

Introduction to Fundraising Planning

A Resource List

Fundraising Planning (Overview)

Dove, Kent E. *Conducting a Successful Fundraising Program: A Comprehensive Guide and Resource*. San Francisco, CA: Jossey-Bass Publishers, 2001. Discusses strategies for planning and implementing several different types of fundraising, including annual campaigns, major gifts, planned giving, foundation and corporate grants. Call Number: 710 DOV

Greenfield, James M. *Fundraising Fundamentals: A Guide to Annual Giving for Professionals and Volunteers*. 2nd ed. New York, NY: John Wiley & Sons, 2002. Presents various methods and techniques for annual drive fundraising, utilizing the fictitious Clean Up Cleveland Chapter of the Campaign to Clean Up America. Describes nine principal methods including direct mail, membership associations, telemarketing, donor clubs, corporate and foundation support, online fundraising, special events, and volunteer-led solicitation. Illustrated with numerous sample letters, gift reports, and other documents. Call Number: 711 GRE

Lysakowski, Linda. *Nonprofit Essentials: The Development Plan*. Hoboken, NJ: John Wiley & Sons, 2007. The book covers the steps involved in designing and implementing an integrated development plan, with timetables and areas of responsibility. Includes many worksheets, exhibits, and other planning tools. Call Number: 710 LYS

Novom, Martin L. (ed.) *The Fundraising Feasibility Study: It's Not About the Money*. Hoboken, NJ: John Wiley & Sons, 2007. The authors of this primer discuss how and when to undertake a fundraising feasibility study for a capital campaign. The step-by-step model covers the timeline for a feasibility study, development assessment, how to delegate tasks within the organization, and using consultants. Appendices include sample forms and study reports. Call Number: 713 NOV

Roth, Stephanie. "Creating A Culture of Fundraising in Your Organization." *Grassroots Fundraising Journal*, vol. 20, May–June 2001, p. 9–10. Ten steps for integrating fundraising into all aspects of planning.

Roth, Stephanie; Ho, Mimi; Hung, Priscilla. "Fundraising Planning Worksheet". *Grassroots Fundraising Journal*, September–October 2007, p. 12–5. A six-step organizational tool for developing an annual fundraising plan. Aims to use expenses, fundraising history, available resources, strategy ideas and more as factors to chart what fundraising activities an organization should pursue and how it can effectively set a plan into motion.

Sargeant, Adrian; Jay, Elaine. *Fundraising Management: Analysis, Planning and Practice*. New York, NY: Routledge, 2004. The book covers many major concerns involved in planning and implementing fundraising campaigns from individuals, corporations, foundations and trusts. Authors also deal with research tools as they relate to major gifts and bequests. Call Number: 710 SAR

Schaff, Terry; Schaff, Doug. *The Fundraising Planner: A Working Model for Raising the Dollars You Need*. San Francisco, CA: Jossey-Bass Publishers, 1999. Workbook offering a step-by-step plan for fundraising campaigns. Offers tools for forecasting the amount of money needed, building a case, creating communication pieces, identifying and evaluating key individual and institutional prospects, planning for cultivation, and monitoring progress. Call Number: 710 SCH

Seltzer, Michael. *Securing Your Organization's Future: A Complete Guide to Fundraising Strategies* (Rev. edition). New York, NY: Foundation Center, 2001. A step-by-step approach to creating and sustaining a network of funding sources. Discusses major organizational tasks to address before applying for funding; techniques for approaching individuals and institutions for support; how to create a funding mix that succeeds. Information for the Foundation Center's class "Introduction to Fundraising Planning" is taken from this book. Chapter 22 "Choosing the Funding Mix" is available at foundationcenter.org/getstarted/onlinebooks/seltzer/text.html Call Number: 710 SEL REV

Warwick, Mal. *The Five Strategies for Fundraising Success: A Mission-Based Guide to Achieving your Goals*. San Francisco, CA: Jossey-Bass Publishers, 2000. Organized into four parts to guide development professionals in choosing the "right" fundraising approaches for their nonprofits. Part two provides information about strategic planning processes to set objectives and goals. Part three demonstrates how to choose amongst various fundraising options. Part four introduces benchmarks and evaluation tools. Call Number: 710 WAR FIV

Weinstein, Stanley. *The Complete Guide to Fundraising Management*. 2nd ed. New York, NY: John Wiley & Sons, 2002. A comprehensive treatment of fundraising principles and practices, including information on creating case statements, record keeping, prospect research, grants, major gifts, etc. Call Number: 710 WEI

Case Statements

Ahern, Tom; Joyaux, Simone. *Keep Your Donors: The Guide to Better Communications and Stronger Relationships*. Hoboken, NJ: John Wiley & Sons, 2008. The guide contains a chapter on building a case for support and briefly describes the different types of case statements. Call Number: 743 AHE

Barbato, Joseph; Furlich, Danielle S. *Writing for a Good Cause: The Complete Guide to Crafting Proposals and Other Persuasive Pieces for Nonprofits*. New York, NY: Simon & Schuster, 2000. Practical advice about the art and craft of writing related to fundraising proposals, as well as case statements, newsletters, and other communications devices used by a typical development office. Call Number: 765 BAR

Rehder, Kristin V. "Is Anyone Reading Your Case Statement?" *Currents*, vol. 26, January 2000, p. 15–16. Gives tips on writing more effective case statements that will motivate prospective donors.

Seiler, Timothy L. *Developing Your Case for Support*. San Francisco, CA: Jossey-Bass Publishers, 2001. Seiler explains how the case statement is related to the overall fundraising efforts. He outlines the steps involved in establishing the components of the case, which includes goals, mission statements, finances, etc. Explains how the case is used. Call Number: 710 SEI

Mission Statements

Angelica, Emil. *The Wilder Nonprofit Field Guide to Crafting Effective Mission and Vision Statements*. St. Paul, MN: Amherst H. Wilder Foundation, 2001. A how-to guide that explains the process for developing both mission and vision statements. Call Number: 680 ANG WIL

Grace, Kay Sprinkel. *The Nonprofit Board's Role in Setting and Advancing the Mission*. Washington, DC: BoardSource, 2002. Discusses the importance of an organization's mission, vision, and values. Describes how to develop a mission statement, explaining how it guides an organization's decision making, advocacy efforts, and board recruitment. Call Number: 610 BOA GOV Book 6

Fundraising Techniques

Bray, Ilona. *Effective Fundraising for Nonprofits: Real-World Strategies That Work*. Berkeley, CA: Nolo Press, 2005. This handbook covers the various tools in a fundraising arsenal, including planning, soliciting individual donors, mounting special events, creating and sustaining earned income, and securing foundation and corporate grants. Call Number: 710 BRA EFF

Ciconte, Barbara L.; Jacob, Jeanne G. *Fundraising Basics: A Complete Guide*. 2nd ed. Gaithersburg, MD: Aspen Publishers, 2001. Provides a thorough treatment of the fundraising effort, from establishing a philanthropic environment to working with consultants. Includes worksheets and appendices. Call Number: 710 CIC

Greenfield, James (ed.). *The Nonprofit Handbook: Fundraising*. 3rd ed. New York, NY: John Wiley and Sons, 2001. The compilation provides contributions from numerous experts who share information on the entire scope of fundraising. An encyclopedia of fundraising techniques. Call Number: 700 GRE NON 2001

Klein, Kim. *Fundraising for Social Change*. 5th ed., rev. and expanded. San Francisco, CA: John Wiley & Sons, 2007. Explains community-based fundraising techniques for small nonprofit groups. Recommends fundraising strategies that have been successful for low-budget groups. Call Number: 710 KLE 2007

Klein, Kim. *Fundraising in Times of Crisis*. San Francisco, CA: Jossey-Bass Publishers, 2004. Klein asserts that nonprofits are in a very unusual situation, probably of long duration, and provides guidance on pursuit of specific techniques for the next year, as well as longer-term strategies. Call Number: 710 KLE CRI

Rosso, Henry A.; Tempel, Eugene R. (ed.) *Hank Rosso's Achieving Excellence in Fund Raising*. 2nd ed. San Francisco, CA: Jossey-Bass Publishers, 2003. Comprehensive coverage of successful and ethical fundraising principles, concepts and techniques. Call Number: 710 ROS ACH

Web Resources

Free Management Library: Nonprofit Fundraising and Grantwriting (managementhelp.org/fndrsng/np_raise/np_raise.htm) Includes articles on many topics such as the board and fundraising and fundraising fundamentals.

Fund-Raising Forum Library (raise-funds.com/library.html) Wide variety of free articles available, including a category on "Planning for Fund-Raising."

Grassroots Institute for Fundraising Training (grassrootsfundraising.org/index.html) On the website of the popular journal you can read selected articles from the Grassroots Fundraising Journal, browse through the Q & A column, and sign up for the free e-newsletter.

Society for Nonprofit Organizations: Fundraising Guide (snpo.org/funding/index.php) Includes a questionnaire, "Are You Ready for Fundraising?"