Achieve

Guidance. Resources. Success.

Resource Library Catalog

Summer 2010

Overview

The Resource Library Catalog provides a comprehensive list of the most up-to-date content contained within the Achieve Resource Library. The Resource Library was developed to provide our clients and subscribing members access to materials created through our consulting experiences. The Resource Library serves as an opportunity for those interested in enhancing their fundraising department to obtain knowledge and strengthen competence on fundraising methods and issues.

The Catalog is organized according to the following resource categories:

Each category contains the following resources:

- **Achieve White Paper** – instructional papers covering issues in the fundraising field
- **Big Idea Series** – newsletter series discussing major topics in the field of fundraising
- **Blog** – short briefs discussing relevant issues in the field of fundraising and nonprofit management
- **Interviews** – interviews with experts on topical issues in the field of fundraising
- **Guidance** – instructional documents describing how to use a template
- **Template** – sample documents and recordings used in fundraising
- **Webinar** – audio/visual presentations of specific issues in the field

The Resource Library is constantly growing and adjusting as our consulting experience grows. Good luck with your fundraising endeavors, and we hope that you find the Resource Library useful.

Annual Fund

The Annual Fund category contains the following sections: Communications; Major Gifts; Overview; Performing the Ask; Prospect Research; Solicitation Letters; Stewardship; and Thank-You Letters.

Communications

Achieve White Paper **- To Get Our Name Out There**
This article is about how organizations can successfully get their name out into the community and generate a public response to the organization. Specifically, an organization should lead with impact, focus on the cause, let others spread the good news, and show expertise.

Blog **- The Art of Communicating Bad News (July 2010)**

Tips on communicating difficult news to key stakeholders in your organization.

Blog **- Award Winning Websites: Tips For Increasing Connectivity and Engagement (June 2010)**

A few things to consider when developing web content.

Blog **- Your Nonprofit Newsletter—16 Potential Scenarios. (February 2010)**

Who knew that a simple email newsletter with three articles and a blurb about supporting the organization could have so many scenarios?

Blog **- The Language We Know (November 2009)**

Advice on fundraising communications.

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.

Template **- 2008 GLA Solicitation Communication Calendar**

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

Webinar **- Conversations with Donors**

You've heard all about face-to-face solicitations, and learned about in-person cultivation and stewardship activities, but what is it really like to have a one-on-one conversation with a donor? Gain insight into what it is like to sit across from a donor you have never met, and tactics to ensure that you leave the meeting having provided value to both you and the donor.

Webinar **– Blackbaud Now: Communication for Fundraising**

Consider essential ways to keep your donors informed through clear messaging.

Major Gifts

Achieve White Paper **- Major Gifts**

Major gifts are about building relationships. This article discusses how to build a major donor relationship through the following strategies: perspective, communication, conversations, relationship, and board engagement.

Blog **- Learning Major Gifts From A Youngster (June 2009)**

Most kids would be upset they did not have enough money for a vanilla shake.

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.

Webinar **- What Makes a Gift a Major Gift?**

Major Gifts are not one of the Seven Wonders of the World! Learn what defines a gift as "major" and the processes for moving conversations toward major-gift giving. Participants will also receive tools and resources for assisting with the major gifts process.

Overview

Achieve White Paper **- Weathering the Storm Together**

This article talks about how to strengthen ties with donors during economic downturns. Specifically it suggests using the strategies of pro activity, seeking donor counsel, and communication to cultivate donors during hard economic times.

Achieve White Paper **- Treating Donors as Shareholders**

Donors invest in nonprofit organizations through their contributions. Treating donors as stakeholders includes: communicating the organization's current and ongoing health with donors, sending quarterly newsletters, arranging stakeholder visits with leadership, and acting on key issues.

Achieve White Paper **- Fundraising in a Tough Economy**

Tips and strategies for success during troubling economic times.

Achieve White Paper **- Avoiding the Highly Contagious**

This article gives a new perspective on many typical special events. An organization needs to have specific goals for before and after the event while keeping the event in perspective of the overall fundraising plan. The article also provides tips on how to assess an organizations special event

Blog **- How Do I Build A Donor Base? (April 2010)**

New organizations struggle with building a donor base. It can be a daunting task. So how do you find a supporter and build a following?

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 **- What Constitutes a Healthy Annual Fund**

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

***Template* - 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.

Template **- Worksheet Building The Case For Support**

Worksheet to help develop the case for support.

Template **- Annual Fund Plan Monthly Time-line - Great Learning Academy**

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

Template **- 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.

Template **- Fundraising Action Plan**

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

Webinar - **Donors as Shareholders**

The for-profit sector has embraced the shareholder model for ownership, communication, and decision-making; yet nonprofit organizations have never really considered what might happen if we would treat our donors as shareholders of the organization. This webinar provides several ideas to strengthen donor relationships and fundraising efforts.

Webinar **- Moving Beyond Special Events**

Tired of chicken dinners yet? This webinar helps you develop a strategy for a new breed of events, and force yourself to document why you should have even one more event.

Webinar **- Integrating Multiple Solicitation Strategies into Your Annual Campaign**

Learn the multiple strategies utilized by savvy direct mail fundraisers. This webinar discusses strategies for soliciting an annual gift via direct mail and the four key elements of a direct mail piece, why they matter and the order in which they need to be considered.

Webinar - **Fundraising During Tough Economic Times**

Don't make the classic mistake of stopping donor contact during tough economic times. Protect your organization and improve its standing by keeping your donors informed and engaged.

Webinar **- Annual Fund Plan Development**

It's all in the plan...from letters to newsletters to events. Just what works!

Performing the Ask

Blog **- The Emergency Fundraising Appeal: Is It Worth It? (February 2010)**

When organizations make emergency fundraising appeals to the public, it may not have the long term reaction the organization wants.

Guidance **- Making the Solicitation: Keys to Success**

This guidance document contains suggestions 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.

Template **- Guidelines for Staff On The Ask**

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

Webinar **- Year-End Giving**

The holiday season is near; your donors are in giving spirits, so you should ask them, right? Learn what works and what doesn't as well as what donors want and need as the year draws to an end.

Webinar **- The Crucial Seconds Before Your Direct Mail Appeal Hits the Trash!**

Learn the techniques used by savvy direct mail fundraisers to avoid having their direct mail thrown away without it being read. This webinar provides four key elements of a direct mail piece, why they matter and the order in which they need to be considered.

Prospect Research

Blog **- Facebook: A Form of Donor Profiling? (May 2010)**

Is it possible that Facebook incorporates an old fundraising tactic of donor profiling?

Blog **- The Time Value of Money (February 2009)**

Hey, what about the individuals that volunteer for our organization?

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.

Template **- Annual Fund Planning**

A planning checklist to use when getting organized to develop an annual fund plan.

Solicitation Letters

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.

Template **- ABC Foundation Board Ask**

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

Template **- ABC Foundation Announcement of Matching Support**

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

Template **- ABC Foundation Email Ask**

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

Template **- 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.

Template **- Annual Gift Letter Alumni Version**

Letter from an alumna asking fellow alumni for gifts.

Template **- Annual Campaign Renewal Letter**

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

Template **- Annual Fund Letter for Renewal Gifts**

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

Template **- 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.

Template ***-*** **Second Ask With Testimonials**

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

Template **- ABC Foundation Staff Ask**

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

Template **- ABC Advisory Committee Ask**

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

Stewardship

Blog **- Four Ways To Ask Donors For Input Using Technology (April 2010)**

When thinking about donor engagement, organizations need to consider input opportunities. Today's technology and social media tools provide the means to enable this interaction to occur.

Blog **- Stewardship When The Chips Are Down! (August 2008)**

What is the cost of not stewarding your loyal donors?

Blog **- Out With The 80/20…It Is Now 20/60/20 (November 2008)**

Times are tough but it may just come down to looking at the facts and figures...

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.

Template **- Communications and Stewardship Overview**

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

Webinar **- Moving the Conversations Offline**

Your organization has found success with online giving, but what now? Learn strategies for moving the relationship offline—from virtual to the real world—and how to begin to steward their past support and cultivate a long-term relationship that you and the donor will both value.

Webinar **- Building Better Donor Relationships**

Fundraising is all about relationships. Are you spending 90% or more of your time in cultivation and stewardship activities, or just soliciting gifts for the sake of making asks? This webinar provides lessons on how to continue building relationships with your donors, as well as strategies for developing cultivation processes that make asking for support a natural and highly successful activity.

Webinar **- Opening the Discussion on Planned Giving**

Presented in conjunction with the planned giving experts from Renaissance, this webinar discusses how to identify a planned giving opportunity, how to use some of the basic tools of planned giving and how to open the discussion of planned giving with your staff, board, donors and volunteers.

Thank You Letters

Blog **- A Side of Thanks with My Gift, Please… (February 2010)**

What do our donors want and how do we ensure that we're meeting their needs? If they have to request thanks and appreciation from you, then you're probably not.

Template **- 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.

Template **- 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

The Board Governance category contains the following sections: Board Assessment; Board Bylaws; Board Governance Overview; Board Grid Overview; Board Member Responsibilities; Board Fundraising Events; Board Retreats; and Conflict of Interest Policy.

Board Assessment

Template - Assessing the Board's Role

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

Template - Board Chair Job Description

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

Template - 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.

Template - 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.

Template - 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.

Template* - *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

Guidance - Considerations For Developing Bylaws

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

Template **- Board Bylaws**

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

Template **- Bylaws Example**

Sample Organization Bylaws.

Board Governance Overview

Achieve White Paper **- Expectations…What Should Staff Expect from Board Members**

This article discusses staff and board member interactions. It also gives an example of interactions from a board member's perspective.

Big Idea Series **- Hypocrisy in Fundraising: The Ego at Work (August 2010)**

Too often today, organizations have made fundraising and cultivation about stroking egos—both board members' and donors'—by providing concessions and benefits that make everyone feel important but that don't do much to create lasting connections between the donors and the cause. In other words, they take the idea of supporting an organization that seeks to serve the greater good and make it all about individual egos. Remedy this trap by following a few simple rules suggested in this document.

Blog **- Help Your Board Understand The Importance Of Millennial Engagement (May 2010)**

Is your board not interested in focusing on younger generations? Here are some simple tips

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.

Template **- Board Network Interview Questions**

A series of questions to ask board members to discover potential constituents and prospective donors for the organization.

Template **- Essential Fundraising Tasks Checklist**

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

Template **- 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.

Webinar **- Support the Board with Fundraising-You Will Be Glad You Did**

If we want our volunteers, especially board members, to be full partners in fundraising, what should we do to support them? What makes them most effective? How can you help them focus on the important stuff? Find out the ways to optimize your board for maximum results.

Webinar **- Board Members...Tired of Talking About Management In Meetings?**

In this webinar, learn the value of running an effective and efficient meeting to make the most of the board's time by comparing a traditional meeting format to that of a Consent Agenda. Having a clear understanding of how to use a Consent Agenda will produce initiatives the board will own resulting in better attendance.

Webinar **- Enabling Board Members to be Dynamic Fundraisers**

There are key things to be doing BEFORE you start active campaign planning; this session helps you think ahead and prepare the way!

Webinar **- Board Structure Hurt or Help?**

Effective strategies to create a highly functioning governing board.

Board Grid Overview

Template **- Board Member Giving Grid**

Shows annual fund gifts by board members over time.

Template **- 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

Blog **- Oops…I Just Forgot To Mention Fundraising. (December 2009)**

Let me begin by saying that it is never a good idea to lie to your board members...especially during the recruitment process.

Blog **- Struggling With Getting The Board To Step Up? (August 2008)**

Board members fulfilling service expectations are contingent on you letting them know what is expected of them before they commit.

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.

Template **- Board Engagement Plan**

An excellent way to get board members to organize their fundraising activity is to provide a way for them to keep track of their list of prospects and manage several at a time. This document serves as a way to keep the prospect list fresh and in one place and offers a way for board members to manage their interactions with their prospects as well as keep important notes.

Template **- Board Member Responsibilities**

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

Template **- 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!

Board Fundraising Events

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.

Template **- Board Private Events for ABC Foundation**

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

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

Template **- Conflict of Interest Policy**

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

Capital Campaign

The Capital Campaign category contains the following sections: Campaign Budgets; Campaign Case; Campaign Manual; Communications; Gift Tables; Overview; Peer Screening; Performing the Ask; Pledge Forms; Prospect Research; and Stewardship.

Campaign Budgets

Guidance **- Capital Campaign Budgets**

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

Template **- Campaign Expense Categories**

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

Campaign Case

Guidance **- What Is A Case Statement?**

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

Template **– Format (1): 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.

Template **– Format (2): Case For Support**

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

Campaign Manual

Guidance **- What Is A Campaign Manual?**

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

Communications

Guidance **- Developing A Campaign Communications Plan**

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

Template **- 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.

Gift Tables

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.

Template **- Gift Table Example-$5M**

Example gift table for a $5 million dollar campaign

Template **- 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.

Overview

Blog **- Belief In Mission—Still The Key (May 2009)**

Giving is down in 2008 on all fronts. This is no time to think about a campaign

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.

Template **- 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.

Template **- Peer Screening Questions**

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

Template **- 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.

Pledge Forms

Guidance **– Pledge Form**

This guidance document ensures that your campaign pledge forms are useful and effective.

Template **- Pledge Form**

Sample pledge form for a capital campaign gift.

Prospect Research

Guidance **– Individual Prospect Research**

This guidance document provides an overview to consider who the best prospects might be for a capital campaign.

Guidance **- What is a Feasibility Study?**

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

Stewardship

Guidance **- The Essentials of Good Stewardship**

This guidance document outlines what good campaign stewardship means beyond the gift itself.

Corporations

The Corporations category contains the following sections: Agreements; Corporations Overview; Corporate Proposals; Corporate Sponsorship Grid; Prospect Research; and Stewardship.

Agreements

Template **- 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.

Template **- Corporate Sponsorship Agreement**

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

Corporations Overview

Achieve White Paper **- Capital Campaign Readiness**

This article describes ways to measure an organizations readiness for a capital campaign.

Template **- Abbreviated Corporate Sponsorship Proposal**

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

Template **- 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.

Guidance **- 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.

Webinar **- Approaching Corporations-What Works?**

Is it better to go for a corporate foundation grant, cause marketing, or corporate sponsorship? This webinar defines the elements of each and provide the background needed before approaching corporations for support.

Corporate Proposals

Guidance **- Writing a Winning Sponsorship Proposal to a Corporation**

This guidance document describes the components of common corporate proposal.

Template **- 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.

Guidance **- 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.

Stewardship

Guidance **- Stewarding Relationships With Corporate Event Sponsors**

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

Template **- 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.

Webinar - Obtaining Corporate Sponsors

Is it better to go for a corporate foundation grant, cause marketing or corporate sponsorship? This webinar defines the elements of each and provide the background needed before approaching corporations for support.

Development Department

The Development Department category contains the following sections: Case Statement; Development Function Review (Audit); Development Overview; Development Plans; Gift Acceptance Forms/Pledge; Job Description; Leadership; and Prospect Management.

Case Statement

Template **- Case For Support**

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

Template **- Case Outline**

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

Development Function Review (Audit)

Template **- 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.

Webinar **- Development Director or Not?**

Is your organization facing this critical question: Should we hire a development director or not? In this webinar, Achieve debuts a series of resources directed at this critical question in an organization's growth. Learn the pros and cons of having someone in this position, their role and responsibilities and if a development director-or not-is right for your organization.

Development Overview

Achieve White Paper **- Volunteers & Organizations…Getting Organized and Building Lasting Relationships**

This article talks about how an organization can effectively use volunteers to raise funds and obtain donors. It also talks about the difference between stewardship and cultivation; and, how an organization can use both processes.

Achieve White Paper **- Making Gifts Possible**

This article talks about the importance and the influence all staff members and departments have on donors. The development department is not the only resource an organization utilizes to cultivate donors.

Blog **- Partner—What It Really Means To Donors (April 2010)**

The word partner means so many different things to so many organizations. Consider how your donor thinks about partners.

Blog **- I Agree With The IRS! (March 2009)**

A New Form for New Thinking...

Template **- Contact Log By Type**

Effectively track the development activity for board and staff.

Webinar **- Understanding the New 990**

The changes in the 990 have many nonprofit scratching their heads. Learn about what has changed with the newest version of the IRS 990 Form. This webinar explains why the IRS has made changes, instructs you with how to complete the new form, and what to expect from those who are assisting your organization complete the form.

Development Plans

Achieve White Paper **- You Want Me To Think Before I Act?**

This article talks about development plans and how to construct one for an organizations. Specifically a development plan should: look for past trends in fundraising, focus on strategy, exclude logistics, get active, involve the board, and not waste time.

Blog **- Thinking About Moving Your Direct Mail to E-mail? Consider A Few Things First (July 2010)**

There are many organizations looking to divert their fundraising communication and solicitations from print to email. Cost savings, better tracking, and timeliness are all great reasons to potentially switch to electronic (email or web) fundraising practices. The big question you are probably wondering is - how will your donor base respond?

Blog **- Fundraising Is Evolving—How To Stay Sane (June 2010)**

The field of fundraising is evolving. How do you stay on top of everything?

Blog **- Beware Of The Dreaded "Donor Engagement Gap." (March 2010)**

Imagine that your favorite TV show breaks for commercial, and you hear: Do you stutter when donors ask, "How can I get more involved?" Does your blood pressure climb when they say, "I want to be more engaged in your mission." Do your palms sweat when a donor ends a volunteer experience by saying, "What's next?"

Blog **- Time to Innovate and Instigate (January 2010)**

Development professionals need time to innovate and instigate. Are your expectations too high?

Blog **- How Do I Get More Involved? A Donor Engagement System (December 2009)**

Donors are always looking for more ways to get involved. Develop a system of donor engagement.

Blog **- Considering Direct Mail? Then Consider These Helpful Hints. (December 2009)**

A successful direct mail program can be the cornerstone of a comprehensive development process.

Guidance **- How To Create A Development Plan**

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

Template **- Development Plan Outline**

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

Template **- Solicitation Calendar**

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

Gift Acceptance Forms/Pledge

Guidance **- Gift Acceptance Policies The Basics**

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

Template **- Donor Intent Form**

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

Template **- Gift Acceptance Policy**

Sample gift acceptance policy to use as a guide.

Template **- Sample Gift Acceptance Policy – 2**

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

Job Description

Template **- CEO Job Description**

This provides the components of a typical CEO job description.

Template **- Development Associate Job Description**

A sample job description for a mid-level development department associate employee.

Template **- Director of Development - Position Description**

A job description for a development director including roles and responsibilities for leading a development department.

Template **- Donor Database and Events Coordinator Job Description**

A sample job description for an entry-level development department position.

Template **- Intern Job Description**

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

Leadership

Achieve White Paper **- New Leadership Skills for Today's Environment**

New leadership skills are needed to navigate the economic pressures facing organizations. Specifically the article mentions the following attributes of a leader: proactivity, focus, presence, resilience, self-awareness, ambition, and clarity of vision.

Achieve White Paper **- Do You Have What it takes to be the CEO?**

This article describes successful nonprofit CEO practices.

Big Idea Series **- Making gifts possible (June 2009)**

Herein is an observer's account of one donor's steps from ignorance of an organization's work to becoming their largest supporter, and how the process was one of collaborative teamwork by the organization to cultivate a trusting relationship.

Big Idea Series **- Do you have what it takes to be a CEO? (September 2009)**

If you have ever considered pursuing the chief executive role within an organization, consider these observations and experiences from Achieve CEO, Derrick Feldmann.

Big Idea Series **- Capital: More than just dollars (November 2009)**

For leaders to successful achieve growth and stability for their organization, it is important to beyond money as the most important resource. This document discusses three other forms of 'capital:' social, leadership, and internal, as essential sources of value to an organization.

Big Idea Series **- Are you pursuing a check or a relationship (December 2009)**

Suppose your donors were down to their last dollar, would they support your mission or just order something from the deli? Answering this question may illuminate what kind of relationship you have with your donors. This document discusses the phenomenon of "transaction-based giving" and its inability to sustain donor engagement.

Big Idea Series **- The Path of Least Resistance (January 2010)**

When faced with a dilemma, it is common for people to choose the "path of least resistance," opting for the choice that is believed easier. Consider a nonprofit ED who shies from discussions about matters really affecting the organization, involves himself only in program-related activities because he is uncomfortable with fundraising, or retains ineffective staff members simply because they have been with the organization for a long time. This document challenges you reflect on your role as a leader and your position within the sphere of public service.

Big Idea Series **- Donor Community vs. Donor Network: Don't Confuse the Two (February 2010)**

The phrases "donor network" and "donor community" are commonly uttered within fundraising discussions, yet little attention is given to the fact that these groups possess distinct features and characteristics. Understanding the differences between these groups will help you develop smarter fundraising strategies.

Blog **- Nonprofit Influencers: Not Your Typical Volunteer (May 2010)**

What are nonprofit influencers and how do you work with them?

Blog **- Momentum—Donors Need To Experience It. (December 2009)**

Donors Need to Understand the Direction. Create Momentum for the Organization in Order to Realize True Donor Potential.

Blog **- Fight The Urge! (September 2009)**

Being the leader of a nonprofit is difficult for reasons you may not realize.

Blog **- Leaking Roof or Convenient Excuse? (August 2009)**

Just what is the highest priority?

Webinar **- Considered for Advancement?**

You work hard and you are aiming higher, but what will make you a person others say is ready to advance and take on new assignments?

Webinar **- Managing Forms of Capital**

Mention “capital” and it often conjures up images of financial capital, yet this is only one of a number of types of capital necessary for running an effective organization. Learn about the different types of capital and how the most successful organizations maximize their use of all of the diverse types of capital at their disposal.

Webinar **- Donor Community vs. Donor Networks**

Learn the difference between donor communities and donor networks to garner the support you need. This session will help you craft strategies for donor communities and donor networks.

Webinar **- Who Does What? Defining the Roles of Staff and Board in Fundraising**

Feel like you’re talking in circles with your board? Break the cycle and learn how to get the most out of the human capital you have in your board and staff.

Webinar **- Engaging the CEO in Fundraising**

Feel like your fundraising ship is sinking? Make sure you’re not the only one onboard, but that your CEO and board are right there with you! Conversely, if you’re just experiencing some rough waters, then learn how to develop a sound strategy for getting the CEO and board to make fundraising a priority.

<u>Webinar</u> **- The Best Volunteers: How to Recruit Your Leadership Team**

Volunteers are essential for fulfilling your mission, for fundraising and so many other things; what should you look for and how can you engage them in your work? This webinar spotlights how to secure volunteers for leadership positions and fundraising.

<u>Webinar</u> **- Don't Get Lost in the Shuffle: Thriving as Part of an Association**

Feel like you're not getting the attention you deserve or the resources you need from your association to ensure your success? Find out how to utilize the resources of the national organization, open conversations with your affiliate peers to convey your thoughts to the national office and what it takes to break away from the pack of your peer affiliates to become the shining star of the organization.

<u>Webinar</u> **- Is Your Fundraising Glass Half Full or Half Empty?**

Most nonprofits are feeling the pull of the tough economy-but is your glass half full or half empty?. Learn what others don't know-how to plan your way through it! Everyone is tightening their belts but this webinar helps your organization find the silver lining in the clouded sky. Janice Gow Pettey focuses on organizational skills and leadership that will make a difference between 'half full' and 'half empty.' Make the difficult times work for your nonprofit.

Prospect Management

<u>Template</u> **- Prospect Tracking Tool Moves Management**

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

<u>Template</u> **- Prospect Worksheet**

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

<u>Template</u> **- Prospective Table Sponsors**

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

<u>Template</u> **- 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

The Foundations category contains the following sections: Common Grant Applications; Communications; Foundation Proposals; Foundation Overview; Letters of Inquiry; Logic Models; Performing the Ask; Proposal Budgets; Prospect Research; and Stewardship

Common Grant Applications

Template **- Common Grant Application Form**

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

Template **- Common Grant Application Sample**

Use as a framework as you prepare your proposal.

Communications

Blog **- What Your Foundation Grant Officer Wants You To Know. (November 2009)**

While you may be aware of many of these foundation realities, the truth is that many organizations fail to maximize the opportunities they present to us.

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.

Template **- 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.

Foundation Proposals

Template **- 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.

Template **- Proposal Request – Basic**

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

Template **- Proposal Sample Narrative**

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

Template **- Sample Full Proposal For Project Support**

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

Webinar **- Grantsmanship from Both Sides of the Table**

This webinar focuses on strengthening the ability of nonprofit organizations to develop the most successful grant applications. Attention is given to what funders most need from the nonprofits that apply to them for funding, and how applicants can best respond to those needs. The webinar further discuss this from the point of view of both public and private funders.

Foundations Overview

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.

Template **- Foundation Support Tracker**

Helps track progress with foundation proposals and inquiries.

Webinar **- Achieve Grants Overview**

Overview of the Achieve grants process, learning about the projects we are interested in supporting and how you can apply.

Webinar **- Breaking Down Foundation Myths**

This webinar discusses the different myths about foundation giving as well as the best practices when working with foundations to support the needs of your organization.

Letters of Inquiry

Template **- Basic Short Form Letter of Inquiry**

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

Template **- Basic Short Form Letter of Inquiry**

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

Template **- Letter Of Inquiry to Foundation for Support**

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

Template **- Letter Of Inquiry With Cover Letter**

A cover letter will make you letter of inquiry stronger.

Logic Models

Template - Logic Model Guideline

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

Template **- Copy Of ABC Foundation Project Budget**

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

Template **- 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.

Template **- Project Budget with In-Kind Support Listed**

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

Template **- Sample Project Budget for Foundation**

Sample project budget for foundation proposal.

Prospect Research

Template **- 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.

Millennial Donors

The following resources spotlight the growing donor class known as millennials (age 20-40).

Achieve White Paper **- Engaging Millennial Donors**

This article talks about the unique needs of millennial donors and how to successfully engage them in donor activity. The article specifically touches upon: personal connection to the mission, networking, social opportunities, and the ease to plug in and be involved with the organization.

Big Idea Series **- Why Should I Spend Time Talking To Young Donors? (May 2009)**

Fundraising is an activity devoted to harnessing trusting relationships that nurture an organization's mission over long period of time. Achieving such a goal often requires diversity within your "investment" portfolio. This document provides findings that can help you best engage the young donor demographic.

Big Idea Series **- Get Specific to Engage Next Generation Donors (March 2010)**

If you intend to attract and cultivate the next generation of donors for your organization, you need to make it explicitly clear how you plan to use their resources before acquiring them. Failure to provide such clarity will result in lost opportunities that will be found elsewhere. This document provides newly released data on millennial donors (age 22-40) along with suggestions in response to the evidence.

Interview **- Kyle Lacy: Capturing Engagement from the Next Generation**

From June 2010: Kyle Lacy, CEO of Brandswag, shares his views on millennial engagement and social media.

Interview **- Carol Phillips: Millennial Marketing and Nonprofits**

From August 2010: Carol Phillips, Founder and President of Brand Amplitude, comments on marketing and branding concepts and their relationships millennials.

Interview **– Katya Andresen: Communicating for the Greater Good**

From July 2010: Katya Andresen, COO of Network for Good, discusses marketing, millennial engagement, social media, and fundraising in a digital age.

Webinar **- Enhancing Donor Engagement Through Social Media**

Twitter, Facebook, and blogs…they're all the rage right now! You hear those amazing stories of organizations raising tons of cash through social media, but are those real fundraising strategies, flukes, or just urban tales? Learn how to ensure you have a meaningful presence in the social media world, while maintaining a sense of realistic outcomes that you should expect.

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Webinar **- Engaging Millennial Donors**

How many millennial donors does your organization have? Learn why it's important to spend time with young donors. After all, they won't be young forever!

Online Fundraising

The following documents contain relevant informationon fundraising and online communication.

Big Idea Series **- Online Contests: What Do Your Donors Think? (May 2010)**

Online fundraising contests have generated attention of late for their ability to yield large sums of money, public recognition, and associations with large corporations. However, participation in such contests may threaten existing donor relationships. It, therefore, becomes essential to consider how these contests might affect an organization's current donors, and what becomes of the donors who come onboard through the contest channel. The following document provides core questions you should ask prior to entering into online fundraising contests.

Big Idea Series **- Facebook Fundraising ROI: Focus on Stewardship (June 2010)**

Those who argue against social media cite the low numbers in support received from appeals. Those who argue for the use of applications such as Facebook point to the outreach and relationships they can generate. Both sides of this debate need to step back and put things into perspective. Before making a decision on your social media investment, consider the document's following suggestions.

Big Idea Series **- Focus on Impact, Not Transactions, for better Donation Pages (July 2010)**

Many nonprofits' web donation and support pages focus first on completing the transaction, and second – if at all – on continuing the story. That's a big mistake. The donation page offers an opportunity to share your the story of need, impact of gifts, profiles of donors and more. Consider the following tips suggested within the document when designing your donation page.

Blog **- Tweetups: Raising Funds and Friends (August 2010)**

If your organization is already using Twitter, why not use Tweetups?

Blog **- Using Foursquare for Fundraising (July 2010)**

Helpful tips on using Foursquare for your organization's fundraising needs.

Blog **- Short vs. Long Email Communications: Which Is Best? (July 2010)**

Which type of email campaign best suits your organization?

Blog **- From Donate To What? The Evolving Donate Button On Nonprofit Websites (May 2010)**

What is the next iteration of the donate button on nonprofit websites?

Blog **- Three Simple Ways To Use Social Media For Donor Engagement. (March 2010)**

Navigating the social media landscape can be tough, but there are simple steps the organization can take to donor engagement and technology.

Blog **- Your special event and the internet (October 2008)**

Learn whether using the internet to advertise your special event is really worth it.

Guidance **- E-Solicitation And Beyond**

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

Template **– E-mail Solicitation**

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

Webinar **- Using Technology to Raise Money**

Today's development office looks nothing like it did 10 or 20 years ago. What should you have on your website and should your printed materials mirror the web? Learn basic and intermediary fundraising practices using technology and how to maximize their use for the greatest possible fundraising outcomes at your organization.

Webinar **- Cyberspace Solicitations**

Has the direct mail letter been replaced by electronic appeals? E-solicitations are much more than just emails today. This webinar discusses how to develop a strategy for connecting with your high-tech donors and cultivating their support to ensure that they're not a one-time donor.

Webinar **- Generating Support Through Exceptional Online Experiences**

Learn how to make your website work for your organization. Create an experience that tells your story and engages the public in your work. This webinar with MediaSauce focuses on the components of websites and social media that are critical for a powerful web presence and how to steward the donors you attract online to continue their support.

Strategic Planning

The following documents provide information about strategy development for organizations.

Achieve White Paper **- When to Hire a Consultant**

This article talks about the decision to hire a consultant, and the process an organizations go through to hire a consultant. The article includes sections on: understanding the consultant's job, deciding to use a consultant, choosing the consultant, assessing the candidates, formalizing the relationship, paying for services, working together, and sharing expectations.

Achieve White Paper **- Confusing Activity with Achievement**

This article differentiates between activity and achievement; and notes how these terms relate to the impact an organization makes.

Big Idea Series **- Avoiding The Highly Contagious "Special Events" Bug (August 2009)**

A board member once remarked that a dependence on events is like a cold: it's easy to catch, but difficult to get rid of. When event-based fundraising becomes focused on the detail of napkin color rather than how they reflect an important part of an organization's mission, it's time to reevaluate your events program. Consider this document and take fresh look at your event's program.

Big Idea Series **- Stop The Madness: We Can't Cut Anymore! (October 2009)**

Slashing a budget is an all too common reaction when resources are scarce, particularly in an economic recession. However, cutting expenses as the best solution to survival is short-sighted. This document discusses the concept of operational scarcity and poses core considerations when reevaluating an organization's direction.

Blog **- Is Your Nonprofit "Too Big To Fail?" (June 2010)**

Are there any nonprofit organizations that are too big to fail?

Blog **- "Are You Ready?" Common Donor Questions To Nonprofit Growth (March 2010)**

So many organizations get excited about growing their programs. But your donors may be thinking differently.

Blog **- An Early Christmas Gift: Property Taxes (December 2009)**

Nonprofit organizations in one Indiana County are receiving an early Christmas gift from their local taxing authority: property-tax bills.

Blog **- Strategic Planning…The Navigation System For Your Organization. (September 2008)**

When I was kid, we would go to the AAA to get a road map.

Blog **- Loss For Creativity? Let Your Donors Help You. (March 2010)**

Is there a loss for creativity in your organization? Consider donor engagement and input.

Blog **- Here as a Tale of Some Castaways. (September 2008)**

Remember the TV series Gilligan's Island? Being far away might not be a bad thing.

Blog **- Another RFP for Capacity Building (October 2008)**

I met with a colleague the other day and I got on my soap box again.

Blog **- Copy Others' Tactics Won't Always Pay-Off (August 2010)**

Value realistic expectations and adapt successful recipes to fit your organization and audience.

Guidance **- Defining Activity Tasks for Strategic Planning Objectives**

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

Template **- Strategic Plan Example**

An example of a three-year strategic plan for an organization.

Template **- Strategic Planning Outline**

A sample of a Strategic Plan Outline

Template **- Strategic Planning RFP**

A sample RFP for selecting a consultant to facilitate your strategic plan creation.

Webinar **- Analyzing Special Events: Considering the Attendee's Experience**

Are your donors tired of chicken dinners yet? Develop a strategy for fundraising events as a piece of your overall development program, and force yourself to document why you should have even one more event by putting yourself in the shoes of your attendees.

Webinar **- Growing to Meet the Needs of Your Mission**

Is your organization being pulled in the direction of growth? When have you stretched too far and placed the organization at risk in the name of growth? This webinar focuses on helping you determine growth potential and how to engage donors in the decisions.

Webinar **- Consultant or Not?**

Hear from Derrick Feldmann, Achieve CEO, and Dave Sternberg as they discuss the important decision to work with a consultant and how to prepare your organization.

Webinar **- Strategy: Defining the Vision**

So you've got a mission statement and strategic plan, but what's an organizational vision? Develop a meaningful vision that complements your strategic plan and mission statement to convey where you're headed and attract philanthropic support.

Webinar **- Measuring Your Impact…It Can Be Done**

Without data you are just another person with an opinion. Help your organization measure, manage and communicate RESULTS. Claudia Horn focuses on the fundamentals of creating and applying an outcomes-focused, case management information system. The goal of this webinar is to strengthen organizations' information management capabilities, to spur strategic thinking among leadership and to equip organizations to communicate more effectively what their donors care most about the impact they are making.

Other

The following documents are related to fundraising and nonprofit organizations, but do not necessarily fit into the above categories.

Blog **- All Those Gifts For Obama And McCain And What Is To Show? (August 2008)**

Gifts to political campaigns might have a good purpose but do they change lives?

Blog **- Nonprofit Overhead Comparison (September 2008)**

Like comparing and contrasting the candidates, we should do the same for charities.

Blog **- Fundraising And The Economy (October 2008)**

I have been asked numerous times in the last couple of weeks what do I think the impact of the economy will be on fundraising.

Blog **- The Time Is Now For Nonprofit Organizations (November 2008)**

It is the day of what many are calling the most pivotal election in our history...

Blog **- There Is A Message In The Message (December 2008)**

Beyond the doom and gloom lies a much more important story...

Blog **- Comfort Words (January 2009)**

Like certain foods that bring comfort so to can certain words...

Blog **- The Time Has Come To Do Nothing (February 2009)**

Enough. The right answer is for us to just sit and do, well, nothing...

Blog **- Are You Certain That Is New? (April 2009)**

Please put on a blindfold and think back. Your responses today may look similar to what you were told years before...

Blog **- Funny Thing Happened In L.A. (May 2009)**

It is all about the lens you see things through...

Blog **- Bad Economy…Even Worse Decision-Making (July 2009)**

We might be in a recession but let's not make equally bad decisions in response!

Blog **- Advocacy: Dying On Its Own Or Is The Economy Killing It? (December 2009)**

Advocacy has been an important part of our past, but it does not pay the bills; and now with the economy in its current state, many of our “advocacy memberships” are not being renewed.

Blog **- Groupthink: One Of The Deadly Sins Of Nonprofits? (January 2010)**

On January 28, 1986, Americans were shocked as they watched the Shuttle Challenger explode only 73 seconds after launch. That grief turned to anger when.

Blog **- How Well Do You Know The Organization You Support? (February 2010)**

Do you know the organization's leadership? What about their budget size? Do you know where your money goes? You might be surprised about the relationship of knowledge and how much you give.

Blog **- What Is Your Nonprofit’s Personality? (February 2010)**

When you support an organization with time or money, how do they tell you “thanks?” How does the staff act with you when you bump into them at restaurant or at the store?

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