



A Top Ten List of Fund-Raising Essentials

Get It Done. Do It Right

Whether you like him or not, David Letterman now has the longest late-night hosting career in the United States. To recognize his accomplishment, we thought a Top Ten List was in order. Here are ten fund-raising essentials for the development officer. Our list is not necessarily in order of importance, nor is it particularly funny (sorry Dave) ... but they are certainly essential to reaching your organization’s fund-raising potential.

- **Communicate with your donors.**

Simple and timely thank you notes make a real difference to your donors. Incorporate a personal touch whenever possible to keep their enthusiasm high and to demonstrate your personal interest in them. Invite a donor to host a lunch and tour for new donors or prospective donors, or ask a donor to serve in an advisory capacity.

- **Write down your organization’s goals, including fund-raising goals.**

Having an agreed-upon plan of attack with measurable goals helps the team focus on success. If nothing else this makes it easier to celebrate your successes with the team. And, remember to revisit and update the plan periodically.

- **Involve your Board.**

Educate your Board on their role in fund raising for the organization and the opportunities which present them-

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The Essentials of Preparing for a Campaign

Ready... Set... Are you Ready?

***Most fund-raising campaigns are won or lost...
long before the kickoff.***

How do you know when your fund-raising campaign will be successful? It’s when the right people are asking the right prospects, in the right way, for the right amount of money — for the right reason and at the right time. Sounds like an easy walk in the park — right?

Getting to that right point in your fund-raising campaign means that you have successfully orchestrated several elements through a delicate process. This will more than likely include volunteer involvement and recruitment, strategic or operational planning with internal peers, and perhaps external constituents, development of a strong case for support, more than likely a planning study, and leadership cultivation. . . just to name a few.

Most fund-raising campaigns are won or lost long before the kickoff. By the time your campaign kick’s off the public phase, it should already be gathering momentum. Reaching this goal is impossible without advance preparation.

A state of pre-campaign readiness is essential to success. This phase is important for a number of reasons. It’s an essential organizational planning exercise to research and discover the right reason for a campaign. Equally important, the pre-campaign phase is a process of volunteer and stakeholder involvement, that is essential to building effective advocates for your campaign.

Select and enlist members for ad hoc committees to assist with the planning process.

No individual can manage the intricate process of managing a campaign single-handedly. Even if it were possible, it would not be a wise decision to “do it all” yourself. Empirical research consistently demonstrates that volunteers donate at a much higher frequency than non-volunteers. Thus, the key part of the equation is to simply get more people engaged at an early stage in your campaign efforts. By dividing assignments among committees with clearly defined responsibilities, the planning for your campaign can proceed in a more orderly fashion.

Volunteer committees can be organized to examine your organization’s mission and programs. Another group can conduct prospect research

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Ready . . . Set . . . *Are You Ready?*

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and identification, and in time others may review and approve the case for support, organize and conduct awareness and cultivation events, and plan the kickoff. The most important committee should be your campaign steering committee (or your Board's standing development and/or executive committee). The committees should be constructed with individuals representative of all your significant constituencies, including administrative staff, trustees, foundations, friends, and the community-at-large.

Implement a strategic planning process.

The best way to determine your fund-raising objectives, and to set directions for a more vital future, is to use the strategic planning process. While we increasingly hear from some development professionals that it is no longer possible to plan five years into the future, we remain steadfast in our belief that planning for the future is a critical element for the successful non-profit organization. Donors give, in our experience, to organizations that can provide a solution to a known problem and a more desirable future.

This series of steps will enable your organization to become more effective in fulfilling its mission in several different ways.

- 1. *Articulate your mission and relate your fund-raising goals to it.*** When interpreting your mission in context of fund-raising, the perspective must always be that of the prospective donor. Your goals should be oriented toward the future: and, how your organization will better serve the community and fulfill its mission, as the result of a successful campaign.
- 2. *Evaluate your strengths and weaknesses.*** Examine the human, financial, and material resources available to your development program. Your plans should be informed by the input and opinions of a variety of external sources or experts. Identify areas that may impede the progress of a campaign so that you may address them before they become a serious problem.
- 3. *Consider various possible scenarios and then pick the best one.*** At this point you will be finalizing your strategic plan for the organization and defining the scope of your fund-raising campaign. You will be effectively advancing from what you might do to confidently determining the general purpose and goals of your campaign.

Your goals should be oriented toward the future how your organization will better serve the community, because of a successful campaign.

- 4. *Validate the financial plan.*** For this, organizations typically conduct a fund-raising planning study; a series of personal, confidential interviews with those who are in the best position to make your campaign a success. The study tests the potential donors and key stakeholders' perceptions and attitudes toward your organization, and helps you determine your level of readiness to conduct a campaign. The study will give your most important constituents a voice in planning the campaign; thus, it also will encourage them to feel ownership for it and to commit to making it a success.

A fund-raising planning study will give your most important constituents a voice, encouraging them to feel ownership for the campaign.

Making It Happen.

It takes a high degree of research, energy, and direction to advance your fund-raising campaign to the point where the right people are asking the right prospects, in the right way, for the right amount of money, for the right reason, at the right time. Our experience has been that successful development efforts are those which are strategically conceived, carefully planned, and professionally implemented.

It is not unusual for organizations to begin talking with professional consultants as much as two years before starting the campaign. You can make your campaign happen in the most successful way if you prepare appropriately, set in motion the series of steps toward success, and go with an experienced fund-raising firm.



Get it Done. Do It Right.

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selves at every turn. Keep them involved and interested in the current fund-raising goals of the organization as well as trends in the fund-raising industry.

- ***Appreciate your donors' commitment.***

Your organization is not the only one approaching your donors. Remember that each person who gives to your organization does so after thoughtful evaluation of all of those other requests.

- ***Remember the individual.***

Individuals account for approximately 87 percent of all charitable giving in the United States. While it is important to approach corporate America, remember individual donors and cultivate them as well.

- ***Take the opportunity to educate your donors.***

Donors to your organization have aligned themselves with you, and your organization. Help them build a true sense of pride in their affiliation — and continuously provide the information they need to become ambassadors.

- ***Know your donors.***

Keeping up with your donors' interests, relationships, and reasons for giving helps your organization keep them involved with you and keeps your relationship with them fresh.

- ***Keep accurate records.***

Track your prospect lists and contacts, pledges, and in-kind gifts in a usable, accessible format. There are lots of valuable software packages available for this purpose. Pick one that fills your needs and commit to making it work.

- ***Keep your skills current.***

Active participation in professional associations and networking with others in your field keeps your skills sharp, your outlook fresh, and your enthusiasm high.

- ***Call a professional.***

Nonprofits often try to cut costs by doing as much as possible on their own and are often blessed with multi-talented go-getters. When needed, hire a professional to design your print materials, advise you on new fund-raising techniques, and develop your capital campaign. This will free you up to focus on your already demanding job, and will pay off in the long-run for your organization.

As soon as we developed this list of ten essentials, we started thinking of more, but we are confident that if you focus on these ten, there will be plenty of cheer to go around!



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A Goal Getter Quiz:

Are You Ready to Launch a Campaign?

Pre-campaign preparation is essential to the success of your next capital (or major gifts) fund-raising effort. Test your readiness by taking a moment to answer the following questions:

Have you involved your board and other key donor constituencies in planning and preparing for the campaign?

Yes No

Does your organization have a strategic plan that describes the future you envision, and how you intend to get there?

Yes No

Has your (five-year) financial plan been validated through a planning study?

Yes No

Have you provided your key prospective donors with an “insider’s briefing” on your plans, and an opportunity to offer their input?

Yes No

Have you prepared a detailed, step-by-step plan of campaign and shared it with key board and staff members?

Yes No

Have you reviewed the results of the last major fund-raising campaign your organization conducted?

Yes No

Have you researched, reviewed, and evaluated your top 50 to 100 donor prospects?

Yes No

Have you prepared a strong case for support, written from the viewpoint of the donor?

Yes No

Have you identified and evaluated the best candidates for campaign general chairperson, and other leadership positions?

Yes No

If you could “yes” to all of these questions, then you are to be commended, and may need a raise! If you can not answer “yes” to each of these questions, you may benefit from an initial consultation with fund-raising counsel. We have developed a set of guidelines to assist you in preparing for a winning campaign. To receive a copy of this guideline or any of our other publications, visit our website, or send an inquiry to info@goettler.com.