



Achieve Resource Library Catalog

June 1, 2009

Annual Fund

Communications

2008 GLA Solicitation Communication Calendar

Highlights periods when certain tasks must be done, such as selling tickets and sending out newsletters.

Guidance - Developing A Communications Plan For Donors

This guidance document shares ways to think about how to communicate with donors to keep them informed and engaged.

E-Mail Solicitations

Email Solicitation

Provides recap of recent accomplishments and items the donor has helped provide, with links to the Web site for testimonials and photos, asks for e-donation.

Guidance - E Solicitation And Beyond

This guidance document provides an overview of how to effectively use the Internet to do more than simply solicit gifts.

Major Gifts

Guidance - Major Gifts An Overview

This guidance document explains the concept that major gifts require something deeper than donor ability-major gifts require an organization to also have a culture that understands major donors.

Overview

ABC Foundation Annual Fund Plan

Outlines a strategy for developing a timeline for solicitations and for maintaining relationships with donors.

Achieve White Paper on Fundraising in a Tough Economy

Tips and strategies for success during troubling economic times.

Annual Fund Plan Monthly Time-line - Great Learning Academy

Defines Annual Fund Plan in a monthly timeline for internal development staff.



Annual Fund Summary and FAQ for All Staff

Explains to staff the goals of the current campaign, outlines the process to conduct it and gives a sample e-mail that they can use to solicit friends, family and others in the community.

Fundraising Action Plan

Excel document featuring action plan for fundraising in a tough economy.

Guidance - Annual Fund How Do You Define Success

This guidance document shares the criteria for determining success in your annual fund program.

Guidance - Characteristics of A Strong Fundraising Program

This guidance document will explain important considerations and enable you to examine the strengths of your fundraising program.

Guidance - How To Create A Development Plan

This guidance document details the considerations for creating a holistic fundraising program

Guidance - What Constitutes A Healthy Annual Fund

This guidance document defines how to measure success in the annual fund.

Great Learning Academy Annual Fund Plan

Sample Annual Fund Plan that outlines strategy, timetable, duties, and particulars necessary to initiate and run an Annual Fund Campaign.

Presentation - Annual Fund Development

PDF of Webinar presentation on how to build an annual fund program.

Presentation - Fundraising in a Tough Economy

PDF of Webinar presentation on Fundraising in a Tough Economy.

Worksheet Building The Case For Support

Consider why your organization is worthy of support and make certain that is clearly communicated to donors-use this worksheet to help.

Performing the Ask

Guidance - Making The Solicitation Keys To Success

This guidance document has insights on making the ask and things to consider when preparing to solicit a gift.

Guidance - Responding to a 'No'

Ways to recover from hearing a 'no' at a gift solicitation.

Guidelines For Staff On The Ask

Gives examples of what staff can say when approaching colleagues, friends and family for support



Prospect Research

Annual Fund Planning Template

A planning checklist to use when getting organized to develop an Annual Fund Plan.

Guidance - Individual Prospect Research What You Should Know

This guidance document explores the concepts of donor research, where to get info and how to collect it.

Solicitation Letters (board)

ABC Foundation Board Ask

Explains what great support the board already has offered, touts successes and asks for continued support.

Solicitation letters (donors)

ABC Foundation Announcement of Matching Support

Announces a matching grant made by a supporter or foundation and asks for help to meet the match.

ABC Foundation Email Ask

Gives mission, brief case, progress report and provides links for an email gift ask.

Annual Fund Solicitation Letter for \$1-\$249

Letter from foundation president asking the recipient to join him in making a gift. Letter also contains an ask to join a gift club.

Annual Gift Letter Alumni Version

Letter from an alumna asking fellow alumni for gifts.

Guidance - Writing Solicitation Letters What You Should Know

This guidance document provides the four key elements to consider BEFORE you send out a mail solicitation.

Solicitation Letters (renewal)

Annual Campaign Renewal Letter

Letter to current donor recalling achievements of past year and asking for continued support.

Annual Fund Letter for Renewal Gifts

Letter to current donor recalling achievements of past year and asking for continued support.

Donor Renewal Letter from Board Member

Letter reminding donor of previous gift, updating donor on progress, reminding donor of mission and asking to join board member in making gift.



Solicitation Letters (Second Ask in Same Year)

Second Ask With Testimonials

This letter asking for additional support gives testimonials from scholarship recipients.

Solicitation Letters (Staff)

ABC Foundation Staff Ask

Letter explains what great work the organization is doing and asks for staff support for the cause.

Solicitation Letters (Volunteers)

ABC Advisory Committee Ask

Letter asking for support from the advisory committee- from the chair of the committee.

Stewardship

Communications and Stewardship Overview

Just how do you blend communications and donor stewardship in a meaningful way?

Guidance - Essentials of Good Stewardship

This guidance document outlines what is meant by stewarding donors and what donors expect from the nonprofits they support.

Guidance - What Is Moves Management?

This guidance document describes the process for managing donor relationships in an effective way.

Thank You Letters

ABC Foundation Thank-You (Tax Records)

A letter from the organization president noting a basic thank you and documenting amount, date, check # for gift. Also, encouraging a renewal at the start of the calendar year.

Sample GLA Thank You Letter

A sample note from a committee member to a donor reiterating the organization's mission and thanking them for support.



Board Governance

Board Assessment

Assessing the Board's Role

A scoring system that allows boards to measure their effectiveness in all governance areas.

Board Chair Job Description

A best practices resource for developing a board chair job description.

Board Governance - A Checklist

The Board and Executive Director can use this checklist to see if the board is adequately participating and knows enough about the organization.

Board Meeting Evaluation

Attendance issues? Perhaps you're meeting too much or just do not have enough substance in the meeting. An evaluation after every meeting can be a great tool to find out what board members think of each meeting and allow suggestions on how to improve it.

Board Members Self Evaluation

In an effort to create a culture of accountability it is helpful to have every board member evaluate their own performance annually. The questions should be reflective of the expectations and the complete evaluations collected by the governance committee. This sample form is a great starting place.

Trusteeship Questionnaire

Self-reflection to be used at a retreat; tests board's knowledge of the organization - but can also be used to periodically check in with the board.

Board Bylaws

Board Bylaws

This set of sample bylaws should provide a very good start to creating your own governing documents.

Bylaws Example

Sample Organization Bylaws

Guidance - Considerations For Developing Bylaws

This guidance document will explain important considerations when engineering your organizational bylaws (beyond the legal requirements).

Board Governance Overview

Essential Fundraising Tasks Checklist

Board activity is necessary to fundraise -use this list to ensure the board is participating.



Executive Session

From time to time many boards need time to reflect and discuss issues that are not suitable for staff consumption. The use of executive sessions makes this possible. This brief document will help you understand the use of and instances when an executive session is appropriate.

Guidance - Board Structure

This guidance document will describe ways to ensure that the board structures itself to be effective and efficient with its time so it can focus on the most important issues.

Guidance - Guidelines To Help Your Board With Fundraising

This guidance document provides a list of ways to move your board toward fundraising and assist them with raising money.

Guidance - How Do Boards Change With Organizations

This guidance document explores the ways boards mature and the key process to move a board from program oriented to governance oriented.

Guidance - How To Engage Your Board Through Board Structure

This guidance document offers insights on how to use board structure as a way to fully engage board members and utilize their expertise.

Board Grid Overview

Board Member Giving Grid

Shows annual fund gifts by board members over time.

Board Member Prospect Matrix

Lists qualities and behaviors sought in a board member. Also, can be used by the board in nominating additional members.

Board Member Responsibilities

Board Member Responsibilities

Expectations of board members re: meetings, staff relationships, conflict of interest, etc.

The Consent Agenda and How to Use One

A productive board meeting is key to a productive board. Follow the consent agenda and break old habits!

Guidance - Assessing Board Fundraising

This guidance document offers key questions to ask in an effort to determine what the board understands fundraising to be and if they are engaged in it.



Guidance - What You Should Include In A Board Manual

To be used for either board recruitment or orientation, this guidance document has a list of sections needed for a solid board manual.

Board of Fundraising Events

Board Private Events for ABC Foundation

Whom to invite, the purpose of such an event, where to turn for help.

Guidance - How To Make A Board Member's Fundraising Event Successful

This guidance document provides ideas and insights on what will make events hosted by board members successful for everyone.

Board Retreats

Guidance - How To Plan A Successful Board Retreat

This guidance document outlines the key considerations to plan and conduct a successful board retreat.

Conflict of Interest Policy

Conflict of Interest Policy

Describes what conflict of interest is and how to disclose and handle instances of such conflict.

Capital Campaign

Campaign Budgets

Campaign Expense Categories

A variety of campaign expense categories including some you might never have considered.

Guidance - Capital Campaign Budgets

This guidance document demonstrates that campaigns require a good knowledge of what the expenses might be.

Campaign Case

Format for Case for Support

Creating a good case is essential to a successful campaign and formatting it is critical so it is compelling and easy to read.



Format for Case for Support

Without a solid case raising money for a campaign can be difficult. Examine a possible way to format your case.

Guidance - What is a Case Statement

This guidance document outlines the contents of a good campaign case statement.

Campaign Manual

Guidance - What is a Campaign Manual

This guidance document details the importance of a good campaign manual.

Communications

Campaign Communications Plan

Crafting a communication plan for a campaign requires attention to detail. This sample plan takes into consideration many of the necessary factors.

Guidance - Developing A Campaign Communications Plan

This guidance document details what needs to be considered when constructing a communications plan for a campaign.

Gift Tables

Gift Table Example-\$5M

Example gift table for a \$5 million dollar campaign.

Gift Table Worksheet

Creating a gift range table for a campaign requires knowing who can and is likely to contribute and at what level. This worksheet offers a way to manage that information for the creation of a gift range table.

Guidance - What is a Giving Pyramid

This guidance document provides an overview of campaign giving in pyramid form to emphasize that capital campaigns require large gifts at the start.

Overview

Guidance - Are You Ready For A Campaign

This guidance document poses key questions you should consider when determining if your organization is truly ready for a campaign.

Guidance - How Do You Choose Campaign Counsel

This guidance document demonstrates how choosing the best counsel for a campaign is fundamental to success.



Guidance - How Do You Talk With Your Board About A Campaign

This guidance document offers ideas on how to introduce the idea of a capital campaign to your leadership.

Sample Pledge Form

A simple to understand pledge form can make it easier for everyone- including donors.

Peer Screening

Guidance - What You Should Know About Peer Screening

This guidance document details the importance and impact of using peer screening in preparing for a capital campaign.

Peer Screening Questions

Use these sample questions to create a peer screening review form.

Peer Screening Questions

Just what questions you ask during a peer screening are important...see a sample of them here.

Performing the Ask

Guidance - Steps In Asking For A Gift

This guidance document details the process of asking for that important capital campaign gift.

Corporations

Agreements

Corporate Donor Intent Statement

Corporations expect organizations to have a professional process in order and having a well crafted intent form shows you mean business.

Corporate Sponsorship Agreement

A good sponsorship agreement makes it clear what the deliverables will be.

Corporate Overview

Abbreviated Corporate Sponsorship Proposal

This sample document will help you articulate the right components for your corporate ask.



Corporate Ranking Worksheet

It can be difficult to manage which corporations to approach and who the best contact person is there. This worksheet can be used to assist in the management of the process.

Seeking Corporate Support For Sponsorships And In-Kind Gifts

This guidance document details how to consider the best request of a corporation - in-kind, product, or financial.

Corporate Proposals

Guidance - Writing a Winning Sponsorship Proposal To A Corporation

This guidance document describes the components of common corporate proposal.

Sample Business Donation Request

Often a corporate request is a simple ask for a small gift. This sample can guide that request.

Corporate Sponsorship Grid

Guidance - Developing A Corporate Sponsorship Grid

Use this guidance document to create a 'sponsorship at a glance' piece for easy and effective message communication.

Guidance - Joint Partnerships

This guidance document looks at the idea of cause related marketing as a partnership opportunity.

Sponsorship Tracking Chart

Track your corporate sponsors by event.

Prospect Research

Guidance - Corporate Prospect Research

This guidance document shares insights about how to identify corporations that might be approachable.

What is a Feasibility Study?

The feasibility or planning study is an important component to preparing for a successful capital campaign.

Stewardship

Guidance - Stewarding Relationships With Corporate Event Sponsors

This guidance document offers perspective on the idea that, like individuals, corporations need to be stewarded.



Sponsorship Overview Table For Prospects

Stewardship starts after the gift is received and begins the next ask process. Track the details of corporate giving with this table.

Development Department

Case Statement

Case For Support

A sample case for support to use as a guide for your thinking as you create your own case for philanthropy.

Case Outline

Examine what the flow of a case for support and case statement might be.

Development Function Review (Audit)

Sample Development Audit

An outside review of your development department can yield big results and encompasses more than fundraising. This sample represents the kind of findings you might see as a result of a development audit.

Development Overview

Contact Log By Type

Effectively track the development activity for board and staff.

Development Plans

Development Plan Outline

Sample outline of a development plan to ensure that you have considered some key steps for your fundraising plan.

Mail "Dos" for Success

Four tips to help ensure that your direct mail letter gets opened...and read!

Solicitation Calendar

A sample solicitation calendar to make certain that you have carefully planned the timing of all activities.

Gift Acceptance Forms/Pledge

Donor Intent Form

This pro forma can be used to create a solid donor intent form.



Gift Acceptance Policy

Sample gift acceptance policy to use as a guide.

Guidance - Gift Acceptance Policies The Basics

This guidance document details the basics for a 'starter' gift acceptance policy.

Sample Gift Acceptance Policy – 2

Sample gift acceptance policy to use as you create your own.

Job Description

CEO Job Description

This provides the components of a typical CEO job description.

How to Choose and Work with a Consultant

Understanding how to choose and work with a consultant will produce the best outcome for the client. This guide offers tips to get the most from your next consulting relationship.

Intern Job Description

Hiring an intern? This is a guide to creating a useful internship job description.

Prospect Management

Prospect Tracking Tool Moves Management

A tool to use when keeping track of contacts and tracking interaction and progress with key donors and constituents.

Prospect Worksheet

Managing the contacts in your prospective donor files takes an eye for detail. This pro forma might help.

Prospective Table Sponsors

Tracking who has supported your event in the past, at what amount and when is critical for solicitation and stewardship.

Solicitation Call Log

A call log can be very helpful to manage the flow of activity and to ensure that activity is being overseen.



Foundations

Common Grant Applications

Common Grant Application Form

Example of a uniform grant application form used in many states by all foundations in the region.

Common Grant Application Sample

Use as a framework as you prepare your proposal.

Communications

Corporate Sponsorship Press Release

Part of the motivation for corporations to support nonprofits is for the community goodwill. This press release will aid in that effort.

Guidance - Developing A Communication Plan For Foundations

Having a well thought out approach with funders is as important as including how you will continue to communicate after a grant is made. This guidance document explores grant stewardship.

Guidance - Developing A Communication Plan With Corporations

This guidance document details the distinction between a partnership and sponsorship.

Foundation Proposals

Proposal Overview for Discussion Purposes with Foundation

Thinking strategically about how and what you will discuss with a potential funder should not be a shoot from the hip. This sample will help you think things through.

Proposal Request – Basic

A basic proposal is often the best approach and this sample proposal provides a great start.

Proposal Sample Narrative

Don't forget the narrative...funders need to clearly understand what your organization is trying to accomplish.

Sample Full Proposal For Project Support

What does a full proposal look like? This sample gives a good sense of proposal content and format.

Foundations Overview

Foundation Support Tracker

Helps track progress with foundation proposals and inquiries.



Guidance - Different Foundations Different Interests

Different foundations fund different projects. Use this document to help you understand how they set priorities.

Guidance - How To Apply For A Foundation Grant

Funders have rules and typically use a specific process for potential grantees to follow. Learn more about that process.

Presentation - Breaking Down Foundation Myths

PDF of Webinar presentation on best practices to use when working with foundations.

Letters of Inquiry

Basic Short Form Letter of Inquiry

A 2-3 page LOI form with a basic description of details for support.

Basic Short Form Letter of Inquiry

A basic and concise letter of inquiry can save time and effort when starting the proposal writing process.

Letter of Inquiry to Foundation for Support

Sample letter of inquiry to a foundation for support of programs.

Letter Of Inquiry To Foundation For Support

Sample letter of inquiry to a Foundation.

Logic Models

Logic Model Guidelines

Use this presentation to help develop your logic model.

Performing the Ask

Guidance - Preparing To Ask Foundations For Gift

This guidance document explores the concepts you should consider when seeking support from a foundation.

Proposal Budgets

Copy Of ABC Foundation Project Budget

A well conceived budget is key to being credible to a funder.

Project Budget With In Kind Support

Foundations are encouraged when an organization has in kind support as part of a project. This budget offers a way to display this support in your proposal budget.



Project Budget with In-Kind Support Listed

This budget shows which expenses are in-kind and which are funded by the nonprofit.

Sample Project Budget for Foundation

Sample project budget for foundation proposal.

Prospect Research

Prospect Research Foundations

Use this guidance document to review ways you can research the best foundation to fit your proposal.

Stewardship

Guidance - Stewardship Rules For Foundations

This guidance document examines how organizations should consider foundations and their program officers as part of the overall stewardship program.

Strategic Planning

Defining Activity Tasks for Strategic Planning Objectives

Tips for defining strategic plan activities/tasks for a planning committee.