

# Get Fully Funded:

*How to Raise  
the Money of Your Dreams*

---

*7 Simple Steps to  
Fully Funding Your  
Mission So You Never  
Have to Worry about  
Fundraising Again!*



**By Sandy Rees, CFRE**

# Table of Contents

The Get Fully Funded System .....	8
Results you can expect.....	9
How to use this system .....	10
<b>Step 1 – Make Fundraising a Priority.....</b>	<b>12</b>
1.1 Make a commitment to fundraising .....	14
1.2 Clear the decks .....	15
<i>Daily Time Assessment Worksheet.....</i>	17
1.3. Prioritize your daily tasks .....	18
<i>Daily Priorities Worksheet .....</i>	20
1.4 Manage and protect your time .....	21
<i>Time Management Worksheet.....</i>	23
1.5 Get yourself ready to raise money .....	24
<i>Money Beliefs Worksheet.....</i>	25
1.6 Get organized .....	30
<i>Get Fully Funded Master To Do List Template.....</i>	32
1.7 Be ethical and honest .....	33
<i>AFP Code of Ethics.....</i>	34
1.8 Get legal .....	36
1.9 Get your infrastructure ready .....	36
<i>Fundraising Office Systems Brainstorm Worksheet .....</i>	39
<i>Fundraising Office Systems Worksheet .....</i>	40
<i>Nonprofit Help Worksheet .....</i>	43
<i>Volunteer Readiness Checklist.....</i>	44
<b>Step 2 – Understand Why People Give .....</b>	<b>46</b>
2.1 Find out why people give.....	47
2.2 Prepare to appeal to the donor’s emotion .....	48
2.3 Focus on transformational vs transactional fundraising .....	48
<i>Transactional vs Transformational Fundraising Activities.....</i>	50
<i>Fundraising Type Worksheet .....</i>	51
2.4 Discover each prospect’s Linkage, Interest, and Ability .....	52
<i>Donor LIA Worksheet .....</i>	53
2.5 Stop worrying about other nonprofits stealing your donors .....	54
2.6 Understand and use the Donor Pyramid .....	54
<i>Donor Pyramid Worksheet .....</i>	56
2.7 Prepare your Case Statement .....	57
<i>Simple Case Statement Template.....</i>	59
<i>Simple Program/Project Summary Worksheet .....</i>	62
<b>Step 3 – Identify the Best Donor Prospect.....</b>	<b>63</b>
3.1 Create a Donor Profile .....	64
<i>Typical Donor Profile Worksheet.....</i>	65
3.2 Conduct a Donor Survey.....	66

<i>Sample Donor Survey</i> .....	67
3.3 Develop a short and sweet version of your mission statement .....	68
3.4 Determine your key message(s).....	68
3.5 Identify your target audience(s).....	69
3.6 Position your organization .....	69
<b>Step 4 – Tell Your Story .....</b>	<b>71</b>
4.1 Communicate consistently and effectively with your target audience(s) .....	72
4.2 Create and use donor-focused materials .....	73
<i>Donor-Focused Materials Checklist</i> .....	75
<i>Jargon Reduction Exercise</i> .....	76
4.3 Develop and implement a marketing communications plan.....	77
<i>Marketing Strategy Checklist</i> .....	79
<i>Marketing Communications Plan Template</i> .....	80
4.4 Decide how you will measure success.....	81
4.5 Create a user-friendly website .....	81
<i>Donor-Focused Website Checklist</i> .....	84
4.6 Produce a must-read newsletter .....	85
<i>Newsletter Goals Worksheet</i> .....	88
<i>Print Newsletter Planning Worksheet</i> .....	90
<i>Digital Newsletter Planning Worksheet</i> .....	91
<i>Print Newsletter Production Schedule Template</i> .....	94
<i>Sample Print Newsletter Production Schedule</i> .....	95
<i>In-House Print Newsletter Production Schedule Template</i> .....	96
<i>Outsourced Print Newsletter Production Schedule Template</i> .....	97
<i>Digital Newsletter Production Schedule Template</i> .....	98
<i>Print Newsletter Budget Template</i> .....	101
<i>Donor-Focused Newsletter Checklist</i> .....	111
<i>Newsletter Summary Checklist</i> .....	113
4.7 Leverage the media to tell your story .....	114
<i>Press Release Template</i> .....	116
<i>Sample Press Release</i> .....	117
4.8 Create and share a powerful Annual Report.....	118
<i>Nonprofit Annual Report Content Checklist</i> .....	119
<b>Step 5 – Plan How and When You Will Ask for a Gift .....</b>	<b>120</b>
5.1 Focus on growing your list of donors and prospects .....	122
5.2 Offer donors and prospects plenty of chances to give .....	123
5.3 Set SMART Goals .....	126
<i>Fundraising Goal Worksheet</i> .....	128
5.4 Create and use a Summary Calendar .....	129
<i>Summary Calendar Template</i> .....	130
5.5 Get Organized Every Month for Fundraising.....	131
<i>Monthly Fundraising Review Checklist</i> .....	132
5.6 Raise money with special events .....	133
<i>Special Event Success Checklist</i> .....	136
<i>Special Event Budget Worksheet</i> .....	137
<i>Special Event Planning Checklist</i> .....	138

	<i>Special Event Lessons Learned Worksheet</i> .....	140
5.7	Raise money with grants.....	141
	<i>Common Grant-Related Terms List</i> .....	143
	<i>Program/Project Brainstorming Worksheet</i> .....	144
	<i>Program/Project Description Worksheet</i> .....	145
	<i>Grant Budget Template – Simple Version</i> .....	149
	<i>Grant Budget Template – Detailed Version</i> .....	150
	<i>Grant Research Worksheet</i> .....	153
	<i>Specific Grant Funder Research Worksheet</i> .....	157
	<i>Specific Grant Funder Research – Form 990 Worksheet</i> .....	160
	<i>Letter of Inquiry Template</i> .....	163
	<i>Descriptive Words Library</i> .....	167
	<i>Grant Proposal Review Checklist</i> .....	169
	<i>Simple Grant Writing Checklist</i> .....	170
	<i>Grant Funding Summary Checklist</i> .....	175
5.8	Raise money with direct mail.....	176
	<i>Direct Mail Readiness Self-Evaluation</i> .....	177
	<i>Direct Mail Goals Worksheet</i> .....	181
	<i>Direct Mail Plan Worksheet</i> .....	182
	<i>In-House Mailing Production Schedule Template</i> .....	187
	<i>Outsourced Mailing Production Schedule Template</i> .....	188
	<i>Direct Mail Appeal Budget Worksheet</i> .....	191
	<i>Data Maintenance Plan Worksheet</i> .....	195
	<i>Ideal Fundraising Letter Template</i> .....	201
	<i>Fundraising Letter Proofing Checklist</i> .....	204
	<i>Direct Mail Summary Checklist</i> .....	211
5.9	Raise money using Major Gifts.....	212
	<i>Major Donor Prospect Research Worksheet</i> .....	217
	<i>Donor Profile Record</i> .....	218
	<i>Sample Major Donor Cultivation Plan</i> .....	221
	<i>Major Donor Cultivation Plan Worksheet</i> .....	222
	<i>Donor Conversation Notes Worksheet</i> .....	226
	<i>Ask Conversation Formula</i> .....	229
	<i>Major Gifts Summary Checklist</i> .....	233
5.10	Raise money using Planned Giving.....	234
5.11	Raise money from corporate donors.....	235
	<i>Corporate Donor Prospect List</i> .....	237
	<i>Corporate Donor Profile Record</i> .....	238
	<i>Corporate Donor Cultivation Plan Worksheet</i> .....	240
	<i>Corporate Donor Summary Checklist</i> .....	241
5.12	Raise money using matching gifts.....	242
5.13	Raise money online.....	243
	<i>Online Fundraising Readiness Self-Evaluation</i> .....	244
	<i>Online Fundraising Goal Worksheet</i> .....	246
	<i>Donor Email List Management Worksheet</i> .....	248
	<i>Online Fundraising Summary Checklist</i> .....	256

5.14 Raise money with monthly giving .....	257
<i>Monthly Giving Program Worksheet</i> .....	259
<i>Monthly Giving Summary Checklist</i> .....	260
<b>Step 6 – Acknowledge and Steward the Gift .....</b>	<b>261</b>
6.1 Have an ‘Attitude of Gratitude’ .....	262
6.2 Send a Powerful Thank-You Letter .....	264
<i>Donor Acknowledgement Flow Chart</i> .....	265
<i>Thank-You Letter Template</i> .....	270
<i>Sample Thank-You Letter 1</i> .....	271
<i>Sample Thank-You Letter 2</i> .....	272
<i>Thank-You Letter Opening Sentence Examples</i> .....	273
<i>Thanking Words Library</i> .....	274
<i>Sample Thank-You Letter &amp; Gift Receipt Combo</i> .....	276
6.3 Create and Use a Donor Acknowledgement Plan.....	278
<i>Sample Donor Acknowledgement Plan</i> .....	280
<i>Donor Acknowledgement Plan Template</i> .....	281
<i>Sample Call Report Form</i> .....	284
6.4 Steward the Gift .....	286
<i>Sample Restricted Gifts Tracking Sheet</i> .....	288
6.5 Build Relationships .....	289
<b>Step 7 – Evaluate Success and Get Fully Funded .....</b>	<b>293</b>
7.1 Evaluate your overall fundraising success .....	294
<i>Fundraising Budget Tracking Sheet</i> .....	295
7.2 Evaluate your success with special events.....	296
7.3 Evaluate your success with grants .....	296
<i>Grant Tracking Worksheet</i> .....	298
7.4 Evaluate your success in the mail .....	299
<i>Newsletter Tracking Sheet</i> .....	302
<i>Direct Mail Tracking Sheet</i> .....	303
7.5 Growing into the Fundraising Manager.....	304
<b>Next Steps .....</b>	<b>307</b>
Appendix 1 – The Donor Bill of Rights.....	309
Appendix 2 – Common Leadership Mistakes and Solutions.....	310
Appendix 3 – Teaching your Board about fundraising.....	312
<i>Sample Board Member Fundraising Commitment Form</i> .....	318
Appendix 4 – Quick Fundraising Ideas .....	320
Appendix 5 – Jargon Reduction Exercise Answers.....	323
Appendix 6 – Committee Meeting Form Templates .....	324
Appendix 7 – Fundraising Coaching .....	326
<b>About Sandy Rees .....</b>	<b>328</b>