If you are not afraid, that's great . . . stop reading this article and go ask somebody for a donation.*<sup>8</sup>

Most people are apprehensive about asking for money either because they anticipate rejection and failure, have a concern about losing face, or are simply embarrassed when bringing up the subject of money. In *The Grassroots Fundraising Book*, Joan Flanagan places these fears in perspective:

*It is not a chore; it is a challenge. Asking for money is like going out to beat up a bear. The larger the amount, the more frightening it becomes because you have to beat up a bigger bear.*<sup>9</sup>

Asking for money is difficult, but through training, experience, ongoing support, and encouragement, apprehensions about asking for money can be lessened. An organization which offers training, experience and support for the Board, staff, and volunteers will benefit from building an ever-widening base of people from which to seek funds.

*It (asking for money) is not a chore; it is a challenge.*

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## Training -- Confidence Building Exercises

The first step is to teach staff, volunteers, and Board members how to conquer their fear associated with asking people for money. You can accomplish this in a group setting through a number of exercises which can start to dispel fears about asking for money. Fundraising consultant and trainer, Kimberly Klein, describes the following exercises in a videotape entitled, "How to Formulate Your Case".

These exercises can help Board, staff, and volunteers better understand their fears about asking for money and what motivates people to give money. These exercises are much more effective when used within a group rather than on an individual basis. Within a group, individuals can share information, encouragement, and support. A member of the group can act as "facilitator," or you can ask someone outside the group to facilitate.

### *Exercise 1*

The first exercise helps the group verbalize their fears. To begin the exercise, each person imagines asking someone for a large amount of money (anything over \$50). Take a few minutes for each person to write down what he/she fears will happen. One by one, each person then shares these fears aloud. All of these fears will be written on a blackboard or a sheet of butcher paper. A sample of possible responses follows:

- Person will say no -- rejected.
- You will get less than you want.
- Person thinks less of you.
- Person will get mad at you.
- Person will give "song and dance" -- lie to you.
- It will be imposing on our friendship for me to ask.
- Person will ask me questions about the organization that I cannot answer.

After the brainstorming session, the group should sort the fears listed into three categories:

1. Things that will happen.
2. Things that could happen, but are unlikely.
3. Things, if they did happen, that are not your problem.

Examine those in the first category, "Things that will happen". From the example, the first two fears listed fit this category. These include getting a "no" response or getting less than you want. Although both situations occur in reality, do not take either of these responses as a personal rejection. If possible, take this as an opportunity to learn more about the person's reasons for saying no, about their priorities for donating. The next fear, "receiving

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less than you wanted", is still an indication of support for your organization. It is a successful beginning. Also, the first category of fears includes asking you questions about the organization which you cannot answer, even though you came well-prepared. Do not hesitate to say "I don't know, but I will find out and let you know". This is not a failing on your part.

The second category of fears, "Things that could happen, but are unlikely," would include the concern that the person will then ask you for money for his/her special cause. You can make your own decision at the time; however, there is no need for a "quid pro quo" feeling. Reciprocity is not a "given" in fundraising, although it does foster additional good will.

Other fears such as the person will get mad at you or will lie to you fall into the third category of "things that are not your problem." You do not have any control over these responses.

Take this opportunity to look at your fears and ask:

- Is it likely?
- Is it my fault?
- Is it the end of the world?

You can work on those areas where you feel you need improvement. Think of asking for money as a challenge, not a chore. It is an opportunity to learn and to grow. Do not hesitate to ask for assistance and support.

## *Exercise 2*

The first exercise was an examination of individual fears. The second exercise allows us to assess the reasons people say "yes" to a request for money.

First, think about why you give money to any organization. Your reasons for giving and not giving will be much the same as anyone else's and will help you understand what motivates people to give. In this exercise, participants imagine that an acquaintance has come to them, explained a cause that he/she is supporting, and asked for a donation. Imagine that the request is reasonable, but not an amount you could give to everyone who asked. For most people, this amount is between \$20 and \$50.

For thirty seconds participants write down on a sheet of paper all the reasons they would say "yes" to this request. Then for the next thirty seconds they list all the reasons they would say "no". Ask the participants to share their results and record their responses on the blackboard or two sheets of butcher paper. The following are some of the most common responses:

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**"Yes" responses because:**

- You believe in the cause.
- You just got paid.
- You like the person asking for my money.
- You know the money will be used well.
- You like the approach.

**"No" responses because:**

- You do not believe in the cause.
- You do not have the money.
- You are in a bad mood that day.
- Organization has a bad reputation.
- You do not know what my money will be used for.

The group can discuss the two lists. The "no" list responses typically fall into two categories: (a) reasons which are not the asker's fault and which could not be anticipated in advance, and (b) reasons which appear to be "no" but are really "maybe". These two exercises and the ensuing discussion will help the group members understand that asking for money may not be as negative an experience as they might have thought. Even though the person may say "no", usually they say "no" for reasons outside your control or knowledge. The "yes" responses affirm what you know about human nature. People give when they agree with the cause, like the requester's approach, or are otherwise feeling positive. You may learn some new insights from your colleagues to help you realize all the motivations for giving.

The purpose of these exercises is to make the fears associated with fundraising more manageable by understanding the universality of personal fears and to think about what makes it possible to get a positive response to a request for money. The first exercise helps each individual to verbalize fears and take the opportunity to look at how real these fears may be. The second exercise allows the group to examine and assess the reasons people say "yes" to a request for money.

Once the Board, staff, and volunteers have had the opportunity to explore and understand their fears about asking for money, they are ready to review and discuss the following process for approaching an individual for a donation.

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## Steps To Asking For A Donation

Asking for money from an individual in person is targeting one of your best possible sources of funds and using what many feel is the most difficult means of fundraising. The following steps will help you to be better prepared for any face-to-face meeting:

1. *Commit Yourself to the Cause of the Organization.* Before you can sell the organization to someone else, you must believe in the cause, feel the organization deserves community support, and demonstrate your commitment with a financial contribution.
2. *Educate Yourself About the Organization:* Prepare yourself to provide accurate and complete information about the organization's history, purpose, and specific services. Take time to write down a description of your agency in three or four paragraphs. Collect pamphlets or other material which may be appropriate to distribute at any meeting with potential donors. Be sure to work with the Executive Director to determine the best feature of the organization and what material should be distributed.

<p><i>Commit yourself to the cause of the organization.</i></p>
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3. *Conduct a Dry Run of the Face-to-Face Meeting.* Role play your face-to-face meeting with potential donors either alone or with someone else. Think of tough questions to anticipate and how you would respond. Think about how you want to present the information about your organization, particularly in terms of how it benefits the community. Speak to the interests and needs of the potential donors. People give money because it serves them to do so. Speak to them in their language. If they are profit motivated, tell them why the organization is a good investment. If possible, provide a description of the program budget. You need not be specific, but present some idea of what their money will buy. For example, "your \$50 donation will supply alcohol prevention information to a group of 1,000 individuals."
4. *Establish a "Mood of Yes".* For example, you might ask: " Would you like to win a car?" " Do you think abused children need a place for help?" " You can participate by donating \$25 toward our goal." Imagine the person nodding in agreement. Do not talk too much. Then prepare a trial close, such as " Well, it seems like you understand our organization's needs and purpose. Could we talk about your participation?" " If the requested donation is too high, what would you like to donate?" " I have a return envelope." " I can take a check."

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5. *Research the Potential Corporate Donor.* Before you contact the potential donor, do some research about the donor and his or her company, if applicable. Learn what organizations the person donates to currently and when they donate. If you learn about any of the donor's special interests, you may want to take someone with you to the interview who shares these interests.
  6. *Arrange for the Interview.* There are several ways to arrange for a face-to-face interview with a potential donor. You can send a letter telling the individual about your agency or special program and indicate that you will follow up with a telephone call. You can telephone the individual or you can ask a mutual friend or associate to arrange an interview for you. Be prepared to meet with the potential donor at his/her convenience. Remember the importance of being on time for the interview.
  7. *Go as a Team of Two.* If possible, send two people together to meet a donor. Good combinations are a member of the staff and a volunteer or Board member. The staff person can assist with the factual questions about the organization, and the Board member or volunteer lends credibility to the request for a donation by demonstrating the organization's community support. Another combination would be one person who has experience and is more comfortable with the process of asking for money than the other person. Or, one of the people may have a certain expertise or interest which is shared by the potential donor. Whatever the reason for pairing people as a team, two people can provide moral support to each other and share both the excitement of getting the donation, as well as the disappointment of the occasional turn-down.
  8. *Follow up.* Immediately after your meeting, follow up with a thank you letter to confirm the amount and how the payment will be made.

*Fundraising is a method of confidence building, shared knowledge, experience and support.*

Whenever you are part of a fundraising effort, get everyone involved together as a group to discuss the work, share the successes, and provide support for the difficult cases. Make it fun and help build excitement for supporting everyone's efforts. Start small with potential successes, and build on these small positive experiences. Fundraising is a matter of confidence building, shared knowledge, experiences and support.

Remember that asking for money can feel like going out to beat up a bear. You do not want your staff, Board members, or volunteers to return from fundraising efforts always feeling like they got beat up by the bear. Start with a small, friendly bear (like selling a few tickets) and build on positive experience before going after the bigger bear.

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## THE ROLE OF VOLUNTEERS

To launch a fundraising effort, organizations require the support and involvement of volunteers. Volunteers provide the life blood of fundraising campaigns for nonprofit organizations. The volunteers' involvement in fundraising provide human resources far in excess of a nonprofit organization's ability to pay. Volunteers can bring specialized skills to fundraising and additional contacts within the community. In addition, volunteers demonstrate direct community support for the organization, a vital element of fundraising activities.

The following speaks to the various roles volunteers can play in fundraising, where to find volunteers for fundraising, and what can be done to support volunteer involvement. The volunteer can assume an active role in fundraising in at least three major capacities:

- As a member of the Board of Directors;
- As a member of a Fundraising Committee; and/or
- As a short-term volunteer.

## FUNDRAISING BY MEMBERS OF THE BOARD OF DIRECTORS

As the most visible and powerful volunteer group, the organization's Board of Directors can be the first to demonstrate commitment to, and involvement in, fundraising activities. By definition, the Board of Directors is actively involved in determining the budget, deciding upon allocations, and identifying funding sources. The Board of Directors can also be a major organizing force for fundraising campaigns. However, all too frequently, unless members of the Board of Directors were recruited for the primary purpose of bringing funds into the organization, individually they are reluctant to accept this active role in fundraising. This reluctance is understandable. Fundraising is a new and a difficult activity for most Board members.

Frequently, there is confusion within nonprofit organizations over the precise and respective fundraising roles for the Board of Directors and the Executive Director. In fact, much of the literature on nonprofit Boards addresses fundraising as a "negotiated" area of responsibility for the Executive Director and the Board of Directors to define and usually share. Whether through deliberate negotiation or by default, the Board of Directors' fundraising role can be either one of active participation or simply review and approval. Use Exercise 1 "Board and Staff . . . Who does what?" on the following page to assess the role your Board assumes in fundraising activities.



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## EXERCISE 1

### Board and Staff Roles . . . Who Does What?

Indicate with a number 1 who has the primary role in your organization for each activity. If it is a shared responsibility, use the number 1 for both the Board and the Executive Director. Use a number 2 to indicate secondary responsibility.

<i>Activity</i>	<i>Board</i>	<i>Staff</i>
Identifies program needs	_____	_____
Determines budget allocations	_____	_____
Identifies funding sources	_____	_____
Develops fundraising plan	_____	_____
Solicits funds and other resources	_____	_____
Prepares grant/foundation applications	_____	_____
Organizes special events	_____	_____

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The most effective fundraising usually occurs when fundraising is regarded as a responsibility shared by the Board of Directors and the Executive Director. The Board is involved in the early stages of the fundraising effort, reviewing the idea for approval, and developing an action plan in conjunction with the Executive Director.

If the full Board is reluctant to accept an active group role in fundraising and there is no immediate need for intensive fundraising, the Executive Director and supportive Board members can launch an education campaign to stress the fundraising role of the Board or, alternately, choose to involve the full Board at a later time. If fundraising is a critical organizational need and the Board resists collective support and involvement, membership may be reexamined to search for replacements, recruiting for active fundraising members.

*As the most visible and powerful volunteer group, the organization's Board of Directors can be the first to demonstrate commitment to, and involvement in, fundraising activities.*

## Targeted Recruitment

Active fundraising support from the Board needs to begin with the recruitment of the Board. When recruiting Board members, candidates who meet the specific needs of the organization should be targeted. For fundraising purposes, it is important to have a Board that reflects the composition of the community by giving careful consideration to the age, gender, and ethnicity of potential Board members. Also, consider whether the Board has the necessary skills to support successful fundraising efforts. Recruitment can be targeted to community background, individual skills, personal contacts, hobbies, and professional affiliations which would serve the interests of the Board. For the purposes of fundraising, members of the Board must be recruited from among prominent community representatives (e.g., doctors, bankers, corporate leaders, leaders of service clubs, and the clergy).

Review your current Board to determine how well it represents the community it serves. Do you need more involvement from young people or from the elderly? Do you need to involve representation from specific ethnic minority groups? See Exercise 2 "Board Composition" on the following page. This exercise can assist you in reviewing your Board profile. In terms of background, skills, experience, and personal contacts, a diverse and well-rounded Board will enhance your fundraising efforts. Once the Board has targeted the desired backgrounds and expertise, prospective Board members may be found among friends and acquaintances of current and past Board members, staff members, donors, and clients. Your local Volunteer Center or United Way may also be a resource, especially if there is a formal Board Bank.

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## EXERCISE 2

### Board Composition

**Directions:** First, determine the composition of your community in terms of distribution according to gender, age, and race or ethnicity. Enter this information under "Community". Then in the next column, indicate the distribution of your Board members on the basis of necessary skills, expertise, and affiliations. Add any skills you feel are expedient for your organization (e.g., recordkeeping, educator, therapist). Then enter how your current Board members reflect the skills, experience, and affiliation needed. In the last column "Target Recruitment", check off areas you need to target for recruitment in order to round out the Board.

	<u>Community</u>	<u>Current Board</u>	<u>Target Recruitment</u>
<u>Gender</u>			
Male	_____	_____	_____
Female	_____	_____	_____
<u>Age</u>			
Under 20	_____	_____	_____
20 - 29	_____	_____	_____
30 - 39	_____	_____	_____
40 - 59	_____	_____	_____
60 - 69	_____	_____	_____
Over 70	_____	_____	_____
<u>Race/Ethnicity</u>			
Caucasian	_____	_____	_____
Black	_____	_____	_____
Asian	_____	_____	_____
Native American	_____	_____	_____

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## EXERCISE 2

(continued)

### Necessary Skills/Interests

Legal	_____	_____	_____
Finance	_____	_____	_____
Fundraising	_____	_____	_____
Planning	_____	_____	_____
Public Relations	_____	_____	_____
Personnel	_____	_____	_____

### Affiliations

Industry	_____	_____	_____
Business	_____	_____	_____
Banker	_____	_____	_____
Doctor/Other Professional	_____	_____	_____
Insurance	_____	_____	_____
Civic Clubs	_____	_____	_____
Real Estate	_____	_____	_____
Labor	_____	_____	_____

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## Support of Board Involvement

The Board of Directors' involvement in fundraising can be supported by the following:

- *A policy statement.* The Board can officially state what its role is relative to fundraising in a written policy statement (i.e., the Board's bylaws).
- *Job descriptions.* In written job descriptions for Board members, describe the responsibility of each Board member to donate or solicit funds.
- *Targeted recruitment.* Actively recruit Board members based on background, skills, resources, and affiliations to support fundraising efforts.
- *Individual Board member goal-setting.* Prior to each fundraising activity (e.g., corporate solicitations, individual solicitations, special events), ask each Board member to determine their individual fundraising goal for this activity. This can be done formally or informally. For example, the Board Fundraising Committee may be keeping individual records on Board members' donations (direct, in-kind, and donations obtained from others). The Board member's individual goal could be noted on this record. There is no need to make this a contest; but viewed as a "game", declared goals may systematically activate 100 percent participation from all Board members.
- *Fundraising Committee.* The Board can strengthen and direct fundraising efforts by delegating fundraising to a committee comprised of members, as well as volunteers from the community at large.
- *Training and Education.* Fundraising efforts can be enhanced by ongoing training and education about the fundraising process and fundraising techniques. This training can rely on resources within the organization, based on shared experiences, or by inviting outside sources of expertise. Remember to check your local Volunteer Center for possible fundraising workshops.
- *Recognition.* Recognize Board members' efforts in fundraising as often and in as many ways as possible. Recognition can be a formal year-end ceremony which recognizes the individual Board member who brought in or contributed the most resources (in-kind donations can be added in at 10 percent of their stated value much as they would sell at a rummage sale). Individual Board members, and hopefully the entire Board can be recognized for "being 100 percent" – that is, for having provided support and been involved in all fundraising activities. The means to earn this award should be specifically outlined at the beginning of the year. Recognition can also be as informal as a verbal "thank you", a personal note, or a certificate of appreciation.

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- *Executive Director and Board President support.* One of the most important ways to demonstrate support for full Board involvement in fundraising is through the active support, direction, and assistance from the Executive Director and the Board President working cooperatively. Together these two leaders pose a formidable team and an example of good organizational support. Fundraising works only to the extent the Board and Executive Director are committed and involved in the activity.

While there are no "money back guarantees", if you follow all of the suggestions for building, developing, and supporting the Board's efforts in fundraising, your efforts will likely be rewarding. These suggestions are guides to capitalizing on resources you have available in your Board members.

*... declared (fundraising) goals may systematically activate 100 percent participation from all Board members.*

## DESIGNATING A FUNDRAISING COMMITTEE

Fundraising volunteers do not need to be Board members. Volunteers may be involved in fundraising by participating on a Fundraising Committee and working as long- or short-term volunteers. The Fundraising Committee typically includes several Board members, but other community volunteers should be recruited to provide the skills and human resources necessary to accomplish the tasks of the committee. Like the Board, the Fundraising Committee must set an example of commitment and involvement. The primary responsibilities of this committee include:

- *Developing a fundraising plan.* When identifying types of fundraising efforts under consideration, consult with other agencies and other persons involved with fundraising. For new groups, it is often best to plan several small events. Establish a realistic goal for the first year based on sources of funds and possible volunteer recruits. Then, refer the fundraising plan to the Board for review and approval. It is a good idea to plan annually, identifying funding needs, scheduling projects, and setting event targets.
  - *Recruitment.* Similar to the Board, the Fundraising Committee needs to target those skills and resources needed for its membership. Board members should be identified and recruited first, followed by other community volunteers.
  - *Setting a calendar.* Develop a calendar for recruitment, training, campaigning, reporting, and recognition and distribute the calendar to the Board.
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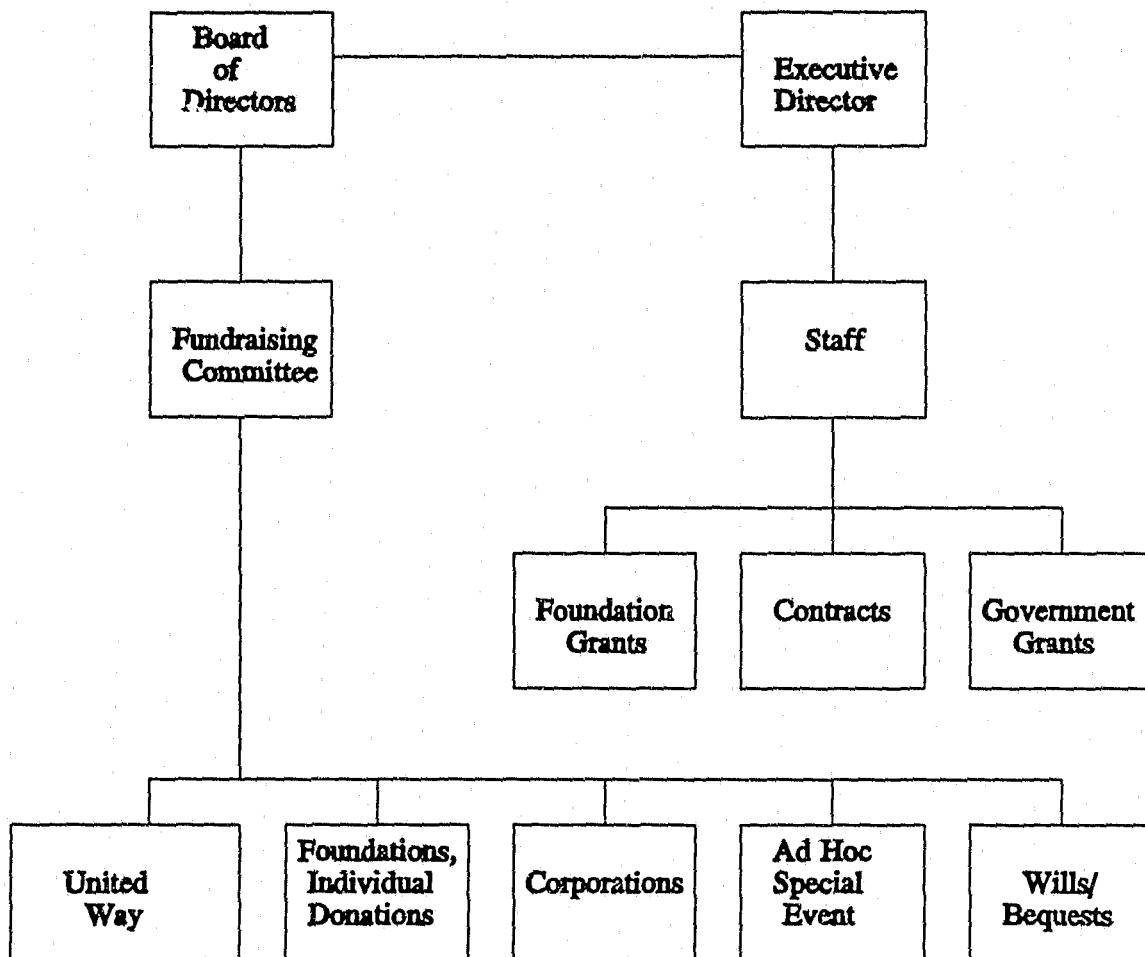
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- ***Committee budget.*** Develop a budget for fundraising activities and present it to the Board.
  - ***Meetings.*** Hold regularly scheduled meetings to delegate responsibilities, update members on fundraising activities, and provide mutual support for one another's efforts.
  - ***Record keeping and reports.*** Smart fundraisers always keep complete records of their activities, donor information, and reports on the process and results of each fundraising activity.
  - ***Recognition.*** Recognition of committee members can take place either formally, with the entire Committee or Board present, or informally. Always remember to say "thank you" in some way.

For the most part, the support and encouragement of volunteer involvement in Fundraising Committee activities is based on having clear, well-defined job assignments and a clear job description for the members of the Fundraising Committee, as well as any subcommittees. Depending upon the kind of fundraising you propose to undertake, you may also develop a subcommittee structure to deal with the obvious organization needs. For example, your organization's fundraising structure may be as shown in Figure 1.

This type of structure divides the work into manageable pieces and includes many individuals in the fundraising experience.

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**FIGURE 1**  
**Organizational Structure**  
**For Fundraising**





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The Fundraising Committee and each subcommittee should mirror Board structure by having a member job description, a chairperson, regularly scheduled meetings with an agenda, and recorded minutes. The rule is to incorporate planning, delegation, and communication into your fundraising effort.

## Committee Recruitment and Support

Beginning with a core group of Board members and interested volunteers, look for personnel resources beyond this core group of people to learn of their other involvements and to expand via networking. Especially if there are active subcommittees, each chairperson will be highly motivated to involve other volunteers so tasks can be distributed more broadly. The Executive Director and staff may also know of potential volunteers. As you recruit for members of the Board of Directors, you target the background, skills, and affiliations needed among your volunteers. In a chairperson, look for the abilities to lead and to work with people and a sincere interest in goal setting and follow through. For members, look for energy, "sales" ability, and conviction to the organization's purpose.

Staff may provide support to fundraising efforts in the form of clerical assistance, education and training, or as active committee members. Show unilateral support by allowing everyone opportunity for involvement in the decision-making process, continued communication of what is happening, and always, always recognize each individual's efforts. The thank you note is the most important fundraising tool. Give the "stars" public recognition, and give everyone a thank you note.

*The thank you note is the most important fundraising tool.*

## RECRUITING SHORT-TERM VOLUNTEERS FOR FUNDRAISING ACTIVITIES

Not all fundraising volunteers need to be on the Board of Directors or attend fundraising committee meetings. Many fundraising efforts are supported by those volunteers who provide specific work for a specified time period with no need to attend meetings. Special events often need short-term volunteers at all stages of planning and implementation. Short-term volunteers can provide clerical support, solicit raffle gifts/door prizes, sell tickets, and work at the event. The ability to include as many short-term volunteers as you might need depends in large part on the level of organization and planning demonstrated by the Fundraising Committee and its subcommittees. It is relatively easy to involve volunteers who might want to assist, but who are unwilling or unable to attend meetings, if you have planned and determined those points when short-term volunteers are needed. Thus, develop a plan

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to gather names of short-term recruits and identify their specific areas of interest. Match the volunteer to the need.

## **Volunteer Recruitment and Support**

Short-term volunteers can be recruited from current Board members, past Board members, clients, alumni, friends, and family. The only need is to get the word out, be clear on commitments and tasks, and keep a complete set of records of what people are willing to do. All fundraising volunteers need clearly delineated tasks, encouragement, and recognition of their efforts. Above all, fundraising volunteers should have fun and, hopefully, experience success with their efforts! Your success can be measured by the following:

- the amount of money raised;
- volunteer enjoyment of the experience;
- the level of participation in the planning process;
- meetings which were short and purposeful;
- tasks that were clear;
- volunteers who were able to choose their tasks;
- work which was not isolated -- work groups were organized;
- shared credit; and
- special privileges which were provided for volunteers.

In the public spirit of fundraising, fun and humor abound amidst the hard work. Fundraising provides the means of accomplishing the mission of the organization. The goal of fundraising is to make the most money with the least amount of volunteer and staff time. Fundraising should be approached with a crusading spirit in support of the organization's cause, and not as an end in itself. Take time to plan, work hard, and enjoy one another's efforts in your goal of supporting a worthwhile organization.

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## References

1. Paul H. Schneider and Donald T. Nelson, *The Thirteen Most Common Fund-Raising Mistakes and How to Avoid Them* (Washington, D.C.: Taft Corporation, 1982), p. 54.
2. Kimberly Klein, *Planning for Fundraising: Basic Principles and Role of the Board*, (videotape, 1987).
3. Joan Flanagan, *The Grassroots Fundraising Book* (Chicago: Contemporary Book, 1982), p. 47.
4. Flanagan, op. cit., p. 73.
5. Flanagan, op. cit., p. 117.
6. Flanagan, op. cit., p. xi.
7. Klein.
8. Flanagan, op. cit., p. xi.
9. Flanagan, p. 23.

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## *Fundraising Resources*

### PUBLICATIONS

The following is a selected list of materials which would be helpful fundraising.

*The Complete Fundraising Catalogue* available three times a year, free, from:  
Public Services Materials Center, 111 N. Central Avenue, Hartsdale, New York 10530.

Flanagan, Joan. *Grassroots Fundraising Book: How To Raise Money in Your Community*. 1982, 300 pages, \$11.95. Contemporary Books, 180 N. Michigan Avenue, Chicago, Illinois 60601.

\_\_\_\_\_, *Handbook on Fundraising*. National Council on Alcoholism, 1983.

Honig, Lisa and Kim Klein, publishers and editors. *Grassroots Fundraising Journal*. Bimonthly periodical, \$20 per year. Grassroots Fundraising Journal, 517 Union Avenue, Suite 20, Knoxville, Tennessee 27901.

Rauner, Judy and Andy Trost. *Gaining Momentum for Board Action*. 1984, \$10.50, plus \$1.50 postage and handling fee, plus 6% sales tax. Marlborough Publications, P.O. Box 16406, San Diego, CA 92116.

Flanagan, Joan. *The Successful Volunteer Organization*. 1981, 276 pages, \$13.95, Contemporary Books, 180 N. Michigan Avenue, Chicago, Illinois 60601.

Schreiter, Paul H. and Donald T. Nelson. *The Thirteen Most Common Fund-Raising Mistakes, and How to Avoid Them*. 1982, 90 pages, \$14.95, Taft Corporation, 5125 MacArthur Blvd., N.W., Washington, D.C. 20016.

O'Connell, Brian, *Board Member's Book*, The Foundation Center, 1985.

### VIDEO TAPE

Klein, Kim. *Fundraising Seminar in Five Parts*. Available on loan from Valley Volunteer Center, Pleasanton, California (415) 462-3570.

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## REFERENCE COLLECTIONS

The Foundation Center has a nationwide network of reference collections for free public use. The following is a reference collection operated by The Foundation Center. It offers the widest variety of service and most comprehensive collection of information pertaining to private foundations and other grant makers.

The Foundation Center  
312 Sutter Street  
San Francisco, CA 94108  
(415) 397-0902

Other reference collections are available through cooperating libraries and nonprofit agencies. To check on new collections, call toll-free 1-800-424-9836.

## CALIFORNIA COOPERATING COLLECTIONS

Grantsmanship Resource Center  
Junior League of San Jose, Inc.  
960 West Hedding, Suite 220  
San Jose, CA 95126  
(408) 244-5280

San Diego Community Foundation  
525 "B" Street, Suite 410  
San Diego, CA 92101  
(619) 239-8815

California Community Foundation  
Funding Information Center  
3580 Wilshire Blvd., Suite 1660  
Los Angeles, CA 90010  
(213) 413-4042

Peninsula Community Foundation  
1204 Burlingame Avenue  
Burlingame, CA 94011-0627  
(415) 342-2505

California Community Foundation  
4050 Metropolitan Drive #300  
Orange, CA 92668  
(714) 937-9077

Orange County Community  
Development Council  
1440 East First Street, 4th Floor  
Santa Ana, CA 92701  
(714) 547-6801

Community Foundation for  
Monterey County  
420 Pacific Street  
Monterey, CA 93940  
(408) 375-9712

Santa Barbara Public Library  
Reference Section  
40 East Anapamu, P.O. Box 1019  
Santa Barbara, CA 93102  
(805) 962-7653

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Riverside Public Library  
3581 7th Street  
Riverside, CA 92501  
(714) 787-7201

California State Library  
Reference Services, Rm. 309  
914 Capitol Mall  
Sacramento, CA 95814  
(916) 322-4570

Tuolumne County Library  
465 S. Washington Street  
Sonora, CA 95370  
(209) 533-5707

Santa Monica Public Library  
1343 Sixth Street  
Santa Monica, CA 90401-1603  
(213) 458-8603

### **Volunteer Centers -- California**

Volunteer Centers are located throughout California. While their main service is recruitment of volunteers, many Volunteer Centers provide volunteer-related training (including workshops on fundraising). Contact your local Volunteer Center to assess what resources are available. In particular, the following Volunteer Centers offer fundraising-related workshops and maintain fundraising literature in their libraries:

- **Volunteer Center of Sonoma County**  
1041 Fourth Street  
Santa Rosa, CA 95404  
(707) 544-9480
- **Valley Volunteer Center**  
333 Division Street  
Pleasanton, CA 94566  
(415) 462-3570
- **Volunteer Center of Orange County**  
1440 East First Street  
Santa Ana, CA 92701  
(714) 953-5757
- **Volunteer Center of South Bay Harbor - Long Beach Areas**  
1230 Cravens Avenue  
Torrance, CA 90501  
(213) 212-5009

### **VOLUNTEER: The National Center**

The National Center is a national nonprofit organization which provides information on all aspects of volunteerism (fundraising included) and provides training and technical assistance. A list of publications is available at no charge.

**VOLUNTEER: The National Center**  
1111 N. 19th Street, Suite 500  
Arlington, VA 22209  
(703) 276-0542