Fundraising Toolkit

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Background

Carson Valley Trails Association engaged CAPITAL VENTURE™, through the Alliance for Nevada Nonprofits, to conduct training program for its board members and other volunteers on February 15, 2012. This training was conducted by Linda Lysakowski, ACFRE. President/CEO.

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Company Profile

- CAPITAL VENTURE™ was established in May 1993 and is incorporated in the Commonwealth of Pennsylvania as Cornerstone Consulting, Inc. d/b/a CAPITAL VENTURE ™.
- CAPITAL VENTURE℠ has offices in Boulder City, Nevada.
- The mission of CAPITAL VENTURE℠ is to provide fundraising counsel, specializing in innovative training and consulting services for nonprofit organizations. CAPITAL VENTURE℠ strives to advance the cause of philanthropy by providing professional, ethical, and competitively priced fundraising counsel.

Services of CAPITAL VENTURE℠ include:

- Development audits and plans
- Board development
- Capital and endowment campaigns
- Feasibility/planning studies
- Prospect research and proposal writing
- Development of annual fund campaigns including corporate appeals
- Development of major gift strategies
- Staff and board training
- Public relations consulting
- Planned giving consulting

CAPITAL VENTURE℠ offers personalized services to meet your needs. We are dedicated to working with your staff, board, and volunteers each step of the way. All CAPITAL VENTURE℠ consultants are active members of the Association of Fundraising Professionals (AFP), and adhere to the AFP Code of Ethical Principles and Standards of Professional Practice.

Linda Lysakowski, ACFRE
President/CEO

Linda is one of fewer than one hundred professionals worldwide to hold the Advanced Certified Fund Raising Executive designation. In her seventeen years as a philanthropic consultant, she has managed capital campaigns; helped dozens of nonprofit organizations achieve their development goals, and has trained more than 22,000 professionals in Mexico, Canada, Egypt and most of the fifty United States, in all aspects of development.

As a graduate of AFP's Faculty Training Academy, Linda is a Master Trainer and has served on the board of the AFP Foundation for Philanthropy. She has received two AFP research grants. She is also a prolific writer and is currently working on another book. Linda has received the Outstanding Fundraising Executive award from both the Eastern PA and the Las Vegas chapters of AFP (Association of Fundraising Professionals) and in 2006 was recognized internationally in Atlanta, GA with the Barbara Marion Award for Outstanding Service to AFP.

Current Professional Affiliations & Volunteer Leadership

- Board Member: Women's Ordination Conference
- Board Member: AFP Foundation for Philanthropy, AFP International
- Member: Professional Advancement Division, AFP International
- Editor, We Review Panel, CharityChannel
- President; Sierra (NV) Chapter of Association of Fundraising Professionals (AFP)
- Advisory Committee, GiftWorks Software
- Member Stewardship Committee, RCIA catechist, lector and Extraordinary Minister: St Andrew Catholic Community, Boulder City, NV

Selected Training/Public Speaking

- International AFP conference, the Hemispheric Conference in Mexico, and dozens of regional and local AFP chapters throughout North America.
- Numerous state wide associations including Pennsylvania Association of Nonprofit Organizations (PANO), Ohio Association of Nonprofit Organizations (OANO), Utah Nonprofit Association (UNA) and Nonprofit Management Centers in Nashville, TN and Wichita Falls, TX.
- National and international conferences including Variety International, Ronald McDonald House Charities, Junior Achievement, US Tennis Association, National CASA, and the National Community Service Conference by Points of Light Foundation.
- Educational conferences sponsored by Council for the Advancement and Support of Education (CASE), the Association of Healthcare Philanthropy (AHP), Association of Lutheran Development Officers (ALDE) and Club Managers Association (CMA) and Association for the Advancement of Collegiate Schools of Business (AACSB)
- Numerous audioconferences and webinars for Charity Channel, The Philanthropy Journal, Affinity Seminars, National Coalition for Homeless Veterans, National Community Action Programs, and AFP

Publications

Full Length Books:

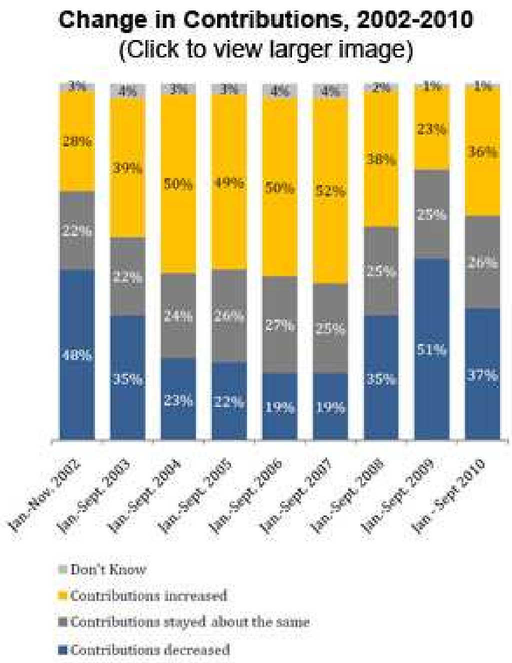
Recruiting and Training Fundraising Volunteers; *The Development Plan; Fundraising as a Career: What, Are You Crazy?; Capital Campaigns: Everything You NEED to Know; Raise More Money from Your Business Community;* contributing author—*The Fundraising Feasibility Study—It's Not About the Money,*; Co-author—*The Essential Nonprofit Fundraising Handbook;* Co-editor—*YOU and Your Nonprofit*.

AFP Ready Reference Books:

Establishing Your Development Office, translated into Spanish and French, *Getting Ready for a Capital Campaign*, translated into Spanish, *Building an Effective Board of Directors*, translated into Spanish.

Numerous other Publications including *International Journal of Nonprofit and Voluntary Sector Marketing, Contributions, Advancing Philanthropy, Opera America, Associations Now, California Grants Guide,* CASE *Currents, Major Gifts Report, Who Cares, Grant Station, New Directions in Philanthropy,* PANO *Keynotes, The Friend Raiser,* and more.

2010 Fundraising Survey Results: The Worst May Be Over



In October 2010, GuideStar joined forces with the National Center for Charitable Statistics (NCCS), the Association of Fundraising Professionals (AFP), the Center on Philanthropy at Indiana University, Blackbaud, and the Foundation Center to create the National Research Collaborative and conduct an end-of-year fundraising survey. Representatives of 2,356 public charities and 163 private foundations took the survey online between October 19 and November 3, 2010. The results are encouraging: The proportion of participants reporting decreased contributions dropped 14 percent, from 51 percent in October 2009 to 37 percent in October 2010. The percentage who said contributions had increased grew 13 percent, from 23 percent in October 2009 to 36 percent in October 2010. These figures *may* herald the beginning of an economic recovery in the nonprofit sector, although only time will tell if the trend will continue. For the first time in two years, however, there's cause for cautious optimism about the sector and the economy.

Other highlights from the 2010 fundraising survey:

- Larger organizations, those with annual expenses of $1 million or greater, were more likely to report increased contributions.
- As has been true in previous years, respondents who reported decreased contributions cited "Fewer individuals gave" and "Gifts from individuals were smaller" as the primary reasons for the decline.
- For the eighth consecutive year, a majority (68 percent) of participants reported increased demand for their organizations' services.
- Half of the organizations represented in the survey receive the bulk of contributions during the last quarter of the year, the period known as the giving season. Of this number, 36 percent predict that contributions received during the fourth quarter of 2010 will

exceed those from the last quarter of 2009, 43 percent expect end-of-year contributions to be about the same as last year, and 22 percent anticipate that end-of-year contributions will be lower.

- Nearly half (47 percent) of participants expect their organizations' budgets to increase next year.

The survey report contains additional analysis, including breakdowns by mission category, and numerous charts and graphs.

Psychology of Philanthropy - (Why People Give)

Donors give for the following reasons:

1. Moral obligation to help
2. Personal satisfaction of helping others
3. To remove guilt for not giving
4. To maintain or improve social status, prestige, respect, or acclaim
5. In response to peer pressure
6. Out of compassion or empathy
7. Personal identification with cause or benefactor
8. Self-interest
9. Religious influence
10. The need to be needed
11. Substitution for active participation in good works
12. Support for the mission and purpose of the organization
13. Personal relationship with the organization
14. Appreciation for the organization's mission
15. To feel the "glow of emotional virtue"
16. As evidence of one's success and ability to give
17. To express anger
18. To express love
19. To express hope (for a cure)
20. To end fear (of fire, sickness, hell, etc.)
21. Out of the cause's appeal (cause celebre)
22. To be remembered
23. To gain recognition or attention
24. To join a worthwhile group, sense of belonging
25. To preserve the species
26. To gain immortality
27. For psychic self-satisfaction
28. For vicarious self-actualization
29. Giving to oneself (benefactor seen as an extension of one's self)
30. Desire to provide public goods one may use themselves
31. Desire to provide public goods used by others
32. Desire to provide public goods so others do not try to use one's own goods
33. Satisfaction derived from the goods themselves
34. Satisfaction derived for bringing about the result
35. To fulfill a condition for employment
36. In response to leadership from respected peers
37. Desire to be an agent for "public good"
38. Satisfaction received from seeing others satisfied
39. Tax benefits

Assessing Your Organization's Philanthropic Profile

1. Does the organization have a Development Office?
2. Do experienced professionals staff the Development Office?
3. Does the development budget include money for professional development (membership in professional organizations, conferences and workshops, books and periodicals, etc. for the development staff?
4. Has the organization allocated a budget for a donor software system to manage fundraising activities?
5. Do the organization's staff members understand the importance of the development function? Do staff members support the development office's efforts?
6. Does the organization seek to hire development professionals that are certified (CFRE or ACFRE, FAHP, etc.) or assist current staff in obtaining credentials?
7. Does the Chief Development Officer attend board meetings?
8. Is the board committed to development (do they give and get money for the organization)?
9. Is there a Development Committee on the Board?
10. Does a development officer staff this committee?
11. Is there clerical support for the Chief Development Officer?
12. Does the development staff act and look professional?
13. Is the Development Office in a prominent location and does it have a professional appearance?
14. Does the organization support the Donor Bill of Rights?
15. Is the organization aware of and supportive of the AFP Code of Ethical Standards?
16. Does the organization understand the importance of donor centered fundraising?
17. Does the organization understand that it takes time to establish a development program, and that building relationships with donors is the key role of the development office?
18. Is the organization committed to work with consultants when it is appropriate to do so, and not expect staff to manage major efforts such as a capital campaign?
19. Is the CEO involved in fundraising?
20. Are there volunteers involved in fundraising?

Give your organization 5 points for each "Yes" answer! And then score yourself:

90 points or more: You have a strong philanthropic profile

70-89 points: You have a little room for improvement

50-69 points: You should take a serious look at whether or not your organization is committed to philanthropy

Less than 50 points: You need some reorganization of your leadership and board.

The Importance of the Case
Linda Lysakowski, ACFRE

Sometimes development professionals only think about the importance of having a case for support when they are preparing to launch a capital campaign. However, every organization needs a case for support for all of its fundraising activities. The case has been defined by some as *"the reasons why an organization both needs and merits philanthropic support….,"* (AFP Fundraising Dictionary); *….a clear, compelling statement of all the reasons why anyone should consider making contribution….* (Harold J. Seymour) and *"… an internal database …of information that will support the preparation of various documents and publications…"* (Henry A Rosso). The case is all of this and more.

Organizations need to develop their case for support first, before designing a brochure, developing a website, preparing grant proposals, developing speeches, PowerPoint presentations, DVDs and any other material used in its fundraising activities. The reason for having the case in place first is that it is crucial to present a unified message and a consistent look and feel in all the organization's fundraising materials. Too many times someone in the organization decides that it needs a brochure, a website, or video and someone heads off to develop that material, while other individuals are preparing grant proposals and fundraising appeal letters, and still others may be out making presentations to groups and individuals. If these people are not a working from the same source document, the case for support, the messages they deliver will be inconsistent and sometimes even contradictory.

The steps to developing a case are:

- Develop the organizational case for support
- Develop individual case statements for various fundraising activities
- Test the preliminary case statements
- Prepare final case statements
- Translate final case statements into fundraising materials.

In other words, development of the materials is the last step, not the first!

What is the Content of the Case?

The case should answer these questions:

- Who is the organization and what does it do? *(mission statement)*
- Why does the organization exist?
- What is distinctive about the organization?
- What is it the organization plans to accomplish? *(vision statement)*
- How will the fundraising appeal or campaign help accomplish this mission?
- How can the donor become involved?
- What's in it for the donor?

The case should contain the organization's mission and vision, both of which are important to motivate the donor to become involved. A history which shows the organization's success will help donors understand that the organization has a track record of successfully implementing programs. An outline of the programs and services for which funds are being solicited is important. It is also critical to show donors who the people are that are involved in the organization, both staff and board members. This will help build credibility for the organization. It will also be crucial to demonstrate a compelling need for funds; however the difference between being compelling and looking desperate is a fine line that the case cannot cross. Donors will not support an organization whose case sounds like a desperate appeal for funds to keep the organization afloat. Donors, instead, want to invest in a winning cause, an organization that has support from other sources, and one that shows it is filling a need in the *community*, not one that stress the *organization's* needs.

However it is critical to outline the costs of the programs you are trying to fund and provide solid financial information about your sources of funding and how the donors' contributions will help you achieve the goals presented in the case. The case also needs to provide options for donors to become involved. Outright gifts, pledges, gifts in kind, matching gifts, group gifts, named gifts, group gifts, and planned gifts are all options that should be described to for the donor.

Above all, the case needs to present both emotional and rational reasons for the donor to contribute. Emotion usually draws the reader into the case, but before they write out a check, most donors will want to analyze the rational reason to give.

Who Prepares the Case?

Generally the chief development officer will prepare the case for support, although often a consultant may be brought in to accomplish this task, particularly if the case is for a capital campaign. Sometimes public relations staff may be involved in the final product, especially in preparing the final fundraising materials from the case. Whoever is charged with developing the case, however, must be someone who understands the need for and the uses of the case, has good knowledge of the organization and its constituents, and must understand basic fundraising principles.

The case should always be tested before the final materials are prepared. In the case of a capital campaign, the preliminary case for support is usually tested through the process of the planning (or feasibility) study. If the case is for more general use, other ways to test the case may be by meeting individually with donors to ask their opinions, holding a focus group of donors, or posting the case on a section of the website open only to invited guests whose opinion is valued by the organization. Often the case may need adjustment after it is tested in order to assure that it is compelling to potential donors.

Translating the Case into Fundraising Materials

Remember that the case serves as the source document for all fundraising materials and that although the message is consistent and uniform, the way it is translated may vary greatly for different audiences. Foundation or government grant proposals may, for example, require almost the full case be included in the proposal. Corporate foundations and business donors may expect a greatly abbreviated version of the case stated in the form of a fact sheet or a simple letter. Board, staff and other "insiders" will not expect a glitzy brochure, website readers will look for graphics and an easy way to contribute. Current donors may not need as much emphasis on current programs if they are familiar with the organization, whereas new donor may need more information.

Before translating the case into written or electronic materials, it is crucial to do a stakeholder analysis and determine what materials will appeal to each constituency. Also various types of organizations will have different looks expected by their constituents. In general a small human service may turn off donors if these donors feel the materials are too "glitzy" (and are therefore perceived as too expensive). On the other hand a university, major health center, or museum may have donors who expect very sophisticated materials. In any case, the materials should be professionally done and presented in a way that is consistent with the organization's image.

Questionnaire/Checklist for Case Statement Evaluation

Look for the feedback in the following area:

- ❑ Does it elicit emotional as well as rational “reasons” to give?
- ❑ Does it tell your potential donors how their gift will make a difference?
- ❑ Does it evoke a sense of the history and long-term importance of your organization and its work?
- ❑ Does it offer proof that your plan will work?
- ❑ Are the benefits to the donor clearly stated?
- ❑ If you include graphs or charts, are they striking?
- ❑ Is it concise?
- ❑ Is it reader oriented rather than organization oriented?
- ❑ Does it emphasize “opportunity” for the donor rather than “need” of the organization?
- ❑ Is the information presented in a logical order?
- ❑ Is it readable with short sentences and paragraphs?
- ❑ Is the typeface appropriate to your organization’s appeal?
- ❑ Is there enough blank space to make it easy to read?
- ❑ Is the type large enough for reading by older prospects?
- ❑ Is the cover “striking?”
- ❑ Is the paper stock attractive without looking expensive?
- ❑ If you use photographs, are they effective and cropped to maximize their impact? (Photos should not include more than 2-3 people. Large group shots lose dramatic impact)

CVTA

Corporate Research Form

Name:

Address:

State: Zip+4

Phone: Fax:

Email: Website:

Contact Person:

Management/Directors:

History of Company:

Financial Information

Sales:

Net Income:

Employees:

Network:

Gifts to other Organizations:

Researcher:

Date:

Sources:

CVTA
Foundation Research Form

Name:

Address:

City: State: Zip+4:

Telephone: Fax:

Email: Website:

Management/Directors:

Areas of Interest:

Limitations:

Deadlines:

History:

Assets:

Total Grants:

Sample Grants to other Organizations:

Researcher:

Date:

Sources:

CVTA
Individual Research Form

Name: I.D. #

Address:

Home State: Zip +4

Telephone: Fax:

Business: Title

Address:

State: Zip +4

Telephone: Fax:

Educational History:

(Husband) (Wife)

(Husband) (Wife)

(Husband) (Wife)

(Husband) (Wife)

Personal Information:

Spouse:

Children:

Community Activities: Awards:

Corporate Affiliations: Other Memberships:

Career History:

Financial Information:

Salary (or Estimated):

Bonus or Additional Compensation:

Stock Holdings:

Dividends:

Retirement Income:

Property:

Inheritance:

Personal Foundation:

Giving Information:

Suggested Potential Contacts

Comments:

Researcher:

Date:

Sources:

Why You Need a Development Plan
Linda Lysakowski, ACFRE

How many times has a well-meaning board member or volunteer come to one of your board meetings and offered this sage advice—"We should do a (golf tournament, gala dinner dance, art auction, walkathon, etc., etc.,) because (Girl Scouts, Boy Scouts, the Hospital, etc., etc.) did one and raised $100,000?"

Before the meetings ends, the whole board or committee is caught up in "event fever' and has the invitations designed, the flowers ordered, and the T-shirt sponsors listed. And there you are, the new development officer, trying to meet grant deadlines, straighten out the donor database that is a mess, and organize the other events that your organization is currently conducting. So what do you do when the board is bitten by the "event bug?"

Another fatal mistake that organizations make is relying solely on a grant writer to raise all the money its needs for programs and operations. Given the fact that foundation grants only account for approximately 12% of all philanthropic giving in the United States, this approach seems equally as foolhardy as depending mainly on events to raise money for the organization. While both grants and events are important parts of a well-rounded development program, they should not be the *only* methods of fundraising used by nonprofits. So how does one handle these board suggestions, or (in some cases) mandates?

Often boards and volunteers do not realize that events and grant research can be costly, not only in terms of hard costs, but in "opportunity costs." In other words, what activities must you give up in order to focus your limited time on this proposed new activity? Your first reaction to the board or development committee that suggests either of these approaches should be, "Well, let's pull out our development plan and see if this event/grant is part of our plan; if not, what other activities must we drop in order to concentrate on this event/grant?" However, many organizations do not have a development plan to reference. If your organization is one of those, this is one good reason why you should have a development plan. Other reasons include the facts that the development plan provides:

- A way to measure success of your development activities.
- Assurance that your development activities provide a balanced approach—in other works "Don't put all your eggs in one basket."
- A way to determine the appropriate budget for the development office.
- Assurance that you have the human resources to implement the development activities that are planned.
- Timelines that allow the development office to best utilize staff time.

Organizations that have a development plan complete with timelines, areas of responsibility and budgets, will be more successful at keeping the staff, board and volunteers focused on the activities that are most cost effective and produce the best results.

What Should the Development Plan Include?

The development plan should start with an analysis of current development activities. Some questions to ask:

- What has been the history of this activity; have results increased or decreased over the years?
- What are the costs of this event, both hard cots, staff time, and opportunity costs?
- Do we have the human resources to manage this activity?
- Do we have the technology needed to manage this activity?
- What are the subsidiary benefits of this activity, i.e., if the activity is a cultivation or awareness raising events, should we continue the activity even if it does not raise money?
- How do current trends affect this activity?
- Are there ways we can increase the effectiveness of this activity?

Once the current activities have been analyzed, a decision should be made to keep them status quo, focus more time and energy on them, or drop them.

A solid development plan lists detailed goals for each activity. Goals do not always have to be monetary ones. For example, a goal might be to raise constituent participation by 5 percent this year, increase the size of the development committee by four people, to personally visit three major donors each month. Without specific goals, it will impossible to measure success of the plan next year. (We will discuss more on goal setting in a future article.)

A development plan also helps the development office justify its budget, provides measurement tools to be used in performance appraisals and provides donors with a sense of confidence in the organization. So, is there any reason your organization does not need a development plan?

Special Event Analysis

This tool can be used to evaluate current events or plan proposed events.

1. Rank each current or proposed event on the form. For example, if the event takes less than 25 staff hours, give it a 5.

2. Total up the points and rate the event:

35 — The Perfect Event (Don't we all wish!!)

30-34 — An excellent event, definitely worth keeping

25-29 — A good event probably worth keeping, but may need some minor changes

20-24 — A reasonably good event, may be worth keeping but should evaluate ways to improve

Less than 20 — May need to consider dropping this event or making serious changes

3. Please keep in mind that this evaluation is subjective. For example, if an event is raising $1 million dollars but requires a lot of staff and volunteer time, it is probably worth keeping despite a lower rating.

Special Event Activity Analysis

Event	Estimated Cost	Estimated Income	Estimated Profit $000s	Staff Hours Required	Volunteer Hours Required	New Names Acquired	Taps Large Donors	Builds Aware-ness	Risk Factor	Bonds Donors	Total	Ranking
				• <25=5 • 25-100=3 • 100>=1	• <100=5 • 100-200=3 • 200>=1	• 200+ =5 • 100-199=3 • 0-99=1	• 10+ =5 • 5-9=3 • 1-5=1	High=5 Med=3 Low=1	Low=5 Med=3 High=1	High=5 Med=3 Low=1		

The Role of Volunteers in Fundraising
Linda Lysakowski, ACFRE

A good volunteer base is important for the development office. Volunteers, like board members, are often the best source of identifying, cultivating and soliciting donors. Volunteers will be more likely to have the connections to businesses and individuals that have affluence than staff. A volunteer can approach the "ask" from the standpoint of not being a paid employee and should always tell the prospect about their own commitment to the organization. Volunteers can also be asked to help with specific areas of expertise, such as planned giving, public relations or strategic planning.

The Development Committee

The development committee is an important part of setting up the development program. This committee can help the organization plan and implement the development plan, as well as assist with opening doors to potential donors, and soliciting gifts. The development committee should invite several board members to serve, but should draw the majority of its members from outside the board. This will help the organization expand the fundraising efforts and cultivate potential board members. A development committee of 15 or more members will provide the skills and talents the organization needs. The committee should be divided into subcommittees such as a planned giving committee, event committees, annual fund committee, etc.

Recruiting Volunteers

Recruiting members of the development committee or other fundraising volunteers should follow the same process as board recruitment. Assess the needs and then find the appropriate persons to serve on this committee. Some potential members for the development committee might be past board members who want to stay involved in the organization's fundraising activities, those who have volunteered at events, donors, Chamber of Commerce members, and graduates of Leadership programs. The organization may also want to enlist the help of media and public relations people, development officers, and entrepreneurs. These are people who will have the skills and talents the organization needed on a development committee. Just as in recruiting board members, it will be important to have a position description with clear expectations before the organization recruits new committee members.

Volunteer Training

Volunteers and board members often need training in fundraising practice and techniques. Inviting key volunteers to AFP meetings, conferences and seminars is an inexpensive and effective way to help educate and train volunteers. Another option is to hire a consultant to help train the volunteers. If the budget is tight, ask another nonprofit organization if one of their key volunteers can assist with the training of volunteers.

Evaluating and Rewarding Volunteers

Just as the board resource committee evaluates the board's performance, the organization needs to evaluate the performance of the development committee and assess the needs on an ongoing basis. Developing a plan of action at the beginning of the year, the committee's success can be measured against the goals and objectives established in the plan. Did the committee members get actively involved with the plan? Did they help the organization identity donors? Did they contribute financially and solicit donors? Are there new ventures the organization is considering such as planned giving, that might require specialized skills on our committee? If so, look for people who can fill these special needs.

All volunteers need to be recognized. Special recognition can be given to volunteers in the newsletter and annual report. Invite the development committee to make a presentation to the board of directors on the work they have accomplished. Elevating effective development committee members to the board of directors is a good way to recognize their work and commitment.

How to Develop an Effective Board
Linda Lysakowski, ACFRE

For most nonprofit organizations, building an effective board is one of their greatest challenges. How do you find good board members, how do you get them to join the board, to become active, and to keep them involved once they are on the board?

Often, good board members are hard to find and sometimes it is difficult to assess their commitment to the organization until they are on the board, and it may be too late to avoid problems. Some boards flounder because there is no clear direction for them and they haven't bought into the vision of the club. Finding committed, dedicated board leadership is often a challenge. Board members are often reluctant to fundraise because they have not been recruited with that purpose in mind. Even if the organization originally intended for its board to be involved in fundraising, many times board recruiters are reluctant to use the "F" word for fear of scaring off potential board members. Many well-intentioned boards operate under the noble idea that, "once they get on our board and see the great work we are doing, they will want to go out and ask for money." Wrong! If they have not been told up front that fundraising is a part of their role, they will not embrace it later when you decide to "slip it into" their job description.

Recruiting the Right Way

One key concept to consider is *who* does the recruiting for new board members. Instead of a Nominating Committee that meets once a year to fill vacant seats, one recommended approach is to have a year round Board Resource Committee. (This committee can also be called the Governance Committee or the Committee on Directorship or any name with which your club feels comfortable) Whatever the title, the important things to remember about this committee are:

- It needs to meet year round;
- It should be chaired by the strongest person on the board;
- Its duties include doing an assessment of board performance, both the board as a whole and individual board members;
- It is responsible for developing or refining board position descriptions;
- It evaluates the needs of the board and develops a profile of the kinds of people that are needed to fill vacancies on the board;
- It works with the whole board to help find the right people to fill vacant board positions;
- It assures diversity on the board;
- It implements, along with senior staff members of the organization, board orientation;
- It is responsible for ongoing education of the board.

A Board Resource Committee, working thoughtfully, diligently and on an ongoing basis can make all the difference in the world between an effective, enthused, and inspired board and a lackadaisical board that does not understand its role in advancing the organization's mission and is reluctant to involve them in the fundraising process. One of the key roles of this important committee is to develop a board position description that includes a required financial contribution from each board member as well as the expectation that each board member be involved in the organization's fundraising efforts through attendance at events, planning development activities, and helping to identify, cultivate and solicit potential donors.

This committee is also responsible for assuring that the position descriptions are not glossed over during the recruitment process and to make sure that each potential board member understands the role of a board member. They must be expected to deal with potential board members that are obviously reluctant to accept their responsibility. It is better to turn away a prospective board member who is not willing to accept their full responsibilities, including that of fundraising, than to 'fill a seat with a warm body' just so the committee can say it has met its expectation to bring on a certain number of new board members each year. The reluctant prospective board member may instead be invited to serve on a committee or in some other volunteer position, other than being invited to serve as on the board.

So, where does one find the right board members and convince them to get involved on the board, and even to accept a leadership role? The best place to find good board members is to have active committees in your club. Serving on a committee gives both the volunteer and the club to "get to know each other." If the committee members are faithful in attending meetings, accepting responsibility, and delivering on promises, they will be likely to do the same when serving as board members. The committee process, in addition to helping your club gets things done, can often be a sort of refining process to sort out the wheat from the chaff and identify the volunteers who will be good board members.

Once you've built the board you want, how do you keep them? A few hints:

- Have a sufficient number of committee members to share the work load;
- Make sure meetings are productive;
- Assure that meetings start and end on time;
- Send agendas and committee reports in advance of the meeting;
- Have term limits and enforce them to avoid "perpetual" board members;
- Provide education and training for the board in areas in which they need to be knowledgeable.

Potential Donors/Volunteers for CVTA

Your Name:____

Category	Name	Potential Major Donor Y or N	Potential Board Member	Potential Volunteer
My accountant				
My car dealer				
My banker(s)				
My attorney				
Members of my professional association				
My insurance agent				
My doctor (s)				
My dentist (s)				
Members of a service club to which I belong				

Neighbors				
Relatives				
Clients/customers of mine				
Politicians I know				

People with whom I worship				
People with whom I work				
People with whom I went to school				

Parents of children with whom my children go to school				
My realtor				
People with whom I do business				
People with whom I play sports				

People I know support other charities				
People who have asked me to support their favorite charity				
People I know who volunteer for other nonprofit organizations				
Others				

A Donor Bill of Rights

PHILANTHROPY is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To assure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the not-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

I.
To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.

II.
To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.

III.
To have access to the organization's most recent financial statements.

IV.
To be assured their gifts will be used for the purposes for which they were given.

V.
To receive appropriate acknowledgment and recognition.

VI.
To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.

VII.
To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.

VIII.
To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.

IX.
To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.

X.
To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.

Developed by
(AAFRC) American Association of Fund Raising Counsel
(AHP) Association for Healthcare Philanthropy
(CASE) Council for Advancement & Support of Education
(AFP) Association of Fundraising Professionals

Endorsed by: Independent Sector
National Catholic Development Conference (NCDC)
National Committee on Planned Giving (NCPC)
National Council for Resource Development (NCRD)
United Way of America

CVTA Development Plan

Goal	Objective	Person/Team Responsible	Budget	Time to Complete

