

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

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Table of Contents

The Get Fully Funded System	8
Results you can expect.....	9
How to use this system	10
Step 1 – Make Fundraising a Priority.....	12
1.1 Make a commitment to fundraising	14
1.2 Clear the decks	15
<i>Daily Time Assessment Worksheet.....</i>	<i>17</i>
1.3 Prioritize your daily tasks	18
<i>Daily Priorities Worksheet</i>	<i>20</i>
1.4 Manage and protect your time	21
<i>Time Management Worksheet.....</i>	<i>23</i>
1.5 Get yourself ready to raise money	24
<i>Money Beliefs Worksheet.....</i>	<i>25</i>
1.6 Get organized.....	30
<i>Get Fully Funded Master To Do List Template.....</i>	<i>32</i>
1.7 Be ethical and honest	33
<i>AFP Code of Ethics.....</i>	<i>34</i>
1.8 Get legal.....	36
1.9 Get your infrastructure ready	36
<i>Fundraising Office Systems Brainstorm Worksheet</i>	<i>39</i>
<i>Fundraising Office Systems Worksheet</i>	<i>40</i>
<i>Nonprofit Help Worksheet</i>	<i>43</i>
<i>Volunteer Readiness Checklist.....</i>	<i>44</i>
Step 2 – Understand Why People Give	46
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>	<i>50</i>
<i>Fundraising Type Worksheet</i>	<i>51</i>
2.4 Discover each prospect’s Linkage, Interest, and Ability	52
<i>Donor LIA Worksheet</i>	<i>53</i>
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>	<i>56</i>
2.7 Prepare your Case Statement	57
<i>Simple Case Statement Template.....</i>	<i>59</i>
<i>Simple Program/Project Summary Worksheet</i>	<i>62</i>
Step 3 – Identify the Best Donor Prospect.....	63
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
Step 4 – Tell Your Story	71
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
Step 5 – Plan How and When You Will Ask for a Gift	120
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
Step 6 – Acknowledge and Steward the Gift	261
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 & 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
Step 7 – Evaluate Success and Get Fully Funded	293
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
Next Steps	307
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
About Sandy Rees	328



Dear reader,

I'm so excited to bring you my personal model for fundraising, the Get Fully Funded system.

I've created this system based on my own experience of what works and what doesn't in nonprofit fundraising. Whether you're new to fundraising or have tried some things but not seen the results you want, this book is for you.

You won't find a lot of fluff here. Instead, you'll find practical, step-by-step directions for all the pieces and parts you need to implement to raise all the money your organization needs to fulfill its mission.

I know that no two nonprofits are exactly alike. So, you'll find plenty of room for creativity and customization in the Get Fully Funded system. As long as you adhere to the foundational principles, you'll be fine.

My greatest desire is to help as many nonprofit organizations as I can to become super successful at fundraising. I hope that you will study this workbook carefully and use the information to strengthen your fundraising efforts. After all, I want you to Get Fully Funded!

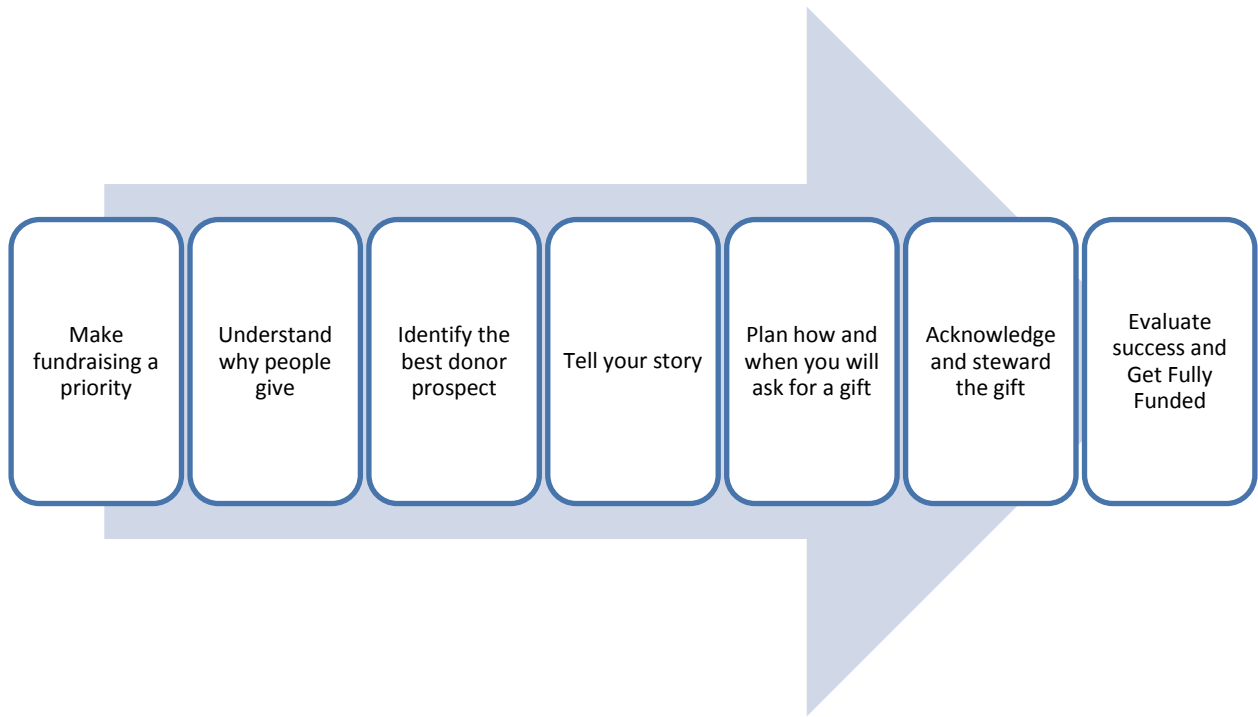
Warmly,

A handwritten signature in cursive script that reads "Sandy".

Sandy Rees
Fundraising Coach

The Get Fully Funded system

How to Raise the Money of Your Dreams



Results you can expect

The Get Fully Funded system is like anything else – the more you put into it, the more you'll get out of it!

It's not a quick fix to your fundraising woes. Instead, it's a proven system that, when implemented, will lead to a steady, long-term stream of revenue for your nonprofit.

If you are committed to the success of your nonprofit organization and you're willing to do the work I outline in this book, I think you will begin to see results fairly quickly. Typically, it can take up to a year (or more) to get a complete fundraising program in place, but I'm going to help you shortcut that process by getting you laser-focused on the exact tasks that will give you the most return on your investment. In other words, **I believe this system will help you raise more money and do it faster than you could do on your own.** You should recover your investment in this system within a few weeks, and maybe even with 1 new donor!

The nonprofit clients I work with privately see results within the first few months. Here's what they do to be successful:

- **They take ACTION and implement the steps of the system.**
- **They get really good at telling their story to lots of people.**
- **They create a written plan for fundraising.**
- **They get out there and spread the word about their cause.**
- **They learn how to say “no” to things that don't help them raise money.**
- **They work smarter, not harder.**
- **They create systems to make their work easier.**
- **They develop deep and lasting relationships with key supporters and donors.**
- **They create diverse revenue streams from a variety of fundraising strategies.**
- **They thank every donor, every time, and do a fantastic job of it.**
- **They track where their fundraising dollars are being spent and where the most money is being raised.**
- **They regularly review their fundraising plan and make adjustments as needed.**

How to use this system

There is a LOT of information in this book! In fact, you might get overwhelmed just looking through it.

I want you to **take it one step at a time** so that you can soak it in and focus on one small piece at a time. Work through the worksheets and complete the tasks. The other reason I want you to go step-by-step is because each section will build on the one before it. When you get to the end, you'll have everything you need to raise all the money your organization needs.

Don't skip any steps, even if you think you already know that part. Each step has been carefully developed to give you everything you need to be successful in raising money.

The key here is to TAKE ACTION. Don't read through the book and put it on the shelf. You must take action in order to see results.

Before we begin...

Before we get started there are a couple of things I want to share with you.

First, being a professional Fundraiser is a respectable and honorable profession. You are part of an elite group of people across this planet who have the privilege of connecting donors with organizational missions. You **GET** to change peoples' lives for a living! Isn't that great? Soak that one in for a minute.

Second, you are NOT alone. There are lots of places where you can get help. The very fact that you are holding this book tells me you have what it takes to succeed. You know how to seek out answers to your questions. Fundraising can be a lonely job, but it doesn't have to be. There are groups like AFP (the Association of Fundraising Professionals) and online forums where you can connect with others just like you who are struggling with the same things you are. There's power in community so take advantage of it whenever you can.

Finally, you CAN do this. You can do anything you make up your mind to do. I've worked with dozens of nonprofit organizations who were able to raise big money very quickly, and I know you can do it, too.

Realize that nothing I am going to share with you is rocket science. It's just simple, practical steps that you can take to attract more donors and reach your fundraising goals.

And remember, I'm here rooting for you!

A handwritten signature in black ink that reads "Sandy". The signature is written in a cursive, flowing style.

Step 1

Make Fundraising a Priority

Step 1 – Make Fundraising a Priority

Fundraising is the organized activity of soliciting money or pledges for a charitable organization. It's about giving people the opportunity to support your organization's work by making a financial gift.

Some see it as a necessary evil. Others see it as a way to change lives.

Either way, nonprofit organizations must have funds to operate and fulfill their missions.

Most fundraising falls into two different categories: annual and capital. Capital campaigns are usually about raising money for buildings and equipment. Annual campaigns are typically meant to cover annual operating expenses. While there are completely different strategies for each of these, many of the principles of my Get Fully Funded system will apply equally well to both. Having said that, I'm going to focus on annual campaigns in this book.

What does it mean to Get Fully Funded?

Getting Fully Funded is a phrase I coined to describe your fundraising program when everything is clicking along like a well-oiled machine and you are able to easily raise all the money your organization needs to deliver its services. Your donors are happy, your staff is fulfilled, and your Board members are proud. It's a joyful place to be!

Getting Fully Funded is a state of fundraising where you raise all the money your organization needs to fulfill its mission. In short, it means you are easily meeting budget every year. In practical terms, it means

- Staff have all the supplies and equipment they need
- Bills are paid
- Rainy day fund or reserve is established
- Donors are engaged and happy

It's a fabulous place to be!

And it's not a short-term experience. Once you have implemented the principles of the Get Fully Funded system, you have set your nonprofit organization up for long-term success.

What it takes to Get Fully Funded

After working with scads of nonprofit organizations over the years, I've noticed that the really successful ones share some common characteristics. And oddly enough, these are the organizations who are implementing the principles of Get Fully Funded. I've boiled them down to four simple pillars that **must** be in place in order to Get Fully Funded.

1. **Passion.** Wildly successful nonprofits are lead by individuals who have a fire in their belly for the work done by the nonprofit they serve. This passion for their cause can turn into a raging wildfire when shared with others, and becomes the basis for successful fundraising. No passion = little to no fundraising.
2. **Strong leadership.** Fully Funded organizations have strong leaders in place, both staff and Board. The Executive Director is a good leader who instills pride in their staff. They carry the vision for the organization into the community and represent the organization well. The Board is a well-functioning group of community leaders who are passionate about the cause and committed to its success. They understand and embrace their roles, and are willing to do whatever it takes to change lives.
3. **Compelling mission.** You must have a mission that gets people excited and interested in helping. The more widely accepted your mission is, the easier it will be to raise money. I find that nearly every nonprofit has a compelling mission. The trick is for you to believe your nonprofit's mission is compelling and learn how to share it with others in a way that sets their soul on fire.
4. **Donor-based fundraising.** Donors are not ATM machines. You must treat them as investors or partners in your work. By focusing your fundraising on your donors instead of on your organization, you'll develop long-term supporters for your organization's mission. After all, successful fundraising is all about relationships.

When you combine these four powerful elements, the result is a Fully-Funded nonprofit organization!



1.1 Make a commitment to fundraising

One of the first things you must do if you want to attract more donors and raise more money is to actually make time for fundraising. Too many people put fundraising on the back burner, because they think something else is more important or they don't like fundraising. Maybe they don't know how to manage their priorities so they do the easy things first regardless of how important they are (I used to do this!).

I want you to draw a line in the sand and make a commitment right now to yourself, your nonprofit, and the lives your nonprofit changes to make fundraising a priority. Vow that you will make time for fundraising.

In fact, why don't you go ahead and put that commitment in writing here?

I commit to making fundraising a priority.

signature

date

1.2 Clear the decks

You're going to need as much as 4-6 hours a day to focus on the fundraising and marketing tasks I'm going to show you, so you need to clear the decks of non-essential tasks. You probably have time leaks during your day that are eating up precious minutes that you could be spending working on fundraising. Look for these and other time leaks and get rid of them:

- Playing computer games
- Personal phone calls
- Catching up on the news on Facebook
- Chatting with co-workers about last night's episode of "Idol"

I know you may think this is harsh. But trust me – successful Fundraisers don't do these things and neither should you.

You may be doing other things that you need to put hit the "Pause" button on until you get your fundraising activities running smoothly. These activities are perfectly worthwhile, but they need to wait for a few months. Remember, fundraising is your priority right now. Hit the "Pause" button on things like:

- Serving on committees or Boards outside of your nonprofit
- Serving on non-fundraising committees
- Volunteering for other organizations
- Being a class Mom for your child's classroom

- Running extensive errands during the day
- Anything else that takes up your time during the business day

Remember that this is about clearing out time clutter and making room for fundraising tasks. We need you talking to donors and telling your organization's story, not making copies or running to the bank.

During the day, you should ONLY be working on things that:

- 1. Increase your ability to raise money**
- 2. Spread the word about your nonprofit organization**
- 3. Build relationships with donors and supporters**
- 4. Raise money**

After several months (or even a year), you can start to add some of the other things back in. Hopefully, you'll love the results you're getting so much that you won't ever put the time leaks back into your life!

Your Homework

Clear the decks. One of the best ways to get a handle on how you spend your time is to keep a time journal for a few days. I recommend you keep a pad of paper and a pen by your desk and write down everything you do during the day and how long you spend doing it. Include **everything** (even going to the restroom!). After a day or two or this, you'll be able to easily spot things that need to go.

Then eliminate them. Get rid of the things (at least for now) that eat up your day.

Use the Daily Time Assessment Worksheet to help you.

1.3. Prioritize your daily tasks

If you're like most nonprofit professionals, you are inundated with stuff to do. Your "To Do" list grows longer everyday with no end in sight.

We all have the same 24 hours in a day. The key to success is knowing which things to focus on at any given time. If you want to Get Fully Funded, you need to learn how to spend your time on the things that matter and that will move you forward toward your fundraising goals. If you're like many people, you're probably doing lots of different things during the day like:

- **Things you shouldn't be doing in the first place** (like serving on non-fundraising committees)
- **Things that are easy to do that anyone in your office or a volunteer could do** (like filing or stuffing envelopes)
- **Things that could be delegated to someone else** (like editing a newsletter or making changes to a website)
- **Things that only you can do** (like building relationships with donors)

I bet you can guess what I'm going to tell you to focus on!

You must spend your time on the things that only you can do and those things that move you closer to your fundraising goals. This level of priority management may seem extreme, but it can be learned and implemented.

Here's an easy way to create priorities for yourself each day.

1. **Write down all the tasks you need to get done** (no need to write them in any particular order).
2. **Go through the list and delete those that you don't need to be doing in the first place.** Delegate anything you can.
3. **Go back through the list again and prioritize the items using this system.** Be brutally honest with yourself when prioritizing this list.
 - "A" is what MUST get done today.
 - "B" is what is important to get done today. (Notice the difference between MUST get done and IMPORTANT to get done – they aren't the same.)
 - "C" can wait a few more days.
4. **Once you have all your tasks lettered, go back through and assign them each a number.** Look at all your "A" items and write "1" beside the first one that must get done, "2" beside the next one, and so on.

Do this at the beginning of each day or at the end of the day (for the next day's tasks). Then when you get ready to work, start on "A1" first and don't do anything else until it's complete. Then move on to "A2" and so on. This is how successful people get stuff done!

If this system is new for you, hang in there until it starts to work for you. I've used this system myself and found it to be a great way to focus on what's really important.

Your Homework

Commit to managing your "To Do" list every day. Use the Daily Priorities Worksheet to help you get the most from your day.

1.4 Manage and protect your time

It's a common feeling among nonprofit fundraising staff that they have more to do than they can get done. There's so much to do and the work never seems to end. It's easy to get overwhelmed.

Time management is one of the most important skills that a nonprofit fundraising professional can master. Being able to focus on priorities and get things done can make all the difference in successfully raising money.

The most important thing you can do is to keep your eye on the goal and make sure that everything you do moves you toward that goal. If your goal is to raise \$100,000, make sure that everything you do during the day moves you toward it. If not, you need to ask yourself why you're doing that task.

Here are some more things I strongly recommend to help you manage your time.

1. **Check email first thing in the morning, then close it.** You don't need your email program open all day long. When it's open, it's an interruption. Check your email first thing, respond as needed, then close it. Open it again at lunch to check in, then close it again when you're done. Check it one last time before you're done for the day. You'll find that you can concentrate better without the interruption and you'll get TONS more done.
2. **Turn your phone off during the day.** When you have important projects to work on, like grant proposals or newsletters, turn your phone off so you won't be interrupted. Once you complete the project, you can turn the phone back on.
3. **Cluster similar items.** If you have several phone calls to make, block off time in your schedule and make them one after the other. When you're in the flow of talking on the phone, stay in the flow. Don't try to make a phone call, then work on something else, then make another call. By batching your tasks like this, you'll get more done.
4. **Focus on your productive time of day.** We all have times of day when we're more productive than others. If you're a morning person, use the morning hours to work on those projects that need your highest thinking and most intense concentration. Save the easier tasks for the afternoon. If you're an afternoon person, do your intense work in the afternoon.
5. **Schedule enough time off.** If you're going to be a fundraising whiz, you must have time off to let your mind, body, and soul re-charge. Be sure to play and have fun when you aren't at work. Get your vacations in – having more accumulated vacation days than anyone else is not a badge of honor! Don't take work home every night and work every weekend. You'll burn out and you won't be helpful to anyone. When you're rested and refreshed, you'll have more energy to devote to fundraising. Your donors don't want to talk to you when you're tired and cranky from overwork.

6. **Don't cram your schedule full.** Allow time for interruptions in your day. When a donor visits or a news reporter calls you for an interview, you want to be able to respond to them without feeling pinched for time.
7. **Delegate whenever possible.** Do only those things that you can do and delegate everything else. If you have no one to delegate to, recruit a volunteer or an intern to help you.
8. **Say "no" to nonessential tasks or activities that don't help you raise money.** Consider carefully before you take on additional work. Also be careful about agreeing to serve on committees that won't be a good use of your time.

When you can effectively manage your time, you'll find that you are less stressed and more confident about your work. And ultimately, you'll be better at getting your work done.

Your Homework

Practice using these time management tips to manage and protect your time. At the end of each day, use the Time Management Worksheet to help you evaluate how you did that day.

After several days of using this worksheet, this should become habitual for you and you probably won't need the worksheet anymore.

Time Management Worksheet

Use this worksheet at the end of each day to evaluate how well you managed and protected your time throughout the day.

Grade yourself in each area using this scale:

1 = excellent

2 = good

3 = needs attention

4 = so bad that I'll just let myself off the hook for now and do better tomorrow

Today's date: _____

Item

Today's grade

- | | |
|------------------------------------------------------------|-------|
| 1. Check email first thing in the morning, then closed it. | _____ |
| 2. Kept email closed during the day. | _____ |
| 3. Turned phone off during the day. | _____ |
| 4. Clustered similar items. | _____ |
| 5. Accomplished tough tasks during my best time of day. | _____ |
| 6. Delegated what I could. | _____ |
| 7. Left room in my schedule for unanticipated tasks. | _____ |

1.5 Get yourself ready to raise money

I've discovered over the years that one main reason a nonprofit organization isn't raising much money is because of the beliefs of the person(s) responsible for fundraising. There's often a little "stinkin' thinkin'" going on like "we tried that and it didn't work" or "no one is going to give to us because of the economy."

A little shift in attitude and how you look at things can make a big difference. How you feel about fundraising and what you think about it will show up in your results. If you hate it or dread it, you probably won't raise much money.

Be very careful about the thoughts you think and the words you use when it comes to fundraising. If you think "Fundraising is hard," you will find that to be true. It's sort of a self-fulfilling prophecy. Avoid any negative thoughts around raising money. And be mindful of how you think about your donors, too. Strike the phrase "hitting people up for money" from your thoughts and vocabulary. Instead, think about offering people the chance to support the work your nonprofit does in raising money. It's a subtle difference, but an important one.

For those who struggle with fundraising, there may be some deep-seated, long-held fears or beliefs about money. Maybe you didn't talk about money growing up and now you feel uncomfortable asking for it. Maybe there were arguments every time the subject of money came up. In order to be successful with fundraising, you have to either overcome those beliefs or at least learn to manage them.



Use the Money Beliefs Worksheet to uncover what you really think deep inside about money.

Money Beliefs Worksheet

What you believe about money will affect your ability to raise money. Complete these sentences honestly to discover how you feel about money.

Talking about money makes me feel _____

The thought of asking for money makes me feel _____

Giving money makes me feel _____

People who have lots of money are _____

I imagine that when I raise a lot of money I will feel _____

Most of us feel wonderful when we give money. And yet we forget that experience when it's time to ask someone else for a donation. Keep in mind that you are giving that donor the chance to enjoy the happiness and joy that comes with giving.

How about replacing the beliefs that aren't serving you with some different thoughts? Let's get your head in the right place so you can be successful raising money. In order to get your head in the game, there are 8 Big Thoughts I want you to think and take to heart:

1. **Be passionate about your cause.** You are the champion for your organization. No one else cares as deeply or knows as much about your mission as you, so it's up to you to share your passion for your cause with the community. Plus, passion is contagious, so spread it around!
2. **Set a clear intention for what you want.** If you are unsure about what you are after with your fundraising efforts, you'll likely see some lackluster results. Be clear and purposeful about what you are doing, how much money you want to raise, and how it will be used.
3. **Believe in yourself and what you're doing.** This is no time to lose your confidence! If you don't believe in yourself and your organization, how do you expect others to?
4. **Know your strengths and work in them. Get help with the rest.** This is key! If you try to be all things, you're likely to end up frustrated, and then you won't be any good to anyone. Getting help might look like taking a class, hiring a coach, outsourcing, or hiring additional staff. Trying to do something you're not good at, especially if your fundraising depends on it, is like pushing a rock uphill. It's exhausting and not often successful.
5. **Have an 'Attitude of Gratitude.'** In ALL things related to fundraising and your nonprofit organization, be grateful. Thank people for any and all help they give. You'll find that this attitude alone attracts people to your cause.
6. **Be a team player.** Fundraising is a team sport. Find volunteers, other staff, or Board members who can help you, and play nice with them.
7. **Do NOT accept status quo. Always strive for more.** If you're satisfied with the way things are now, you're probably not a good candidate to Get Fully Funded, unless you're already serving every person who needs your organization's help.
8. **Be a lifelong learner.** The world changes fast and we've got to keep up. The day you think you know everything there is to know about nonprofit fundraising is the day you need to retire or quit. There's always something more to learn.

How do you feel about yourself as a fundraiser? Do you have your head in the game? _____

What do you need to work on in order to get your head in the game? _____

The Definitive Dozen

What goes on inwardly has a tremendous impact on what goes on outwardly. The better job you do of monitoring your thoughts and beliefs, the more likely that you will be successful in fundraising.

Here are a dozen beliefs that will define your organization as a successful one and worthy of community support, should you choose to accept them. I challenge you to commit both personally and professionally to these beliefs.

1. **Fundraising is based on relationships.** Your donors are NOT ATM machines. Never treat them as such!! The day you lose sight of your donors as partners is the day your fundraising will start to fall apart.
2. **Fundraising MUST be donor-based.** You must approach fundraising from the viewpoint of your donor, not your organization. It's not about what your organization needs. It's about what the people you serve need and how your donor can help you with that. More about this later.
3. **Gifts must be used as the donor intended.** This is about ethics and integrity. If you don't spend money for the purpose it was given or if you even have the appearance of this, and word gets out into the community, you will have a very difficult time raising money.
4. **Individuals are the best source of untapped donor potential.** Most people think first of approaching local businesses or foundations for a gift, but the truth is that these sources make up a small percentage of the total amount of money donated to charity each year in the United States. Individual donors continue to be the largest untapped source of potential giving.
5. **Effective donor communication is essential.** We must communicate with our donors to "keep them in the loop" about what's happening with our work and to let them know the impact their gift is having.
6. **Creating donor loyalty is critical.** It's exhausting to always be looking for new donors. The better job we do of giving our donors a good experience with us, the more likely they will support us long-term. Long-term givers tend to become planned givers, which is the greatest kind of support we can get from a donor.

7. **Diversified revenue streams are critical for long-term sustainability.** In order to keep our organization financially stable, we need to make sure we have diversified revenue streams. This means we don't want all our eggs in one basket. We don't want any one grant or event or even one donor making up more than about 15% of our total revenue. If we lose a large funding source, it could mean eliminating a program or shutting our doors. But if we have money coming from lots of different places, we can manage the loss of one without much interruption.

8. **Efficiency comes from 'picking the lowest hanging fruit on the tree.'** Focus on the things that will bring you the most result for your efforts. This means you are using your time and resources as effectively as possible.

9. **Nonprofit organizations MUST be transparent and accountable with financial matters.** Always be willing to share your financial information with any donor or member of the community. There shouldn't be anything you don't want people to see. If your organization has nothing to hide, but you have the appearance of hiding something, it will hurt your reputation and make fundraising difficult. Being willing to share builds trust

10. **Be proactive, not reactive.** You simply cannot fully fund your organization if you spend all your time fighting fires or dealing with the crisis of the day. Spend the time necessary to get a plan in place so that you can be proactive instead of reactive.

11. **Results should always be measured.** If you don't know how you're doing, you can't improve on it.

12. **Passion is contagious.** Share yours! It's the best way to engage others in the work you're doing.

Which one(s) of the Definitive Dozen resonates the most with you? Which one(s) seems to strike a chord for you? _____

Which one(s) (if any) will be the greatest challenge for you? _____

How can you get help with it/them? _____

A word about Fundraising competition

Should you worry about competing with established nonprofits? No. There's enough money out there for everyone.

If you work with a small organization, don't buy into the mentality that you are a "little" nonprofit or a "newbie." Believe in what you're doing and others will too. Then, build your donor base one by one. Consistently add new donors to your list and over time, you'll have just as big a donor pool as any other organization.

Likewise, don't be jealous of other nonprofits' fundraising success.

We hear regularly about other nonprofit organizations that have received enormous gifts or had incredibly successful events. It's easy for other nonprofits, especially small ones, to become green with jealousy. It's understandable – we all want our organization to do well and prosper.

Not too long ago, there was a story in the news of a million dollar gift given to the local university. Many smaller nonprofits told me they were feeling depressed about it. They want to receive that level of gift, but aren't sure they ever be able to secure that kind of funding.

I certainly understand, but here's the truth about competition among nonprofits: People give to organizations and causes they care about. Universities will always attract and raise more money than small, grassroots organizations. You have to keep on doing business as usual in your Development office and know that, if anything, this proves that even in economic uncertainty there is plenty of money out there to be donated. Don't put your head down and give up in defeat!

The best thing you can do is to continue to build relationships with your donors. Keep getting to know them. Keep taking them to lunch. Keep sending handwritten notes. Keep learning about them and why they care about your organization.

And don't be afraid of any other organization's success. In fact, be grateful. When individuals feel the rush from making a large gift, it usually encourages them to want to do it again. Next time, it could be you receiving a large gift!

Successful fundraising depends on many factors, but it mostly depends on you, the fundraiser. Your knowledge, ability, and attitude determine whether or not you will be successful in reaching your goals.

Your Homework

If you haven't already, work through the exercises in this section. Spend some time thinking about your beliefs around money. And see if you have your "head in the game" about fundraising.

1.6 Get organized

The more organized you are, the more effective and efficient you will be in fundraising. In my experience, the more organized I've been, the more ready I've been for new opportunities that come along. If getting organized is a challenge for you, I encourage you to find a class or a book to help you.

Here are a few tips that I've used and recommend:

- **Keep the clutter to a minimum.** Dozens of scraps of paper and post-it notes is a recipe for information overload and overwhelm! Plus, it's likely that you'll lose something important. Clutter is usually a sign of indecisiveness. Guard your space carefully and be conscious of piles of stuff that you aren't sure what to do with.

Of course there have been times (like after an event) when my office was totally trashed. I knew I need to give myself a day or two to wrap up and clean up before I started on the next thing.

- **Touch each piece of paper only once.** If you can answer it or handle it in less than 2 minutes, take care of it right then. If it can be delegated to someone else, do it. If it requires a bigger block of your time, then find a day and time when you can get it handled and pencil it in on your calendar. Keep in mind that you don't HAVE to say "yes" to everything that comes along. Sometimes you need to say "no" to a piece of paper and that means you can trash it.
- **Create a filing system that works for you.** There are lots of ideas and options out there so find one you like and use it. That means putting things away when you aren't using them and keeping things where they belong so you don't waste time searching for things.
- **Keep one calendar.** I've seen people try to keep multiple calendars and it doesn't take long before they start getting confused and missing appointments. It doesn't matter which format you use, just use one.
- **Plan for tomorrow.** Take 10 minutes at the end of each day to prepare for the next day and plan what activities you'll work on. Then you can start your day ready to go and not dealing with the leftovers from the day before.

Personally, I use a small paper calendar in conjunction with a detailed “to-do” list. Here’s the actual format that I’ve created and use for myself. It’s not very techie, but it works for me.

Your Homework

Find or create a system that works for you to stay organized.

Get Fully Funded Master To Do List Template

Monday	Tuesday	Wed	Thursday	Friday

Due back from others

-
-
-

Upcoming deadlines

-
-
-

1.7 Be ethical and honest

This is pretty straight forward. As a fundraiser, you should ALWAYS be ethical and honest. If you aren't and you or your organization gets a reputation for being unethical or dishonest, you can forget fundraising. It's not going to happen for you anymore.

An easy way to make decisions that have ethical implications is to use the "Front Page" test. If the story and your decision showed up on the front page of the newspaper tomorrow, what would your Mama say? This usually helps me decide which way to go!

The Association of Fundraising Professionals (AFP) requires its members to sign a Code of Ethical Standards. I think everyone involved in fundraising should adhere to this code, AFP member or not.

Your Homework

Review and consider adopting the AFP Code of Ethics for your nonprofit fundraising work.

AFP Code of Ethics

Member Obligations

1. Members shall not engage in activities that harm the members' organizations, clients or profession.
2. Members shall not engage in activities that conflict with their fiduciary, ethical and legal obligations to their organizations, clients or profession.
3. Members shall effectively disclose all potential and actual conflicts of interest; such disclosure does not preclude or imply ethical impropriety.
4. Members shall not exploit any relationship with a donor, prospect, volunteer, client or employee for the benefit of the members or the members' organizations.
5. Members shall comply with all applicable local, state, provincial and federal civil and criminal laws.
6. Members recognize their individual boundaries of competence and are forthcoming and truthful about their professional experience and qualifications and will represent their achievements accurately and without exaggeration.
7. Members shall present and supply products and/or services honestly and without misrepresentation and will clearly identify the details of those products, such as availability of the products and/or services and other factors that may affect the suitability of the products and/or services for donors, clients or nonprofit organizations.
8. Members shall establish the nature and purpose of any contractual relationship at the outset and will be responsive and available to organizations and their employing organizations before, during and after any sale of materials and/or services. Members will comply with all fair and reasonable obligations created by the contract.
9. Members shall refrain from knowingly infringing the intellectual property rights of other parties at all times. Members shall address and rectify any inadvertent infringement that may occur.
10. Members shall protect the confidentiality of all privileged information relating to the provider/client relationships.
11. Members shall refrain from any activity designed to disparage competitors untruthfully.

Solicitation and Use of Philanthropic Funds

12. Members shall take care to ensure that all solicitation and communication materials are accurate and correctly reflect their organizations' mission and use of solicited funds.

13. Members shall take care to ensure that donors receive informed, accurate and ethical advice about the value and tax implications of contributions.

14. Members shall take care to ensure that contributions are used in accordance with donors' intentions.

15. Members shall take care to ensure proper stewardship of all revenue sources, including timely reports on the use and management of such funds.

16. Members shall obtain explicit consent by donors before altering the conditions of financial transactions.

Presentation of Information

17. Members shall not disclose privileged or confidential information to unauthorized parties.

18. Members shall adhere to the principle that all donor and prospect information created by, or on behalf of, an organization or a client is the property of that organization or client and shall not be transferred or utilized except on behalf of that organization or client.

19. Members shall give donors and clients the opportunity to have their names removed from lists that are sold to, rented to or exchanged with other organizations.

20. Members shall, when stating fundraising results, use accurate and consistent accounting methods that conform to the appropriate guidelines adopted by the American Institute of Certified Public Accountants (AICPA)* for the type of organization involved. (* In countries outside of the United States, comparable authority should be utilized.)

Compensation and Contracts

21. Members shall not accept compensation or enter into a contract that is based on a percentage of contributions; nor shall members accept finder's fees or contingent fees. Business members must refrain from receiving compensation from third parties derived from products or services for a client without disclosing that third-party compensation to the client (for example, volume rebates from vendors to business members).

22. Members may accept performance-based compensation, such as bonuses, provided such bonuses are in accord with prevailing practices within the members' own organizations and are not based on a percentage of contributions.

23. Members shall neither offer nor accept payments or special considerations for the purpose of influencing the selection of products or services.

24. Members shall not pay finder's fees, commissions or percentage compensation based on contributions, and shall take care to discourage their organizations from making such payments.

25. Any member receiving funds on behalf of a donor or client must meet the legal requirements for the disbursement of those funds. Any interest or income earned on the funds should be fully disclosed.

More information on ethics in fundraising can be found on the AFP website at www.afpnet.org.

1.8 Get legal

The very first thing I want you to do in getting your organization ready is to make sure your organization can legally fundraise. Make sure your organization is registered where necessary and has appropriate permits to fundraise (where required). In the United States, you can use this link to find information about your particular state: <http://www.nasconet.org/agencies>.

Your Homework

Make sure your nonprofit organization has the proper registrations and permits to raise money. Double-check to make sure everything is up to date. You do not want to ask anyone for money until you have this handled!

1.9 Get your infrastructure ready

In order to successfully raise money and achieve Fully Funded status, your organization needs to invest in some infrastructure. Infrastructure usually comes in the form of systems, software, and manpower. Some of these things you can implement without spending any money, but some of them will require an investment. Please consider it that – an investment that will pay off big later.

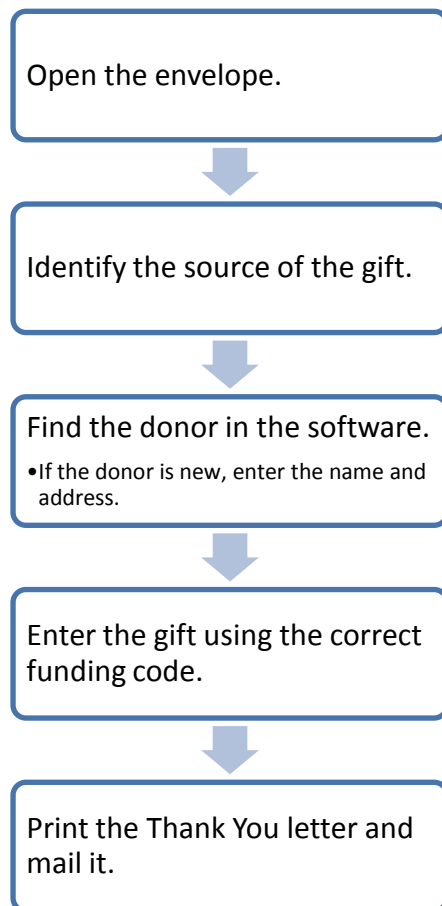
Systems. A system is a method of doing something so that you get the same result every time. Examples include gift entry, thanking donors, and creating a newsletter. With gift entry, you want to make sure that no matter who is entering the gift, it gets done in a standard way, meeting a minimum quality standard. In other words, no matter who is entering the gift, they enter the data consistently.

Anything that you do more than twice is a good candidate for a system. Keep your eyes open for systems you can create that will streamline your activities in make your fundraising efforts run more smoothly.

Written procedures are helpful in creating systems. For example, let's say you notice that you're entering the same kind of gift over and over and so are a few other people in your organization. You decide to create a written procedure to standardize the way data is entered.

Here's a sample of a procedure you might come up with:

Gift entry procedure:



Pretty simple, huh? Procedures don't have to be long or complicated. Usually process itself of creating written procedures can help create some structure around specific activities.

Systems are best when:

- They are in writing.
- They are clearly understood by those who will be using them.
- They are reviewed from time to time to make sure they still work.

Keep in mind that systems can take a long time to develop and evolve. This is not an activity that is going to happen overnight.

You'll need many systems in place in your fundraising office for smooth and efficient operation. Here are a few I recommend you start with (if you don't have these in place already).

- Answering the phone
- Opening the mail
- Processing a donation
- Thanking a donor
- Entering donor information into the database

Over time, you'll discover other systems you need to create. Just remember – anything you do repeatedly needs a system.

Use the Fundraising Office Systems Worksheets to help you think about and create the systems you'll need.

Fundraising Office Systems Worksheet

Create a step-by-step procedure for each system you need.

Creation date: _____

System name: _____

System purpose: _____

Who will use this system: _____

Results we want from using this system: _____

Procedure for this system:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.
- 11.
- 12.

How we will monitor this system to make sure it works: _____

Software. You need several different kinds of software to set your fundraising office up for success. Here are some of the most important that you'll need.

- Donor tracking
- Website
- Online gift acceptance

There are lots of different options out there for software. Let's take a closer look at some of them.

Donor tracking. A donor tracking software is written specifically to help nonprofits keep up with all the bits of information about their donors and the gifts they make. eTapestry and GiftWorks are examples of donor-tracking software.

If you don't currently have a donor-tracking software, you need to get one. There are lots of different choices on the market. Before you buy, compare cost (both upfront and ongoing maintenance or support fees) and features to choose the one that will best meet your needs. Go to www.idealware.org to find more info.

Be wary of customized Access tools. These are often developed by knowledgeable programmers, but they may not have a good understanding of what YOU as a fundraising professional need. Also steer clear of a plain Excel sheet to track donor info. You simply aren't going to be able to get the level of information out that you need.

Website. You MUST have a website and it must look presentable. It doesn't have to be fancy, but it does need to be easy to navigate and up-to-date. There are lots of different tools out there to help you build and maintain a great website. I recommend WordPress (www.wordpress.org) because it's easy to use and you can find affordable help easily.

Online gift acceptance. On your website, you'll need a way to accept donations. There are several tools you can use for this, too. Here are 3 good choices:

- Click and Pledge (www.clickandpledge.com)
- Network for Good (www.networkforgood.org)
- PayPal (www.paypal.com)

Spend a little time investigating these and the others that are out there to find the one that will best meet your needs. Just don't drag it out too long. The longer it takes, the longer you go without a "Donate Now" button!

Volunteers and Interns. There will be times you will need extra hands to get things done. Volunteers and interns are a great source of extra hands to get tasks done and they can help spread the word about the good work you do.

Often, you can get an intern from a local college to work a few hours per week in exchange for a reference or just the experience they get. I once had an intern who was a Communications Major from the local university. All she wanted was to keep samples for her portfolio of the press releases I had her write. Worked for me!

Volunteers work for self-satisfaction, fun, and other intangible rewards. Volunteers want to feel needed. They want to know that the work they do matters. Here are five things you can do before you recruit volunteers to make sure that both they and you have a good experience.

1. **Be clear about volunteer jobs.** Be clear about what you need a volunteer to do. Written job descriptions are good but not necessary. Be honest about time commitments, too. Let your volunteer know when you need them, what they'll be doing, and how long they'll need to be prepared to work. In addition, let them know what they should wear (Business attire? Jeans and sneakers?). Give them as much information as you can so that they'll know what to expect.
2. **Be prepared to spend time with a volunteer.** Be prepared to spend time with the volunteer to orient them on their first day. If the job contains multiple tasks, give them written instructions to make it easier for them. Spending time with volunteers to get them acclimated to your facility and to help them feel comfortable with their job will help ensure a happy and satisfied volunteer down the line. They are giving their time just as donors give their money, so make them feel wanted and needed. It will pay off for you in the long run.
3. **Prepare your staff for volunteers.** Let your staff know when volunteers are coming and what they will be doing. Encourage staff to welcome volunteers and make them feel at home. Be sure to make introductions to the entire staff on your volunteer's first day.
4. **Help volunteers feel comfortable.** Help volunteers to feel comfortable on their first day. Show them where they can find the restroom, fix a cup of coffee, etc. Also, make sure you let them know who they can ask if they have questions. The goal is to help them feel comfortable in your organization, not like an outsider.
5. **Show appreciation to volunteers.** Show appreciation often and in meaningful ways! Treat volunteers as important members of your team and thank them as such. Send thank you notes or emails. Acknowledge volunteers in newsletters or on websites. Remember to acknowledge all your volunteers in a special way during National Volunteer Week each April. Making them feel appreciated brings your volunteers back to your organization time and time again. It brings in new volunteers as well!

Use the Nonprofit Help Worksheet to help you decide on the tasks that volunteers and interns could do for you.

Nonprofit Help Worksheet

Volunteers and interns can be a HUGE help in getting things done in your fundraising office! Use this Worksheet to help you create a list of possible volunteer or intern jobs. Keep in mind that some tasks will require the right person.

Around the office...

- Answer the phone
- Make copies
- File papers
- Organize other volunteers
- Enter data into your database
- Maintain your computer or other office technology
- Go to the post office, office supply store, or bank for you
- _____
- _____
- _____

Specifically for marketing...

- Make updates to the website
- Make updates to your Facebook page
- Help create a brochure or fact sheet
- Help write the newsletter
- Help write and distribute a press release
- Help create an annual report
- _____
- _____
- _____

Specifically for fundraising...

- Print and stuff Thank-You letters
- Make Thank-You calls to donors
- Research possible grant opportunities
- Help put together a grant proposal or application
- Help organize a special event
- Help create fundraising reports
- _____
- _____
- _____

Volunteer Readiness Checklist

Before you bring a new volunteer on board, make sure you have everything ready for them. If you're organized and prepared, it's more likely that your volunteer or intern will have a good experience and want to come back again and again.

Volunteer position: _____

- A clear, written job description has been written for the volunteer position
- Working hours for the volunteer position have been determined
- Attire required for the volunteer position has been determined
- Skills and abilities needed for the volunteer position have been determined
- Volunteer position has been clearly communicated to other staff
- Orientation for the Volunteer's first day has been planned
- Appreciation for the Volunteer has been planned
- Supervision and support for the volunteer position has been planned

Other notes about this volunteer position:

Tips for Appreciating Your Volunteers

Volunteers are the lifeblood of some nonprofit organizations and for many more, they provide a valuable source of manpower. Managing volunteers takes some work and one of the most important things you can do is to acknowledge their efforts. In order to keep your volunteers happy and willing to come back to help again and again, you need to thank and acknowledge them in meaningful ways.

It's a good idea to have a plan for thanking your volunteers so that it's well-thought out and coordinated. Don't let your efforts at appreciation appear hurried or insincere. At least once per year, send your volunteers a note just to say thanks. Perhaps you can send them a Valentine's Day card. Or have an acknowledgement event like a picnic and invite your volunteers to come. The point is to find a way that works for you to let them know how much you appreciate them.

Show appreciation often and sincerely. Treat volunteers as important members of your team and thank them appropriately. Sometimes a simple "thank you" when they arrive to work means a great deal. Acknowledge volunteers in newsletters or on websites, especially for groups of volunteers from businesses. Making them feel appreciated brings your volunteers back to your organization time and time again. It can bring in new volunteers as well!

Every year in April, the United States observes National Volunteer Appreciation Week. Use this as a chance to thank and acknowledge your volunteers publicly by writing a letter to the Editor of your local paper. It's a great way to thank your volunteers as a group and also generate a little publicity at the same time.

Your homework

Work through the exercises and worksheets in this section. Decide on the systems you need and begin to create them. Decide which software you'll use. Think about the tasks you could use a volunteer or intern for and begin working on them.

Ready for more?

There are 6 more steps in the Get Fully Funded system and nearly 300 more pages in the deluxe version of the book (which this chapter came from).

Get yours at <http://getfullyfunded.com/get-fully-funded-books/>

About Sandy Rees

Sandy Rees is a nonprofit fundraising coach and consultant, and specializes in showing Executive Directors how to raise the money of their dreams.

A native Tennessean, she has worked in nonprofit fundraising since 1998 for a variety of organizations including Knox Area Rescue Ministries, Second Harvest Food Bank, and the Joy of Music School.

Her passion is showing small nonprofit organizations how to raise more money, strengthen their Boards, and build relationships with donors. Her strengths include direct mail, nonprofit marketing, strategic planning, and Board development.

Sandy obtained her CFRE (Certified Fundraising Executive) certification in 2003 after meeting the stringent requirements for the certification. She's the author of *Fundraising Buffet* and *Simple Success Fundraising Plan*, and co-author of *7 Essential Steps to Raising Money By Mail*. She's contributed articles to *Advancing Philanthropy*, co-authors the column "Little Shop" for *Fundraising Success Magazine*, and authors the blog *Get Fully Funded*.

Sandy is an accomplished presenter and an AFP Master Trainer. She's led fundraising seminars for America's Second Harvest, Habitat for Humanity of Tennessee, the Association of Fundraising Professionals, and the Chattanooga Center for Nonprofits. She's a sought-after speaker and has travelled internationally to teach fundraising concepts.

Sandy is active in the community and has volunteered with many community organizations including Shangri-La Therapeutic Academy of Riding (STAR), Lost Sheep Ministries, Horse Haven of Tennessee, and Loudon High School Band Boosters. She's a former Girl Scout Leader and currently serves on the Board of Directors for Loudon County Habitat for Humanity.

Sandy lives on a small farm outside Loudon, Tennessee. In her spare time, she likes to quilt, garden, and ride her horse, Harley.

