

Making Everything Easier!™

3rd Edition

Fundraising

FOR

DUMMIES®

Learn to:

- Use the most up-to-date fundraising tools and technologies
- Host large events on a shoestring budget
- Communicate hope and possibility in a down-turned economy
- Use social media to keep donors engaged



Fundraising For Dummies[®], 3rd Edition

Table of Contents

[Introduction](#)

[About This Book](#)

[Conventions Used in This Book](#)

[What You're Not to Read](#)

[Foolish Assumptions](#)

[How This Book Is Organized](#)

[Part I: Putting Your Fundraising Ducks in a Row](#)

[Part II: Finding — and Winning Over — Donors](#)

[Part III: Telling Your Story and Building Your Brand](#)

[Part IV: Engaging Your Givers with the Right Campaigns](#)

[Part V: The Part of Tens](#)

[Icons Used in This Book](#)

[Where to Go from Here](#)

[Part I: Putting Your Fundraising Ducks in a Row](#)

[Chapter 1: Fundraising in a Changing Economy](#)

[Looking at the Stark Realities](#)

[Identifying cutbacks and understanding the reasons for them](#)

[Coping with staff reductions and shrinking budgets](#)

[Dealing with hard times that linger](#)

[Finding reliable sources](#)

[Finding Your Opportunity: A Crisis Is Too Good to Waste](#)

[Revisiting your mission](#)

[Paring your services \(or pairing up to provide them!\)](#)

[Nurturing the donor-agency relationship](#)

[Turning to cost-effective processes](#)

[Talking Up Your Successes and Building Relationships](#)

[Telling your story well](#)

[Engaging people who care](#)

[Developing relationships with key businesses and funders](#)

[Doing Your Best to Bring In the Dollars](#)

[Preparing Now for When Things Start Looking Up](#)

[Laying the groundwork to take advantage of an economic recovery](#)

[Moving forward with hope](#)

[Chapter 2: Identifying the Fruits of Your Fundraising Passion](#)

[Sparking Fundraising Action](#)

[Remembering why you signed on](#)

[Helping your donor catch the spark](#)

[Talking the fundraising talk](#)

[Building on Passion in the Nonprofit World](#)

[Competing for dollars](#)

[Keeping your organization going](#)

[Demonstrating Your Connection with Social Media](#)

[Chapter 3: Finding the Right Perspective: Fundraising Issues and Ethics](#)

[Inspiring or Selling: The Fundraising Debate Continues](#)

[Living with the stigma](#)

[Combining sales and ideals](#)

[Understanding the Ethics of Fundraising](#)

[Finding ethical standards organizations](#)

[Familiarizing yourself with the fundraiser's credo](#)

[Debunking Fundraising Myths](#)

[Myth 1: It's all about the money](#)

[Myth 2: You lie to get what you want](#)

[Myth 3: Your donor owes the world something](#)

[Myth 4: Wining and dining donors is all you do](#)

[Chapter 4: Writing Your Case Statement: Your Agency's Reason to Be](#)

[Stating Your Case](#)

[Understanding what the case statement is and how you use it](#)

[Getting started with your case statement](#)

[Making the Case Compelling](#)

[A Step-by-Step Guide to Writing the Case Statement](#)

[Step 1: The mission: Why are you here?](#)

[Step 2: The goals: What do you want to accomplish?](#)

[Step 3: The objectives: How will you reach your goals?](#)

[Step 4: Programs: What exactly do you provide?](#)

[Step 5: Governance: What's the anatomy of your board?](#)

[Step 6: Staff: Who are the people behind your services?](#)

[Step 7: Location: Where do you live and work?](#)

[Step 8: Finances: Is your organization financially responsible?](#)

[Step 9: Development: What will you do in the future?](#)

[Step 10: History: What successes are you building on?](#)

[Overhauling an Outdated Case Statement](#)

[Sharing Your Case Statement](#)

[Formatting your case](#)

[From paper to online posts: Putting the case statement to work](#)

[Chapter 5: Organizing Your Team: Board Members and Volunteers](#)

[Seeing the Big Picture: How Boards and Fundraising Fit Together](#)

[Understanding the board's duties](#)

[Knowing how your role fits with the board's work](#)

[Enlisting the Board to Help Advance Your Cause](#)

[Helping the board help you in fundraising](#)

[Balancing the attraction of high-profile board members](#)

[Walking your Board through Tough Decisions](#)

[Slating and prioritizing your issues](#)

[Knowing when to use reserved funds](#)

[Figuring out when to launch into uncharted waters](#)

[Helping your organization find clarity in challenging times](#)

[Discovering the True Value of Volunteers](#)

[Seeking volunteers](#)

[Establishing a productive relationship](#)

[Using your volunteers as fundraisers](#)

[Making use of baby boomers: Retirees as volunteers](#)

[Chapter 6: Creating a Winning Fundraising Plan](#)

[Drafting the Perfect Plan](#)

[Starting with the case statement](#)

[Identifying your goals](#)

[Building a needs statement](#)

[Assessing your existing resources](#)

[Determining what you need](#)
[Setting your financial targets](#)
[Putting the all-powerful giving pyramid to work](#)
[Getting started with the right methods](#)
[Discovering fundraising markets](#)
[Avoiding Plan Busters like the Plague](#)
[Budgeting Your Fundraising Efforts](#)
[Making sure you include everything in your budget . . . but don't overbudget](#)
[Figuring out the cost of raising money](#)
[Turning Elsewhere for Assistance](#)
[Knowing when to outsource](#)
[Using fundraising software](#)

[Part II: Finding — and Winning Over — Donors](#)

[Chapter 7: Getting the Lowdown on Your Donors](#)

[Finding Your Stakeholders](#)
[Recognizing Your Bread and Butter: Individual Donors](#)
[Understanding donor levels](#)
[Identifying possible donors](#)
[Doing Business with Corporate Donors](#)
[Finding Foundations That Care](#)
[Asking Your Board All the Right Questions](#)
[Where did you forget to expand your donor base?](#)
[Whom did you forget to ask?](#)
[Checking Out Potential Donors](#)
[Pursuing promising prospects](#)

[Finding the silver lining with unlikely prospects](#)

[Researching the Internet Way](#)

[Keeping Track of Your Donors and Their Contributions](#)

[Creating an effective donor information form](#)

[Keeping good donor records](#)

[Maintaining Confidence: The Issues and Ethics of Handling Personal Data](#)

[Chapter 8: Meeting Your Donor](#)

[Evaluating the Importance of a Visit](#)

[Preparing to Meet Potential Donors](#)

[Examining the Giving Relationship between the Donor and the Agency](#)

[Showing donors the value of their gifts](#)

[Getting more than money from your donors](#)

[Checking out what motivates giving](#)

[Considering Your Donor's Context](#)

[Engaging donors with limited means \(for now\)](#)

[Connecting with affluent donors](#)

[Meeting reluctant retirees on their level](#)

[Cultivating the Initial Relationship](#)

[Chapter 9: Cultivating Major Givers](#)

[Seeking a Major Gift Today for Tomorrow](#)

[Finding the Holy Grail of Fundraising — The Major Gift](#)

[Planning your way to major gifts](#)

[Cultivating donors who have a lot to give](#)

[Recognizing Major Donors for Their Contributions](#)

[Meeting your donors' expectations](#)

[Providing donor recognition](#)

Chapter 10: Asking for a Major Gift

Pushing through the Fear by Focusing on the Greater Goal

Accepting that you have to talk about money

Understanding that no doesn't equal failure

Remembering that you're a donor, too

Checking Out Your Attitudes about Money

True or False: Money is an exchange mechanism

True or False: Money is the root of all evil

True or False: Money can't buy happiness

True or False: Money talks

Figuring Out Who Should Ask for Money

Teaming up for dollars

Flying solo

Developing the Mechanics of Asking

Recognizing the equitable exchange

Using the tools of the trade

Knowing the donor

Checking out each step of "the Ask"

Moving Beyond No

Rating Your Yes-Ability

Following Up after "the Ask"

Chapter 11: Writing Winning Grant Proposals

Getting a Grip on Grants

Identifying Different Grant Givers

Choosing the Right Project to Get Funded

Starting from the ground up: Seed money

[Expanding your reach: Program funds](#)

[Building for the future: Capital campaigns](#)

[Laying the Groundwork for Grant Seeking](#)

[Turning to your board for support](#)

[Developing a grant proposal writing strategy](#)

[Looking at the grant process, step by step](#)

[Finding the Right Funder](#)

[Starting your search for funders](#)

[Zeroing in on your fundraising category](#)

[Using local sources first](#)

[Working your way away from home](#)

[Digging deeper to find the right grantor](#)

[Inquiring about Letters of Inquiry and Grant Guidelines](#)

[Getting Down to Business: Writing the Proposal](#)

[Creating a comprehensive cover letter](#)

[Providing an overview with the executive summary](#)

[Introducing your idea](#)

[Stating your program's needs](#)

[Outlining program goals, objectives, and evaluations](#)

[Detailing the program budget and budget narrative](#)

[Explaining your leadership, staffing, and location](#)

[Sharing your organization's history](#)

[Including the necessary extras](#)

[Following Up on Your Proposal](#)

[Putting a Positive Spin on No](#)

[Seeing Your Grant as a Relationship](#)

Part III: Telling Your Story and Building Your Brand

Chapter 12: Connecting for Profits: Sharing Your Story by Print, Mail, and Phone

Thinking through Your Communications Strategy

Evaluating your communications costs

Considering your communications options

Crafting a communications approach

The list! The list! Pull out your donor list!

Printing Only What You Need

Saving money on printing

Showing progress with an annual report

Taking the Direct (Mail) Approach

When direct mail works: Asking current donors to give again

When the most direct mail is e-mail

Figuring out what to send

To Call or Not to Call

Making your callers the good guys

Knowing your no-call responsibilities

Working the phones with a positive attitude

Chapter 13: Projecting Your Image in the Media

Getting the Media Exposure You Want

Realizing what the media can do for you

Making the first contact

Coming up with story ideas for the media

Working in Sound Bites: Public Service Announcements

Looking Good on Television

[Seeking airtime on the small screen](#)

[Preparing for a television interview](#)

[Remembering on-air cues](#)

[Taking Advantage of Print Opportunities](#)

[Making yourself quotable](#)

[Fixing mistakes in print](#)

[Leveraging Online Coverage](#)

[Posting your story everywhere](#)

[Filling a need for news with news feeds and blogs](#)

[Crisis Control: When Media Attention Is Unwanted](#)

[Getting the crisis under control fast](#)

[Drafting a disaster control plan](#)

[Chapter 14: Social Networking: What's the Connection for Your Organization?](#)

[Getting Started with Social Media](#)

[Surveying the basics of social media](#)

[Identifying who uses social media and what they can do for you](#)

[Building a Community of People Who Care](#)

[Feeling all a-Twitter](#)

[Connecting constituents with LinkedIn](#)

[Sharing the love on Facebook](#)

[Understanding What Your Social Media Users Want](#)

[Visibility and voice: Here we are!](#)

[Engagement and opportunity: Let me help](#)

[The freedom to choose: I want it my way](#)

[Taking the Plunge into Social Media](#)

[Making sure your messages work together](#)

[Tracking and evaluating results](#)

[Creating credibility and security in social media](#)

[The Big Dilemma: To Ask or Not to Ask?](#)

[Chapter 15: Getting the Most from E-Mail and E-Newsletters](#)

[Making the Case for E-Mail](#)

[Being Smart about E-Mail Campaigns](#)

[Figuring out who should receive your e-mails](#)

[Knowing what to say](#)

[Writing an e-mail that gets the results you're looking for](#)

[Avoiding E-Mail Mistakes](#)

[Don't use e-mail to spam](#)

[Don't be a sloppy e-mailer](#)

[Understanding the Power of E-Newsletters](#)

[Catering to your donors' interests](#)

[Creating your e-newsletter](#)

[Adding multimedia pizzazz](#)

[Automating e-newsletter delivery](#)

[Keep 'em coming back](#)

[Chapter 16: Ramping Up Your Web Site](#)

[Seeing How a Web Site Helps with Fundraising](#)

[Putting Your Web Site to Work for Your Organization](#)

[Evaluating your Web site](#)

[Building credibility for your organization](#)

[Adding Content and Keeping It Fresh](#)

[Putting your contact information front and center](#)

[Including information that saves time](#)

[Writing content yourself](#)

[Using existing materials](#)

[Linking to content on other Web sites](#)

[Considering the value of online media](#)

[Attracting Visitors to Your Site](#)

[Showing up in search engine results](#)

[Getting linked by other sites](#)

[Collecting Donations Online](#)

[Chapter 17: Extending Your Brand Online](#)

[Knowing Your Branding Basics](#)

[Assessing Your Brand](#)

[Tweaking your brand](#)

[Developing brand strategies](#)

[Blogging Your Way to Funds](#)

[Figuring the cost of blogs](#)

[Building your brand with an effective blog](#)

[Publishing Online to Boost Your Branding and Credibility](#)

[Getting published](#)

[Creating good online content](#)

[Joining Online Communities: Discussion Groups](#)

[Checking out nonprofit discussion groups](#)

[Promoting yourself through discussion groups](#)

[Partnering Online through Affinity Programs](#)

[Connecting with People through Association and Special-Interest Sites](#)

[Part IV: Engaging Your Givers with the Right Campaigns](#)

Chapter 18: Organizing, Implementing, and Celebrating Your Annual Fund

Understanding the Basics of Annual Funds

Designing Your Annual Campaign

Setting your goals

Timing your annual fund

Assembling your team

Choosing your fundraising tools

Rating your organization

Putting the Plan in Place

Understanding your approach: Donor research and planning

Choosing your materials

Five signs your plan is falling flat (and what to do about it)

Evaluating (And Celebrating) Your Annual Fund Drive

Planning for Next Time

Chapter 19: Planning a Special Event

Seeing How a Special Event Benefits Your Organization

Planning, Planning, Planning!

Putting together the best team

Selecting an event

Deciding the when and where

Setting expectations

Budgeting for the special event

Setting a timeline

Black Tie Optional: Organizing an Online Event

Using Webinars to inform and persuade

Chatting online with celebrities

[Following Up after the Big Event](#)

[Measuring goodwill](#)

[Evaluating the event's outcomes](#)

[Saying "Thank you!"](#)

[Gathering event lessons for next time](#)

[Chapter 20: Building Buildings, Nonbuildings, and Futures: The Capital Campaign](#)

[Gearing Up for the Big Campaign](#)

[Exploring Capital Campaign Types](#)

[Building bricks-and-mortar campaigns](#)

[Checking out endowment campaigns](#)

[Putting together project campaigns](#)

[Running combined campaigns](#)

[Selecting a Champion](#)

[Staging the Campaign](#)

[Testing the waters: Campaign feasibility](#)

[Setting your goal](#)

[Identifying lead gifts and challenge gifts](#)

[Going public](#)

[Following up with your capital campaign](#)

[Debriefing everybody](#)

[Chapter 21: Securing Major Gifts, Planned Gifts, and the Challenge Grant](#)

[Making a Perfect Match](#)

[Deciding on the major gift amounts for your organization](#)

[Getting to the heart of the major giver](#)

[Valuing the relationship: Stewardship in action](#)

[Creating a major gift strategy](#)

Preparing for Planned Gifts

Getting the gift that keeps on giving

Differentiating planned giving from other types of giving

Timing is key: Knowing when to start

Gearing up for planned giving

Making Money Go the Extra Mile: Challenge Grants

Understanding how challenge grants work

Managing a challenge grant

Chapter 22: Engaging the Corporate Giver

Understanding the Attitudes behind Corporate Giving

Making a difference in the community

You scratch my back, I'll scratch yours: Cause-related marketing

Finding the Right Corporations for Your Organization

Using the local community hook

Discovering where the CEO's heart lies

Finding out what serves the company's interests

Approaching a Corporate Donor

Researching the corporation ahead of time

Knowing your value to the donor

Putting together your presentation

Following up in a businesslike way

Chapter 23: Building and Growing Endowments

Endowing the Future

Understanding what an endowment is

Deciding whether you can (and should) build an endowment

Building an Endowment

[Getting your board to buy in](#)

[Explaining the value to donors](#)

[Making an endowment part of your overall fundraising effort](#)

[Managing an Endowment](#)

[Providing oversight and establishing policies](#)

[Seeking professional help to manage endowment dollars](#)

[Part V: The Part of Tens](#)

[Chapter 24: Ten Predictions about Fundraising](#)

[Huge Amounts of Wealth Will Be Transferred](#)

[Givers Will Become More Savvy](#)

[Attorneys General Will Become Major Regulators of Nonprofits](#)

[Women Will Play a Bigger Role in Giving](#)

[E-Giving Will Grow](#)

[Nonprofits Will Go Commercial](#)

[Nonprofits Will Increase Their Role in Community Leadership](#)

[Inheritance Tax Law Changes Will Change the Giving Game](#)

[Corporations Will Jump on the Cause-Related Marketing Bandwagon](#)

[Fundraising Costs Will Be Scrutinized](#)

[Chapter 25: Ten \(Plus One\) Great Opening Lines](#)

[“How about a little good news?”](#)

[“Would you like to watch the birth of a baby elephant?”](#)

[“Hi, Mrs. Jones, I just left a meeting where we were discussing . . .”](#)

[“I recently visited the program you sponsored. Very inspiring! I’d love to show it to you sometime.”](#)

[“Now, how can I help you?”](#)

[“Research shows that giving is good for your health.”](#)

"You have no idea how much good your last gift did for our organization!"

"More people go to zoos today than go to all sports activities combined."

"Seven out of ten of our city's families use United Way services in their lifetime."

"Hey, I just received this great picture! The new wing of the library is finished!"

"Cute dog!"

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**by John Mutz and
Katherine Murray**

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About the Authors

For more than two decades, **Katherine Murray** has specialized in writing how-to books for general audiences on a variety of topics, ranging from business to technology to parenting. A number of years ago, Katherine's writing led her into the nonprofit world, when she volunteered her research and writing skills to help selected nonprofit organizations with missions close to her heart. Since that time, Katherine has completed a certification in Fundraising Management from the IU Center on Philanthropy and become a kind of "fundraising coach" for small and struggling nonprofits. Katherine's recent books include *Green Home Computing For Dummies* with coauthor Woody Leonhard (Wiley) and *First Look Microsoft Office 2010* (Microsoft Press). As a member of the Society for Environmental Journalists, she writes articles and blogs about earth-care issues. You can follow Katherine's Twitter feed at <http://twitter.com/kmurray230>

John Mutz is a fundraising expert and speaker who has an extensive array of fundraising credits. He was named 1997 Volunteer Fundraiser of the Year by the Indiana Chapter of National Association of Fundraising Professionals. In 1999, John served as Chairman of the United Way of Central Indiana, which raised more than \$36.5 million. From 1996 to 1998, John served as Chairman of the Indianapolis Zoo, where he chaired a \$14.5 million fundraising campaign for White River State Park Gardens. From 1989 through 1994, John was the president of the Lilly Endowment, one of the nation's five largest private foundations, which supports the causes of religion, education, and community development. The Endowment included in its grant-making activity special grants intended to improve the financial viability of

nonprofit organizations. During his time there, the Lilly Endowment made the grant that brought the Fundraising School to the Center on Philanthropy at Indiana University Purdue University Indianapolis (IUPUI). In addition, the Endowment initiated the GIFT program, which utilized matching and challenge grants to create a network of community foundations that now covers all 92 of Indiana's counties.

In 1988, John was the Republican Candidate for Governor of Indiana, during which time he raised \$4 million for the campaign. He is also co-founder of the Indiana Donor's Alliance, a statewide organization of community foundations. In addition to his board positions, John serves as a regular speaker for the Executive Leadership Institute (National Association of Fundraising Professionals), the National Council of Foundations, and the Center on Philanthropy. He has also been a speaker for the Rocky Mountain Council of Foundations and Hillsdale College and has given dozens of speeches to community foundations. John served as Indiana's Lieutenant Governor from 1980 to 1988 and in 1999 retired as president of the state's largest electric utility. He currently serves as Board Chairman of Lumina Foundation for Education, a billion-dollar private foundation which supports access and success in post-high school education.

Dedication

To the tens of thousands of caring volunteers, staff, and development professionals who do all they can to give of their time, effort, and wealth in supporting the causes

close to their hearts. Because of you, the world keeps turning.

Authors'

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We would like to thank a number of people who have helped us by volunteering their anecdotes, fundraising tips, editorial prowess, and technical expertise during the writing of this book. First thanks go to Burton Weisbrod, Dan Yates, Marc Owens, Robert Payton, Ken Gladish, Peter Goldberg, Jeff Bonner, and Ken Bode, for their professional expertise and insights. Thanks also to the folks at Wiley, in particular Erin Calligan Mooney, Vicki Adang, and Amanda Langferman for their great, timely, and insightful help as we prepared this third edition. We are appreciative of Tammy Zonker, who reviewed the manuscript. A big thank you to our families for encouraging and supporting us in the midst of late nights, long hours, and looming deadlines. Special thanks go to Carolyn Mutz for getting us together to write this book and for creating the opportunity for a great collaboration.

Lastly, heartfelt thanks go to all the volunteers, staff members, and leaders in the many nonprofit organizations we have served throughout the years. We've been touched and inspired by your dedication and persistent work to make this world a better place, and we hope that this book makes your goals seem more reachable than ever.

Publisher's Acknowledgments

We're proud of this book; please send us your comments through our online registration form located at <http://dummies.custhelp.com>. For other comments, please contact our Customer Care Department within the U.S. at 877-762-2974, outside the U.S. at 317-572-3993, or fax 317-572-4002.

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Introduction

Chances are you were initially drawn to nonprofit work because of a cause you cared about — whether that cause was homeless families, environmental concerns, cutbacks in the arts, or public policy issues. You heard or saw something that touched your heart, and your mind opened up to the possibilities of doing something to help. Maybe your checkbook opened up, too.

Whether you wound up helping as a volunteer, joining a staff, or serving on a board, you most likely connected with the agency because, first and foremost, you believed in the work it was doing. At some point, you realized that the role of the fundraiser is right at the heart of the organization. After all, without funding, the agency wouldn't be able to do any of the good work that got you hooked in the first place.

As you certainly know, fundraising in any economic climate is a challenge, but raising funds in a time of financial upheaval is a challenge of new proportion. Not only is your organization vying with other groups for donors' attention, compassion, and financial gifts, but now you must swim against the tide of economic uncertainty, reduced assets, and general insecurity in the market. How do you encourage donors to give when they're fearful about their finances? How can you demonstrate the good stewardship of your group and share your success stories — all while reducing costs and furthering your reach? Is it possible to connect with your donors in new ways during economic hardship, honoring their contributions and inviting their engagement no matter how big the check they write today is?

Fundraising For Dummies, 3rd Edition, answers these questions and many more, offering practical, tried-and-true ways to raise the funds you need in any financial landscape. Whether you run a one-person development office or chair a 20-member board of directors, this book walks you through the process of assessing your fundraising climate, getting ready to raise funds, preparing a far-reaching fundraising plan, gathering your resources, and putting your plan in place. Additionally, this book shows you how to find and work with donors, set up a variety of fundraising campaigns, and explore effective, low-cost ways — such as reducing your four-color print budget and beginning to use social marketing techniques — to get the word out about the good your organization is doing in your community and around the world.

About This Book

No matter where you are on your fundraising journey, this book is here to help you find just what you need. You don't have to read it cover to cover to find value, but we do suggest that you start by taking a look at Chapter 1, which gives you a sense of the factors that influence raising funds in a shifting economic landscape. Then feel free to wander where your interests and most urgent needs lead you. When we cover a particular topic in more detail elsewhere in the book, we include a cross-reference so you can easily jump from chapter to chapter to read up on the areas that interest you most.

Throughout the book, we strive to make ideas and phrases easy to understand, putting things in simple terms with advice straight from the school of practical

experience. The idea is to give you effective fundraising techniques fast — ideas you can put in place right away — without requiring you to spend a lot of time with complicated concepts that will rarely, if ever, affect what you do in real-world fundraising for your organization.

Conventions Used in This Book

We use the following conventions consistently throughout the book:

New terms appear in *italics* and are closely followed by an easy-to-understand definition.

Boldface text either indicates keywords in bulleted lists or highlights action parts of numbered steps.

All Web and e-mail addresses appear in monofont.

When this book was printed, some Web addresses may have needed to break across two lines of text. If you come across a two-line Web address, rest assured that we haven't put in any extra characters (such as hyphens) to indicate the break. So when you're using one of these Web addresses, just type in exactly what you see in this book, pretending that the line break doesn't exist.

What You're Not to Read

Sidebar — the gray boxes set apart from the regular text — are side topics that may be interesting but aren't

exactly essential to the fundraising topics at hand. Sidebars may point out the background of a term or practice, for example, or give you additional details on a topic mentioned in the text. If you want to speed through the book and skip the sidebars, go ahead; no need to feel guilty.

Foolish Assumptions

We made some assumptions about you as we wrote this book. Basically, we think the following:

You're a current or aspiring fundraiser.

You're feeling the impact of the shifting economy and want practical ideas for effective fundraising.

Whether you have 20 years of experience or are just starting out, you'd like some fresh ideas and advice that will help you use the best approaches and technologies available today.

You may be anyone from a full-time staff member to a volunteer charged with fundraising tasks.

You don't have a huge staff or open-ended budget.

You care about the mission you're raising funds to support and want to make a positive difference.

You don't have time to waste; you need to get to work right away with ideas and tools that can help you succeed.