



# FUNDRAISING MAGNIFIED



A Workshop by

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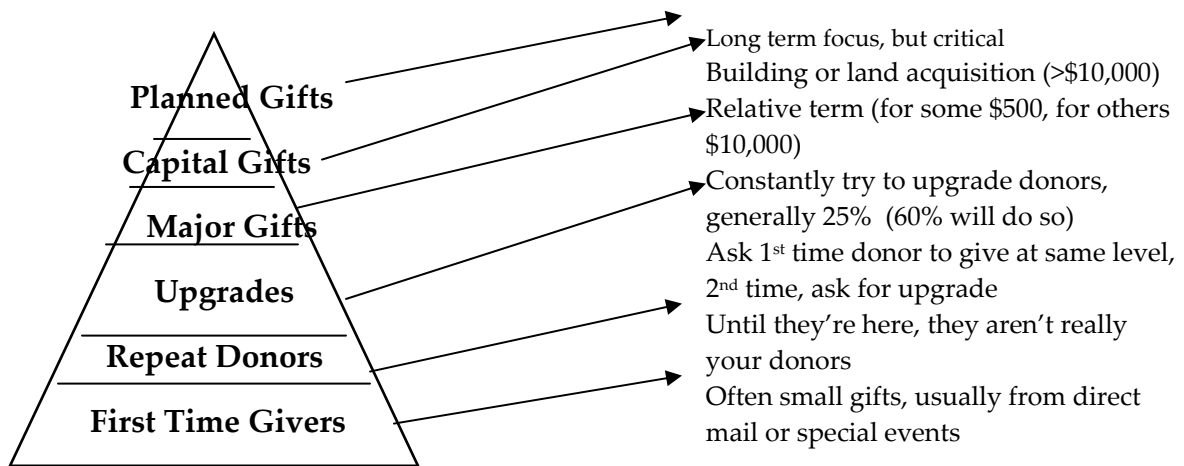
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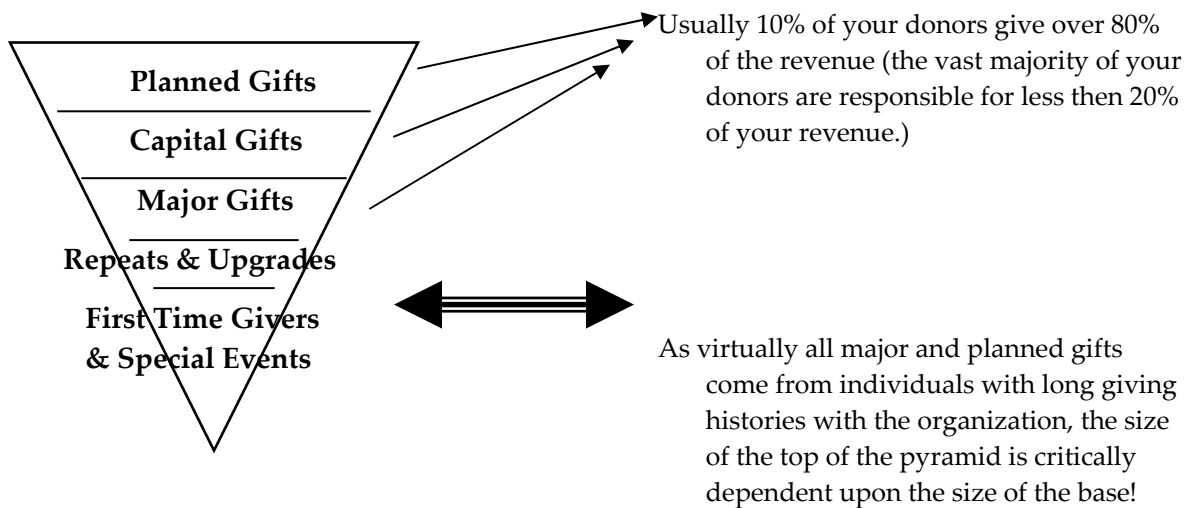


WASHINGTON STATE  
ARTS COMMISSION

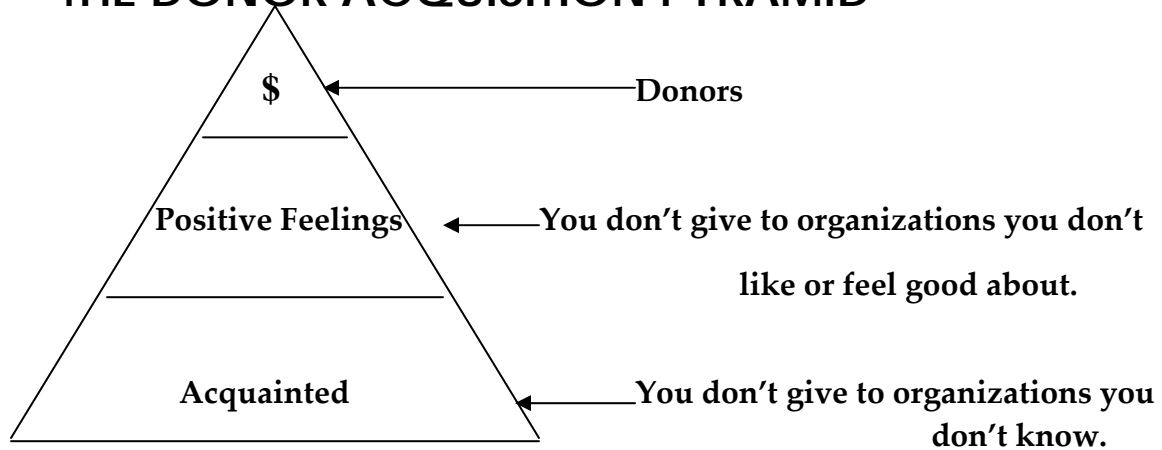
## THE DONOR PYRAMID



## THE REVENUE PYRAMID

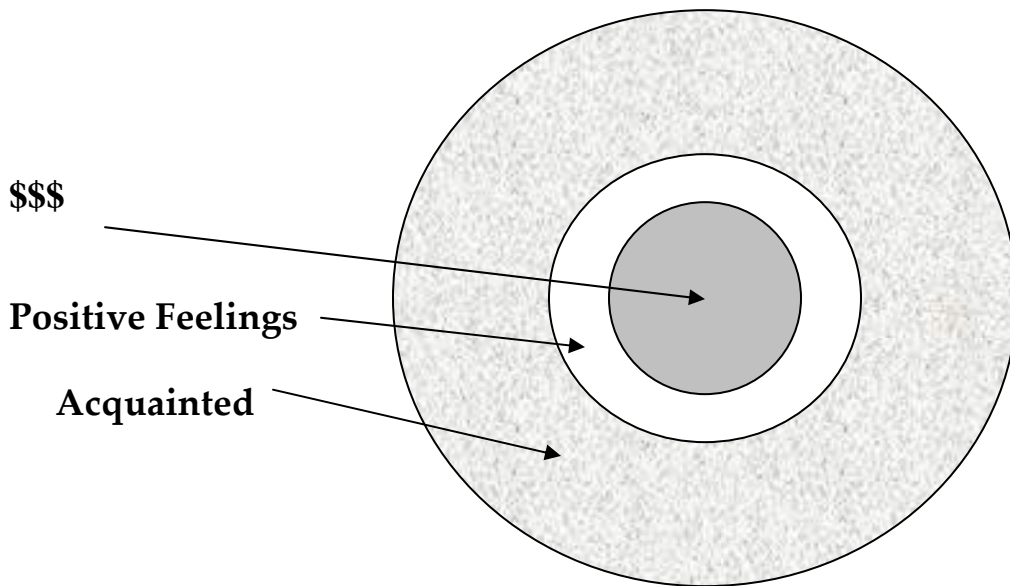


# THE DONOR ACQUISITION PYRAMID



OR

# THE DONOR ACQUISITION CIRCLE



OR

# THE DONOR MATRIX

K N O W	X	XX	Know/Don't Care	Don't Know/Don't Care
	XX	X	Know/Care	Care/Don't Know
	CARE			

The following materials were supplied by consultant extraordinaire,  
**Florence Green & Associates**  
**(310) 828-0999**

*For organizational and management excellence.*

Thanks to her for the use of these materials.

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## HOW TO START A FUNDRAISING CAMPAIGN

Do the **RESEARCH**.

Set the **GOAL**.

Determine the **STRATEGY**.

### **FOLLOW THROUGH.**

**RESEARCH:** Evaluate your organization and everything that affects it; the economy, the competition, your agency' strengths and weaknesses, giving trends, your volunteer force, your capitalization, the probably future of your funding sources, etc.

**GOAL:** There should be two kinds of goals –short term (from 6 months to 2 years) and long-term (from 2-5 years). Goals should be set high enough so that an organization must make a substantial effort to attain them, but they must not be set so high that they can't be reached. You will need an overall goal and then break out smaller goals for each fundraising activity.

**STRATEGY:** You know where you are, and you know where you want to go. Strategy is the drawing of the road map that will guide you in traveling from here to there. How much will you spend on each campaign? Will you increase the size of your membership? Should you take on a new special event? Should you start a business activity? There are hundreds of strategies an organization can set down as the path of the future.

**EXECUTION:** This is the carrying out of the strategy you decided on. Were your public relations effective? Did you use the right volunteers? Are the information and campaign materials packaged properly?

Evaluation of the success of your campaign is really part of step one: **RESEARCH!**  
Circle back, refine, and continue.

As you can see, it is really up to you to design a strategy that works for you. Consider you (1) need, (2) resources available to fundraise, and (3) potential sources of support as a guide to shaping the campaign.

## BASIC PREPARATION

1. Know who constitutes community leadership – political, economic and social. Ascertain the influence structure within the community those people who may not necessarily make the final decisions but can sway the outcome in your favor. This information could also assist in involving the community leadership on your board.
2. Know the economic base of the community: is there a mixed industrial base?; what is the primary industry?; are decisions made at local level or deferred to the company office? List the local companies and find out what their current profit picture (and their current giving profile.)
3. Find out the existence of family or corporate foundations within the community.
4. Know the demographic makeup of your community – age, education, income level and ethnic origins. Try to gauge community involvement and levels of individual giving by looking at what happens with other agencies as well as your own.
5. List service clubs operating in your community what types of activities they support. Make arrangements to send speakers throughout the year to tell YOUR ORGANIZATION's story.
6. Find out and be aware of all other fund raising endeavors by other organizations to avoid conflict.

**FUNDRAISING GOAL IS \$ \_\_\_\_\_ per year.**  
*Fundraising year runs from \_\_\_\_\_ each year.*

<u>Methods</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>
Corporate Contributions	\$10,000		
Foundations	\$50,000		
Service Clubs	\$ 5,000		
Individual and Memorial Gifts	\$40,000		
Earned Income	\$ 4,000		
Gift Club	\$15,000		
Major Event	\$50,000		
Second Event	\$20,000		
<u>Direct Mail</u>	<u>\$ 6,000</u>		
Fundraising Total (1)	\$200,000		
Fundraising Costs (2)	\$40,000		
(20% of total)			
<b>Actual Amount to be Raised</b>	<b>\$240,000</b>		

1. Some part of each year's fundraising income should be put into a reserve fund. It can be as small as 10%. It is essential that your organization build the saving habit. The reserve can be the beginning of an endowment campaign.
2. The first year's goals are speculation only. Specific goals for the second year should be planned after you organization begins to see how close it is to the speculations listed above.
3. Each fundraising activity must bring in 20% over its goal so that fundraising costs begin to be included in the cost of raising money. Always plan to "pay back" the costs of fundraising.

#### 4. FUNDRAISING STRATEGY/PLAN

Do Each Step From The Bottom Up

(Sometimes called the "Ladder to Fundraising Success")

MAKE CHANGES FOR NEXT YEAR

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WHAT DID YOU LEARN?

---

EVALUATE RESULTS

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THANK, REWARD, ACKNOWLEDGE EVERYONE

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IMPLEMENT SOLICITATION METHODS

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TRAIN VOLUNTEERS

---

EXPAND DEVELOPMENT COUNCIL WITH FUNDRAISING VOLUNTEERS

---

DEVELOP FUNDRAISING MATERIALS

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DEVELOP FUNDRAISING MARKETING PLAN

---

IDENTIFY PROSPECTS

---

REDO CASE STATEMENT, IF NEEDED

---

FEASIBILITY STUDY

---

FIRST CUT AT CASE STATEMENT

---

ORGANIZE CORE DEVELOPMENT COUNCIL

---

SET FUNDRAISING GOALS & GIFTS TABLE

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SELECT SOMEONE TO BE RESPONSIBLE FOR FUNDRAISING

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(i.e. hire Fundraiser, Consultant or identify Board/Staff/Volunteer LEADER/ ORGANIZER)

ASSESS INDIVIDUALS, YOUR ORGANIZATION AND THE COMMUNITY

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BOARD/STAFF COMMITMENT TO FUNDRAISE

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IDENTIFY SHORT TERM FUNDING NEEDS

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IDENTIFY LONG TERM FUNDING NEEDS

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## DEVELOPMENT COUNCIL OR FUNDRAISING COMMITTEE

The purpose of a Development Council or a Fundraising Committee is to provide the agency with the financial support it needs. The council or committee acts as an ad hoc fundraising committee. Having a fundraising committee does not relieve the Board of their fundraising responsibility. It does, however, expand the number of people doing that task and it lets the fundraising activity be a priority rather than a sideline.

The Development Council should be made up of community people, Board members, staff, parents of clients, volunteers. They should be invited to be on this committee because of their experience in raising money in the community. When they are invited to be on the committee they should be honestly told what would be the expectations.

It will be necessary to provide them with staff support. Do not let them become defeated by the "go-fer" work. Provide a staff person, preferably the fundraiser you plan to hire, to do those details things and let the committee do the fundraising. Yes, it will be hard, difficult work for the staff person and it is how the fundraising. Yes, it will be hard, difficult work for the staff person and it is how the fundraising will get done. If there are Board members who are willing, able and secure enough to do the task of fundraising, then they should form the core of this committee.

Steps to set up a Development Council:

1. Board approves Development Council concept.
2. Board defines role of Council and role of Board in fundraising. Board will also need to define how the two groups will interact with each other.
3. Board will decide who will be on Council and types of community people they want on Council.
4. Board invites people to be on Council.
5. Board and Council define goals, methods, tasks, and timelines of fundraising activities.
6. People get the training they need to do tasks.
7. Both groups adopt a problem solving process that they agree they will use with one another if things do not go well.
8. Fundraising begins and evaluations of process and results also begin.

# FINANCE COMMITTEE FUNCTIONS

Finance Committee Chair,  
Board Treasurer

Annual  
Audit

Annual  
Budget

Internal  
Accounting  
Systems &  
Controls

Diversified  
Fund  
Development

Endowment

Public Funds

Private Funds

Membership

Special Event #1

Special Event #2

Program Revenue

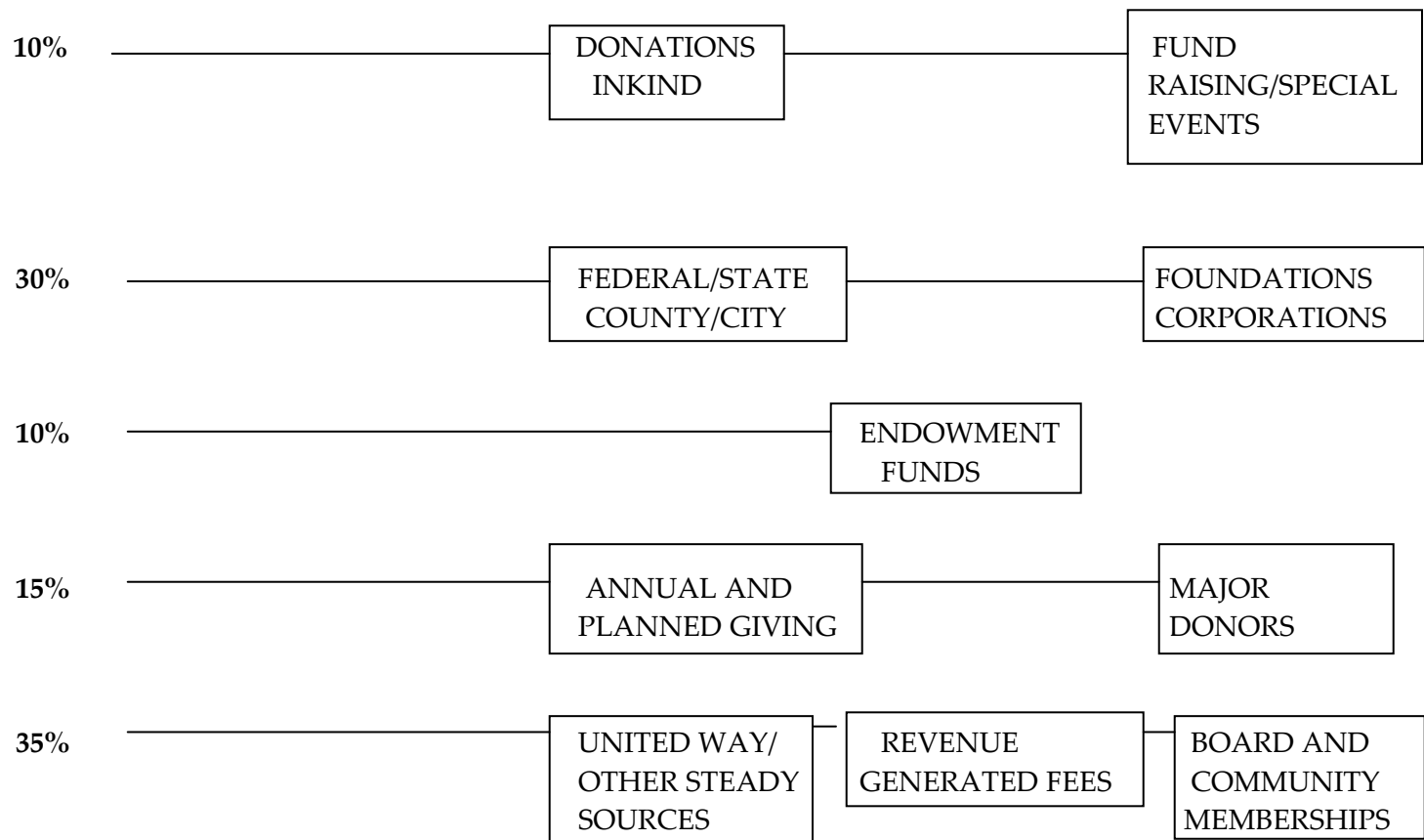
**DIVERSIFIED FUND DEVELOPMENT COMMITTEE**

**Financial Development Committee**

<b>Deferred Giving <i>Task Force</i></b>	<b>Endowment <i>Task Force</i></b>	<b>Public &amp; Private <i>Task Force</i></b>	<b>Individual Gifts <i>Task Force</i></b>	<b>Special Events <i>Task Force</i></b>
<ul style="list-style-type: none"> <li>→ Bequests</li> <li>→ Memorials</li> <li>→ Legacies</li> <li>→ Life Insurance</li> <li>→ Stocks and Bonds</li> <li>→ Land/Properties</li> <li>→ Antiques</li> </ul>		<ul style="list-style-type: none"> <li>→ Corporate</li> <li>→ Grants *Foundation Grants *Government Grants</li> </ul>	<ul style="list-style-type: none"> <li>→ Memberships</li> <li>→ Board Commitments</li> <li>→ Major Donor Program</li> <li>→ Annual Giving Program</li> <li>→ Corporate Sponsors</li> </ul>	<ul style="list-style-type: none"> <li>→ Steak &amp; Lobster Gala</li> <li>→ Auction</li> <li>→ Raffle</li> <li>→ Recognition Dinner</li> <li>→ Fun Run</li> </ul>

## DIVERSIFIED FUND DEVELOPMENT

**Suggested %  
Of Total Budget**



## CONSTRUCTING A GIFTS TABLE

A gifts table projects how many gifts and of what size will be needed to make your campaign successful. It serves as a reality check at the beginning, a table of goals while you are soliciting funds, an indicator of how well you are doing as fundraising progresses, and a valuable evaluation tool.

Mathematical formulas are used to construct the traditional table and these reflect the reality and best practices of professional fundraisers. Generally the “lead gift” (largest gift) is 10% of the total, then each smaller gift is calculated at half the next largest gift but requiring twice the number of donors. **For each necessary gift, you should have 4 (four) SOLID potential donors**, based upon your past fundraising success.

For example:

To raise \$2,000,000 your gift table might look like this:

Type	\$ amount	# of gifts needed	# of prospects	Total
Major Gifts	\$240,000	2	8	\$480,000
	\$120,000	4	16	\$480,000
	\$ 50,000	8	32	\$400,000
Special Gifts	\$ 25,000	10	40	\$250,000
	\$ 10,000	15	60	\$150,000
	\$ 5,000	50	200	\$250,000
General Gifts	less than \$4,000		All others	<u>\$390,000</u>
				\$2,400,000

*Keep in mind that if you want to raise \$2,000,000 you would also need to add \$40,000 or 20% to the budget for fundraising costs.*

Another strategy to be aware of as you plan your marketing and fundraising timelines:

People want to give to a successful campaign. Therefore, it behooves you to have more than 50% of your monies in hand before you announce the public portion of your fundraising. In the example above, you would want to have confirmation of all of your major gift donors (and probably some of your special givers), before you begin to tackle the bulk of the special gifts and general gifts. Success breeds success.

## DIVERSIFIED FUND DEVELOPMENT CALENDAR

RESOURCES	GOAL	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec	TOTAL
Board Commitment	\$													
Membership	\$													
Comm. Donations	\$													
Special Event #1	\$													
Special Event #2	\$													
Corp/Foundation #1	\$													
Corp/Foundation #2	\$													
Annual Giving	\$													
Planned Giving	\$													
Memorials	\$													
Bequests	\$													
Other	\$													
Major Donors	\$													
City Grant	\$													
Federal Grant	\$													
Revenue/Fees	\$													
In Kind Donations	\$													
Endowment Fund	\$													
United Way	\$													
Other	\$													
<b>TOTALS</b>	\$													

# GOING FOR THE GREEN

## (HOW TO ASK FOR MONEY)

### **ASKING FOR MONEY IN PERSON IS THE BEST WAY TO RAISE FUNDS**

because you can raise money in the least amount of time at the least expense. Think about how you feel when someone asks you for a donation to a worthy cause. If the request is reasonable, you are not annoyed. You realize the cause is important and the volunteer is seeking no personal gain. You listen. If it appeals to you, you give; if it doesn't, you do not give.

### **THE SUREST WAY TO ALLAY YOUR ANXIETIES ABOUT ASKING FOR A CONTRIBUTION IS TO PREPARE THOROUGHLY BEFORE YOU MEET YOUR PROSPECTS.**

Anyone asking for support must know all the ins and outs of the project and be able to answer any of the prospects' questions. Think through and rehearse the answers to tough questions with your colleagues **BEFORE** you approach the prospect.

Research your prospects and know your organization. Have a good idea of the prospect's interests, involvement, and the amount they give to other organizations or issues they support.

**WORK IN PAIRS IF YOU LIKE.** Remember, peer-to-peer requests are clearly the most effective. Staff members are the best expert witnesses about the agency. Board members are the best community support for the agency. A good team is one Board member or volunteer and one staff person.

### **PREPARING TO ASK**

1. Before you ask please check the name of your prospect with the fundraising chair or the development direct/council chair. If the committee has already evaluated the prospect, you will want to fit your solicitation with the recommendations of the committee. If the prospect has not been evaluated and/or targeted by the fundraising committee, please let the fundraising chair know when and how you plan to ask and how much you plan to ask for.
2. Take time to think through your presentation **BEFORE** you make your appointment with the prospect. What does the prospect care about? Why would he or she be interested in helping your organization? What else do they give to?
3. Write your strategy out on a yellow pad and then role-play your request with a friend or with one of the fundraising staff. Get feedback regarding your presentation style. Another idea is to have a group practice that is videotaped, so that everyone, including you, can review and comment on your presentation.
4. **PEOPLE GIVE TO PEOPLE.** The Case Statement is a tool for you to use. It cannot ask by itself. Trust your self to do a good job. As for the largest gift that is realistic for this prospect. As another Board member to go with you if that will help you feel more comfortable.

## ASKING FOR THE DONATION

1. Identify whom you will ask.
2. Think through how you will approach them. The best approach is to role-play with two other people before you go. Use the information you have written about this prospect. Have one person be the asker, one the “askee” and the third should be the observer. As them to notice how your body communicates as well as to listen carefully to how you ask.  
  
Practice more than once if you still do not feel comfortable. Your intention is to get a yes. The best way to do that is to prepare, practice and follow through.
3. Handle your resistance and fear. The best way to do this is to go in pairs.
4. Let the Committee Chair or the fundraising staff know whom you are asking. Let them know how they can help you.
5. Set up an appointment. You may wish to send the Case Statement or other information about the organization ahead of the meeting with a letter confirming your appointment.
6. A half-hour meeting is plenty. Anything over an hour is much too long. Home, office or lunch is best (you pay for all parties.)
7. Show up at the meeting.
8. Spend only two or three minutes in friendly chatter or small talk before you settle into your presentation.
9. Tell the donor why you are meeting with them. Tell them why you think they care about what the organization is doing. You are asking them to become a partner with a fine organization. Remember you are there because the prospect is a good friend and/or has shown some interest in the things the agency is about. It is a compliment to them and to you that you are both meeting together to talk about the work of your agency.
10. YOU DO NOT HAVE TO APOLOGIZE OR FEEL GUILTY BECAUSE YOU WANT TO INVOLVE THIS PROSPECT IN THE GOOD WORKS OF YOUR ORGANIZATION!! IT IS AN OPPORTUNITY YOU ARE OFFERING, not a fate worse than death! Sincerely praise the prospect for their past involvement in the city, with the agency, with another organization, with their family, etc.
11. Make your presentation. Keep it to 10 to 15 minutes. Answer questions candidly. Encourage the prospect to ask questions. Encourage a dialogue.
12. Be open and sincere about your request. Your personal belief in the benefit of your organization’s programs is extremely important. Show how much you care.

13. Ask for a specific amount. Work with the fundraising committee to determine the right amount. **ASK FOR AS HIGH A GIFT AS SEEMS REASONABLE FOR THIS PROSPECT.** Do not be afraid. The donor can always offer less.
14. Ask for an immediate commitment. The donor may pledge over a three-year period (or whatever period the fundraising committee has designated). Ask the donor to fill in the pledge card. Only as a last resort should you leave the pledge card with the prospect.
15. Within 48 hours, send a handwritten thank-you note, even if the prospect was negative. Send a thank-you note even if you know they will receive a formal not from your organization.

**BE WILLING TO STRETCH THE PROSPECT AND YOURSELF.**

**It is difficult to ask if you have not given. Make your own commitment to the organization before you ask others. Practice putting in words why YOU are involved with this organization and why YOU have given.**

**People give to people. Let your love and care for the agency and the clients you serve show through your request.**

**Be proud of your involvement with this agency and what the agency has done in the community.**

Remember

**People Give To People  
and  
Always Get to Yes**

## ADDITIONAL THOUGHTS ON PERSONAL SOLICITATION

1. Before approaching a prospect, make sure that you can justify all of the gifts (money, time, sacrifice) that you ask for.
2. Before you ask others for a gift, give your own gift.
3. Aim for permanent support
  - Declining today does not close tomorrow's door.
  - If you fail, withdraw cheerfully and graciously. Make the prospect a friend forever.
4. Maintain a positive attitude throughout the interview.
5. Dress well. Appearance is a yardstick some use to measure.
6. Provide yourself with a business card. Your title is important. Gift size is often tied directly to perceived importance of the solicitor.
7. Let the prospect talk freely and naturally. This will reveal more of the interests/peculiarities not uncovered by research.

# APPENDIX

**The following information was adapted from the work of  
Organizational Consultant  
Marcia Williams**

Many thanks to her for the use of this information.

## **DIVERSIFIED FUND DEVELOPMENT TERMINOLOGY**

### **Diversified Fund Development:**

Diversified Fund Development is the overall planned financial development of your organization to ensure the continued operations and financial stability. It should take a balanced approach between: private/public dollars; corporate/foundation grants; an endowment fund; bequests and memorials; annual giving; planned giving; major donor program; memberships; board commitment; program fees and revenues; fund raising activities/events; community donations; and United Way or other semi-permanent income sources.

### **Public Dollars:**

Those dollars received as a result of grants written to governmental entities, i.e., State, County, City, Regional, Federal governments or contracts with these entities.

### **Private Dollars:**

Those dollars received as a result of grant/proposal writing to corporations or foundations, both local and national, that have been tied to specific project, i.e. counseling services for youth, new buildings, specific events such as a festival, general support, etc. Private dollars can also be community donations of cash or in-kind supplies or equipment.

### **Endowment Dollars:**

Those dollars received to perpetuate the existence of the organization. Generally these dollars are left in total (the principal) with only a percentage of the interest being removed for operations. This allows the endowment fund to increase slightly each year. An endowment fund is enacted by Board action. They set the amount of interest to be removed each year and how much is to be added to the principal. An organization can go to corporations and/or foundations to begin or add to an existing endowment fund. Other ways to increase the fund are through bequests and memorials.

**Bequests:** From wills or trusts, provision related to the distribution of a person's assets or the liquidations of those assets. They could come from stocks/bonds, property, life insurance, household goods, antiques, etc. that are bequeathed directly to the organization. The mechanism to encourage bequests is through a planned giving program.

**Memorials:** Are frequently noted in a person's obituary, i.e. "in lieu of flowers" the family suggests contributions be made to the XYZ organization. Memorial contributions can be in the name of someone, with the purpose not necessarily specified in a notice. If no purpose is specified, funds can be placed in the endowment. Or the donor could specify that donations be restricted for some purpose, such as scholarships; this would prevent the dollars from being utilized in the endowment fund.

### **Memberships:**

Some organizations are members of a national organization. Individuals give to them because of their national focus, cause or missions. Examples are the American Red Cross, Big Brothers/Big Sisters, or Boy Scouts of America. They can support the national movement by being a member at the local affiliate/chapter.

Other organizations have memberships with no national affiliation. Often there are benefits to memberships, such as reduced ticket prices. In either case there should be annual solicitation of new memberships and retention efforts of current members.

### **Planned Giving:**

An organized effort to recruit those professionals who have control or authority over wills and trusts – attorneys, accountants, stock brokers, financial planners, insurance underwriters – to include your organization in their presentations to clients to consider your organization as beneficiaries of their investments. Stocks, bonds, life insurance, property, antiques, buildings, acreage, and homes can all be assigned while the client is living, with the interest to the client and the organization receiving the principal in trust. By giving the assets in trust while alive, the organization benefits by being able to use the assets for collateral. The principal and interest revert in total to the organization upon the client's death.

### **Annual Giving:**

A planned financial program whereby people in the community are identified as having a strong financial giving profile and who would be likely donors to your organization. Usually, a specific amount is identified as needed. An example: the goal is a \$10,000 annual giving program. You would need to identify and individually solicit twenty \$500

donors or ten \$1,000 donors. Your goal is to be able to receive this donation each year from those identified. You could increase the financial goal by identifying additional donors at the set amount. Tiered giving amounts can also be identified.

### **Major Donor Program:**

Purpose is to secure operational dollars for the organization on an annual basis through solicitation of a select list of persons. The program usually takes on the physical form of a triangle – one gift at \$5,000, three gifts at \$2,500, six gifts at \$1,000, fifteen gifts at \$500, 25 gifts at \$100, and one hundred gifts at \$50. Major donor campaigns can also address one-time projects such as a capitol building fund, starting an endowment, etc.

### **Program Revenues/Fees:**

Dollars generated by the organization through its programs or services. The revenues could come from flat fees charged, sliding fees, or low cost fees, etc. These can come from ticket revenue, workshop fees, sales in a gift shop, or a variety of other manners.

### **Fund Raising Activities/Events:**

Those special events or activities raise dollars for the organization's operational expenses or for a specific project. The activities or events could be in the form of raffles, auctions, antique sales, bowl-a-thons, leadership award dinners, special performances, fun runs or a huge variety of other ideas. The rule of thumb for most agencies is that if the event is annually raising between \$1,000-\$2,000 then it is actually a "friend raiser" instead of a fundraiser. Many agencies conduct labor-intensive events that only break-even or raise minimal amounts. There are activities and events which – *when properly planned, scheduled and coordinated* – raise annual sums in excess of \$200,000.

### **Board Commitment:**

The trend is to recruit Board members with the expectation that each member will be a financially contributing member towards the operational costs. Some Boards, by consensus, have set monetary expectations; i.e. "\$120.00 per Board member annually" which is shown on the financial/budget statements under Board Commitment. We need to show that our Board commits not only their time and talents but also their money. How can we expect others to contribute, if those closest to the organization (i.e. the Board) have not made a commitment? A grantor is more likely to give to an organization that has a Board commitment and shows the amount of community donations it raises annually.

**Community Donations:**

Those dollars solicited or unsolicited that come directly from the community because of the type of organization you are or the type of programs and services you provide.

**Development Officer:**

A person with specialized skills in raising dollars for organization. This individual should be a member in good standing of either the Northwest Development Officers Association (NDOA) or the National Society of Fund Raising Executive (NSFRE). The latter association also has certification program in fund development so a member of your organization can gain these skills. The Development Officer should have a good balance of skills in all areas unless the organization is large enough to have several professionals in specific fundraising areas.

**Capital Campaign:**

An organized effort to raise large sums of money in a limited time towards the purchase of land, building a building, or renovation and expansion of existing facilities. This is usually done only once or twice in a twenty-five year span.

**In-Kind Donation:**

Donations from individuals, groups, companies or corporations in the form of equipment, supplies, loaned executives or specialists, services or other non-cash contributions. You need to develop systems to record the value of these contributions to your organization, and ways to document the contribution for the donor. In-kind donations are valued at their current "fair market value." The only tricky part is the valuing of volunteer time and services. Some guidelines: A professional accountant who volunteers to be the receptionist on Saturday is valued at current minimum wage (in 2000 in Washington, about \$6.00). If the accountant is providing free accounting services, however, is the fee they charge other customers for similar work. In-Kind services and their value should be recorded monthly and totaled at the end of the year. They should appear on your monthly budget summaries to show that you really value and track the work that is being done. It is also another indication for grantors that your community is supporting your work with their time and services.

# THE CASE STATEMENT

The following typical case statement outline is from the work of Frantzreb, Pray, Ferner and Thompson. Use it as a checklist to create the perfect document for your organization.

*Preface or Summary* (this section should express the essence of the case in one or two pages and state overall goals to be achieved.)

## **I. *Institutional Mission***

- i. Role in society
- ii. Philosophy of purpose
- iii. Mission, goals and program
- iv. Salient factors in its history – heritage and distinctions that have endured
- v. Factors that appeal to
  1. Service users (.those who receive services/benefits from the organization such as students, patients, members, clients, recipients, etc. and their families)
  2. Institutional family
  3. Governing board members and volunteers
  4. Friends and community
  5. Past donors
  6. Potential leadership and financial resources

## **II. *Record of Accomplishments***

- i. Service growth – regular and special programs
- ii. Service users – meeting their needs
- iii. Institutional family
  1. Nature and quality
  2. Role in teaching, research, policy, preservation, collection, services
- iv. Service users/constituents
  1. Further education/services
  2. Careers/specialty goals
  3. Civic leadership
- v. Community service
- vi. Improvements in environment and physical facilities
- vii. Financial growth
  1. Annual operations
  2. Capital – current and endowment
  3. Methods used to finance accomplishments
- viii. Philanthropic support – distinctive gifts and bequests

ix. Where the institutions stands today.

**III. *Directions for the Future***

- i. Distinctions that must continue to endure
- ii. New Directions
- iii. Objectives, curriculum, programs, services
- iv. Service users
  1. Numbers to be served
  2. Nature of constituency
  3. Qualifications
- v. Institutional and administration projected requirements
- vi. Governance projected requirements
- vii. Financial policies
  1. For tuition, fees, charges
  2. For investment management
  3. For business management
  4. For private gifts and grants
  5. For public support
- viii. Physical facilities
  1. Campus/environment
  2. Buildings
  3. Equipment

**IV. *Urgent and Continuing Development Objectives***

- i. Priorities and costs
  1. Endowment for
    - a. Service users
    - b. Professional staff/faculty, physicians, curators
    - c. Library/equipment restoration
    - d. Laboratories/service units
    - e. Operation of buildings
    - f. Facility maintenance
  2. New buildings
  3. Redevelopment of present facilities
  4. Property acquisition
  5. Debt reduction
- ii. Master plan

**V. *Plan of Action to Accomplish Future Objectives***

- i. Goals
- ii. Programs
  1. Support current operations
  2. Support capital expansion
  3. Support special programs or projects
  4. Role of estate planning

- iii. Organization
- iv. Timing
- v. Resources
  - 1. Constituent sources
  - 2. Range of gifts needed – gift table
  - 3. Opportunities for memorials and tributes
  - 4. Methods of giving, including planned gifts and deferred giving

**VI. *The Institution's Sponsorship***

- i. Membership of the governing board
- ii. Membership of the development groups
- iii. Church/government sponsorship

These materials are useful for Boards to assist with their planning for the total agency as well as for the Fundraising efforts.

\*\*\*\*\*

**The following materials were supplied by consultant extraordinaire,  
Florence Green & Associates  
(310) 828-0999**

*For organizational and management excellence.*

Thanks to her for the use of these materials.

\*\*\*\*\*

## LONG RANGE AND STRATEGIC PLANNING OUTLINE

The basic steps of a Long Range Strategic Plan are listed below. It is best if you can involve board, staff, management and significant volunteers and clients in your planning process. Your organization will need to decide which of those steps it wants to include in its planning process.

- A. Define the need, problem or value that caused the organization to come to be.
- B. Define the mission of your organization. (Why are you in business.)
- C. Strategic planning steps: (Not all of these questions will be related to each organization. Strategic questions need to be based on the unique needs and circumstances of your organization. If we decide to work together we will need to determine which of these questions are relevant and what other issues need to be explored. This information is usually gathered prior to the planning retreat).

### 1. Internal Analysis:

- a. What are mandates/givens that shape what your organization can and cannot do. What are the limitations, possibilities created by the mandates? What are implications of the mandates to this planning process?
- b. What attitudes, actions, ways of being shape the culture of your organization? What are the unwritten values, organizational principles and organizational culture of your organization? How will that culture impact your ability to implement the plan?
- c. What are the strengths and weaknesses within of your organization? Which strengths, which weaknesses will have the greatest impact on your organization? What are the implications of strengths, weaknesses to the plan? Consider the following areas:

- (1) Program and services
- (2) Funding
- (3) Management/Administration
- (4) Relationship with vendors and/or funders
- (5) Staff
- (6) Compensation
- (7) Position in market place
- (8) Marketing
- (9) Public relations
- (10) Image
- (11) Planning
- (12) Internal communication

2. External Analysis:

- a. Who is your constituency: What do they want and/or expect from your organization? What do you want from them? How is your organization meeting their expectations? How are they meeting your expectations? What will they want from your organization tomorrow? How must you be responsible? What are implications to for your long range plan?
- b. What external trends and changes might have an impact on your organization? Which items will have the greatest impact on your organization? Which are threats, which are opportunities for your organization? What are implications of these changes, trends and impacts to your organization?
  - (1) Political
  - (2) Economic
  - (3) Technological
  - (4) Demographics/social
  - (5) Funding
  - (6) In our profession
  - (7) Education
  - (8) Media
- c. Competitive analysis. Who is competition? Where do they have an edge? Where does your organization have an edge? Where are their strengths and weaknesses? What is the implication for your organization?

3. What is your vision for the future? (What do you hope to become.)
4. What critical issues must your organization address in its plan?

D. Long Range Planning: (Some of this information will be gathered through a retreat involving Board, staff and strategically important volunteers and others.)

1. Identifying strategies

- a. Goals: (Long term future desired outcomes and/or future desired states.)
  - b. Critical issues that are problems you must solve or want to solve. (Define problem carefully.)
  - c. Processes and/or procedures you want to put into place.
2. Objectives (Short term desired outcomes that are specific, measurable, time limited and achievable.)
  3. Work plan (Tasks, activities, programs, services to accomplish objectives. Listed by who does what, when.)
  4. Resources needed to achieve objectives. (People, equipment, facilities, etc.)
  5. Budget for plan.

E. Implementation plan (Strategy for implementing plan into general day to day activities?)

1. Where will financing and/or funding come from?
2. What problems or resistance might come up when you implement the plan? How might we overcome the resistance? How will you resolve the problems? What do you need to do to make sure the plan is implemented?
3. How will plan be evaluated on an on-going basis? On yearly basis? How will you make changes to the plan if and when needed? What might be the criteria for changing course/direction?
4. How will you evaluate the planning process? What do you need to change for next year? How will you evaluate objectives and goals? What will you do with the information?

## GOALS

- A) Goals should help achieve the mission and vision.
- B) Statements should be based on evidence gathered about threats and opportunities and agency strengths and weaknesses.
- C) Goals should narrow your field of endeavor.
- D) Involve everyone in process of identifying goals.
- E) Goals are not specific or time related.
- F) Goals require commitment by entire organization.
- G) Goals should "Fit" the internal values and culture of the organization.
- H) Goals must be understood and agreed to by all if they are to be fulfilled.
- I) Common commitment to goals increases performance level.
- J) Goals should be value based.

## OBJECTIVES

- A. Must be specific approach to achieve mission of agency
  - 1. Must be realistic
  - 2. Must be measurable (quantitative not qualitative terms)
  - 3. Must have a date for completion
  
- B. Consensus and commitment to achievement is essential
  - 1. Who will do it?
  - 2. Who is ultimately responsible for the objective?
  
- C. An objective is a future desired state (not a process)
  - 1. To increase ....
  - 2. To decrease ....
  - 3. To reduce ....

## ACTION STEPS TO ACCOMPLISH THE OBJECTIVES

- A. Brainstorm tasks and activities that must be done to accomplish objectives
  - 1. Task is a procedure or process, completed at a certain time, carried out by personnel, as part of the strategy to achieve the objective.
  - 2. Activity is specific action, procedure, process that is part of a larger activity.
  
- B. Use yellow stickies to plan
  - 1. Brainstorm
  - 2. Group into categories
  - 3. Sequence into chronological order
  - 4. Determine tasks and activities
  
- C. Determine resource needs
  
- D. Assign responsibility
  
- E. Assign time-line
  
- F. Review strategies
  - 1. Is it appropriate to organization's purpose?
  - 2. Given size of problem or goal, will this strategy make a difference?
  - 3. Effective: with this strategy can we reach objective
  - 4. Efficient: how costly is strategy compared to result
  - 5. Side effects: what other effects

# ACTION PLAN

**Objective:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Responsible:** \_\_\_\_\_

**Objective Completion Date:** \_\_\_\_\_

Who	What	Date
-----	------	------

# LONG RANGE/STRATEGIC PLANNING PRESSURE POINTS

## PRESSURE POINTS

## RULES OF THUMB

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- |                     |  |
|---------------------|--|
| 1. Getting Started  | <ul style="list-style-type: none"><li>* Use a planning process that fits agency style</li><li>* Define the process and time frame</li><li>* Find capable leadership</li><li>* Organize the planning team</li><li>* Manage the planning process well</li></ul>  |
| 2. Staying on Track | <ul style="list-style-type: none"><li>* Find the best vision, get it on paper, then tune it</li><li>* Focus on critical issues</li><li>* Look for best fit between mission values and goals</li></ul>  |
| 3. Process          | <ul style="list-style-type: none"><li>* Plan ahead</li><li>* Focus the discussion</li><li>* Stay on track</li><li>* Remain open to serendipity</li><li>* Check progress regularly</li><li>* Model desired behavior</li><li>* Use time between meetings to further clarify vision, goals and strategies</li></ul> |
| 4. Participation    | <ul style="list-style-type: none"><li>* Involve organization leaders</li><li>* Involve those who will implement the plan</li></ul>   |
| 5. Planning Methods | <ul style="list-style-type: none"><li>* Let critical issues dictate planning methods</li><li>* Keep the process simple and emphasize imagination rather than blind adherence to planning steps</li><li>* Use a few aids to stay focused: planning model, worksheets, format</li></ul>                            |
| 6. Remember         | <ul style="list-style-type: none"><li>* Long range and strategic planning is a way of thinking – your plan is never perfect or complete</li><li>* Long range and strategic planning is not an end in itself – simply a tool to aid in accomplishing your mission</li></ul>                                       |

# FINANCIAL MANAGEMENT RESPONSIBILITIES

The financial management of the organization is usually done by the Finance committee. The committee should perform on-going financial monitoring, assuring the board that all legal financial responsibilities are being carried out, file IRS and state forms and recommend new fiscal policies.

Financial management can be divided into three areas of responsibility:

1. Financial Management, which includes:
  - a. preparation of guidelines for budget development
  - b. work with staff on budget development
  - c. analyze budget recommendation critically
  - d. compare actual expenditures with budget allowances
  - e. ensures compliance with all financial regulations and funding sources
  - f. arranging for an annual independent audit
  - g. reviews and determines if financial reporting system used by the agency is adequate
  - h. makes recommendations for improvement of financial reporting system
  
2. Asset Management
  - a. establishes guidelines for investments
  - b. knows all sources of income
  - c. all contracts are in order
  - d. grant stipulations are met
  - e. ensures that all assets are insured
  - f. ensures that all assets are known and accounted for
  - g. maintains bank accounts in proper manner
  
3. Resource Development
  - a. ensures that adequate resources are available to meet agency's program requirements
  - b. can establish separate fundraising, development and/or membership committee
  - c. develops a fundraising budget
  - d. monitors resource development campaigns to see that are conducted in an effective and efficient manner
  - e. annually reviews sources of agency funding
  - f. seeks alternative funding sources to maintain a stable and growing funding base
  - g. works closely with public relations people

## APPENDIX 2

These materials are from the Grants writing Workshop that Bitsy Bidwell presents around the state. They are useful as a tool for developing the materials in your CASE STATEMENT for fundraising!

### GRANTSWRITING, AN OVERVIEW

#### IN A NUTSHELL

Grant writing is a process that should proceed in the following order:

1. Know in detail:
  - What you want to do
  - How you plan to do it (and where, and when, and with what materials, equipment, etc.)
  - Why you want to do it
  - How you will know when it is done, and how you will know how well it is done
  - What results and impacts you expect from it (to your career, to the public, to a cause, etc.)
  - What factors give you a reasonable chance of success (your skills, previous experience, etc.)

2. Research potential funding sources and other resources

\*\*\*\*\*KNOW YOUR IDEA; THEN FIND THE MATCHING RESOURCES [NOT THE OTHER WAY AROUND!!]

3. Write and submit your funding request, whether a fundraising letter, a grant to a public or private agency or a letter request, or whatever.

#### Before We Begin.....Some Definitions

For the purposes of this workshop an **Organization** is:

1. A group of people working together to accomplish a common purpose or achieve an end result. This group can be formal, informal, incorporated or not. Individual members of the group accomplish particular tasks.
2. A single individual working to accomplish a purpose or achieve an end result. This individual will accomplish all the tasks that are done by many in a group.

For example, both individuals and groups must accomplish artistic, marketing, promotional, booking, financial, risk management, and evaluation tasks in producing or presenting any arts product or event. The success of the event or product is a composite of the success of each of these departments. Grant writing is part of the financial portion of the project.

The materials in this booklet, generally, apply to either organizations or individuals. Common sense will assist you in adapting the materials to your situation.

In many cases, an individual will not be eligible for funding and must associate with an organization in order to approach a funding source.

In the U.S., generally speaking, an organization must be a nonprofit, tax-exempt organization to be eligible for funding from either public sources or private foundations.

In Canada, the prohibition about being nonprofit, tax-exempt is not quite as strict. Guidelines from public and foundation funding sources individually clarify their expectations.

## HOMework PHASE

In this phase, you should.....

- define the unique features of your organization and what makes them a genuine contribution to your community
- generically identify who should support your organization and why they should support it and its programs
- clarify and codify what you need to know about your own organization
- describe your own organization
- identify and define your community and/or constituency
- complete the five basic kinds of organizational planning

### **Step One: Organizational Planning - "real time/actual/now"**

Before you even begin thinking about a specific grant, answer each of the following six questions – in writing, no more than one page each – about your *organization*:

1. What is special, or unique about your organization?

2. Who is your community/constituency and what are its characteristics?
3. How does your organization serve this community?
4. Why is it important that your organization serve the community in this way?
5. Why should your organization be supported?
6. Who should support your organization?

***How to Write Your Answers:***

Use no more than four paragraphs to answer each question:

- Paragraph One: Answer the journalistic W 's – who, what, when, where, why how.
- Paragraph Two: Provide clarifying detail.
- Paragraph Three: Provide more clarifying detail, or omit.
- Paragraph Four: Provide an example, an incident, a specific that illustrates the information in paragraph one.

**Step Two: Project Planning - "science fiction"**

Note: All requests for funds constitute a "project" and must be looked at holistically.

Now look at your project and answer - in writing, no more than one page each - the following questions:

1. What do you want funded?
2. What do you expect to achieve?
3. Why is it important to do this?
4. Why is it important for your organization to do this?
5. Why is this project worthy of funding?
6. How do you plan to do this project?
7. Who will be responsible for the project work? Who will be responsible for the money?
8. How will you know how well you have succeeded with this project?

***How to Write Your Answers:***

Use no more than four paragraphs to answer each question:

- Paragraph One: Answer the journalistic W's and an H– who, what, when, where, why, how.
- Paragraph Two: Provide clarifying detail.
- Paragraph Three: Provide more clarifying detail, or omit.
- Paragraph Four: Provide an example, an incident, a specific that illustrates the information in paragraph one.

### Step Three: Funding Plan - "science fiction"

1. What will you need for the project in the following categories? List items:
  - Personnel: paid/volunteer, job titles, amount of time on job, administrative, artistic, technical, salary, benefits....
  - Services: printing, telephone, janitorial, construction, consultants, other contract services...
  - Materials and supplies: office, artistic, construction,.....
  - Space: rental, purchase, storage, performance, office, utilities....
  - Equipment: rental, lease, purchase
  - Travel: lodging, food, parking, transportation,.....
  - Marketing: publicity, p.r., posters, TV, video, design, production....
  - Evaluation: testing, consultants, compiling statistics, printing....
  - Dissemination: reports, mailing....
  - Other: insurance, postage, shipping, freight.....
2. Attach a dollar price to each item you identified above.
  - If you must buy it, list the actual cost.
  - If you already have it, how much of it is devoted to this project, and what is the value of that portion?
  - If it is donated, what would it cost to buy it? That is its value.
  - If it is volunteer time, use the following:
    - ❖ If the volunteer normally does this thing for a of their time is what they would charge other customers.
    - ❖ If the volunteer doesn't do this for a living, the value of their time is minimum wage.
3. Beside each dollar figure put one of the following:
  - C= Money will need to change hands for this item to be provided; this is called **cash**. These items may need to be purchased specifically for the project, may be part of your operating budget, or may already be on hand, but.....your organization actually spent/will spend money on it.
  - I= Donated items; no money from your organization was spent. This is called an **in-kind** donation.
4. Beside each item put another symbol for where the item is coming from:
  - T= You are requesting grant money for this item. T stands for THEM.
  - U= You already have; or will raise, will beg, borrow or badger from some other source - donations, other grants, earned income, etc. - anywhere but Them. U stands for US.
  - T= Grant request**
  - U= Match** (may include both cash and in-kind, depending)  
*You should be aware* that if you break T into several different requests, you must also break U into corresponding segments of match;

the same portions of U cannot be used to match more than one T. Once a portion of U is used to match a request, it cannot be used again to match another request.

NOTE: In "science fiction" project budgets, income always matches expenses. That is, you don't show a deficit or a surplus. Ever. Always!!

#### **Step Four: Research Funding Sources**

The closer you match the desires of the funding source, the greater your chance of funding. To find out the desires of the funding source, do your research homework. Get newsletters, annual reports, make office calls, or attend board meetings.

Keep a data file on funding sources.

Identify sources using:

- Foundation Center Library materials
- State and local arts councils and commissions
- Local and regional funding directories
- State Charitable Trust Directory
- Networking, word of mouth
- Corporations and businesses

#### Proposal Development Phase

Now use the data you have developed in steps one through four to tailor a proposal specifically for your selected funding source, which matches your project.

#### **Step Five: Draft the Proposal** (taken from materials of the *Grantsmanship Center*)

**Summary:** clearly and concisely summarizes the request:

Appears at the beginning of the proposal; but is usually written last

- Identifies the grant applicant
- Includes at least one sentence on credibility
- Includes at least one sentence on problem
- Includes at least one sentence on objectives
- Includes at least one sentence on methods
- Includes total cost, funds already obtained and amount requested in the proposal
- Is brief
- Is clear
- Is interesting

**Introduction:** describes the agency's qualifications or credibility.

- Clearly establishes who is applying for funds
- Describes applicant agency purposes and goals

- Describes applicant's programs and activities
- Describes applicant's clients or constituents
- Provides evidence of the applicant's accomplishments
- Offers statistics in support of accomplishments
- Offers quotes/endorsements in support of accomplishments
- Supports qualifications in area of activity in which funds are sought (e.g. research, training)
- Leads logically to the problem statement
- Is as brief as possible
- Is interesting
- Is free of jargon

**Problem Statement or Needs Assessment:** documents the needs to be met or problems to be solved by the proposed funding

- Relates to purpose and goals of applicant agency
- Is of reasonable dimensions - not trying to solve all the problems in the world
- Is supported by statistical evidence
- Is supported by statements from authorities
- Is stated in terms of clients' needs and problems - not the applicant's
- Is developed with input from clients and beneficiaries
- Is not the "lack of a program" unless the program always works
- Makes no unsupported assumptions
- Is free of jargon
- Is interesting to read
- Is as brief as possible
- Makes a compelling case

**Objectives:** establishes the benefits of the funding in measurable terms

At least one objective for each problem or need committed to in problem statement

- Objectives are outcomes
- Objectives are not methods
- Describes the population that will benefit
- States the time by which objectives will be accomplished
- Objectives are measurable, if at all possible

**Methods:** describes the activities to be employed to achieve the desired results

- Flows naturally from problems and objectives
- Clearly describes program activities
- States reasons for the selection of activities
- Describes sequence of activities
- Describes staffing of program
- Describes clients and client selection

- Presents a reasonable scope of activities that can be conducted within the time and resources of the program

**Evaluation:** presents a plan for determining the degree to which objectives are met and methods are followed

- Presents a plan for evaluating accomplishment of objectives
- Presents a plan for evaluating and modifying methods over the course of the program
- Tells who will be doing the evaluation and how they were chosen
- Clearly states criteria of success
- Describes how data will be gathered
- Explains any test instruments or questionnaires to be used
  - Describes the process of data analysis
  - Describes any evaluation reports to be produced

**Future or Other Necessary Funding:** describes a plan for continuation beyond the grant period or the availability of other resources necessary to implement the grant

- Presents a specific plan to obtain future funding if program is to be continued
- Describes how maintenance and future program costs will be obtained (if a construction grant)
- Describes how other funds will be obtained, if necessary to implement the grant
- Has minimal reliance on future grant support
- Is accompanied by letters of commitment, if necessary

**Budget:** clearly delineates costs to be met by the funding source and those to be provided by the applicant or other parties

- Tells the same story as the proposal narrative
- Is detailed in all aspects
- Projects costs that will be incurred at the time of the program, if different from the time of proposal writing
- Contains no unexplained amounts of miscellaneous or contingency
- Includes all items asked of the funding source
- Includes all items paid for by other sources
- Includes all volunteers
- Details fringe benefits, separate from salaries
- Includes all consultants
- Separately details all non-personnel costs
- Includes indirect costs where appropriate
- Is sufficient to perform the tasks described in the narrative
- Has accurate arithmetic throughout

### **Step Six: Review, Edit, Perfect**

Have an un-informed friend read your proposal, ask questions, and proofread; revise to clarify and perfect

- Carefully re-read the requirements of the funding agency:
- Have you answered all the questions?
- Have you deleted answers to questions that aren't asked?
- Have you supplied all the *requested* attachments and materials? Deleted all unrequested stuff?
- Is it readable; in the proper format; plenty of white space?
- Have you labeled and identified each page and item?
- Are appropriate signatures affixed?
- Have you copied and collated the required copies?

### The Submission Phase

### **Step Seven: Submit**

- Mail required materials by CERTIFIED MAIL, by the postmark deadline. Keep a copy of your dated receipt from the U.S. Post Office.
- Keep a copy of all materials, including the guidelines.
- Make sure the listed contact person can answer all questions, and has a copy of the grant handy to provide responses.
- Keep track of any expected responses; contact the grantor if you do not hear in a timely fashion.

### The Final Phase: Grant Award and Reporting

Once you receive a grant the work is not over! Not only must you complete the project, but:

### **Step Eight: Grant Procedures and Reporting**

- Sign and return any required documents; keep copies
- Carefully review grant application materials and any other materials received after you receive the grant.
- Set up applicable systems to keep necessary information
- Inform personnel of procedures and processes for collecting data
- Regularly monitor data collection
- Inform grantor of any changes:
  - in personnel responsible for project and/or organization, i.e executive officer or project manager
  - address changes for organization
  - budget changes of more than 15%-20% in any given category
  - expansion and/or reduction of project design or timeline

- Send project documentation as project progresses especially if the grantor is named and/or thanked:
  - if grantor is a public agency, send applicable elected officials the same project documentation and cc: the grantor
- Submit requested periodic reports and final reports
  - be honest and accurate; don't gloss over losses or failures, but don't dwell on them, either
  - be timely
  - supply all requested information and data
  - keep all back-up data for a minimum of three years, just in case!

\* \* \* \* \*

## BACKUP INFORMATION NEEDED FOR GRANT WRITING PROCESS

- Clean copy of 501(c)(3) IRS Exemption Letter
- Latest copy of 990 filed with IRS
- Copy of current Nonprofit Annual Report from State of Washington
- Copy of current year budget
- Latest audited financial statement
- Year to date revenues and expenditures
- List of Board of Directors with names, position, affiliations and or employer
- Most recent statistical report
- Most recent Annual Report
- History of the organization
- List of grants awarded in past five years
- Copies of any recent news stories on the organization
- Copies of all program brochures
- Organizational chart
- Staff roster with names, job titles, and business phone numbers
- Copy of Articles of Incorporation and Bylaws
- Copy of Strategic Plan or most recent Goals set my Board

# FUNDRAISING RESOURCES

[www.artsresourcenetwork.org](http://www.artsresourcenetwork.org)

This site is sponsored by the Seattle Arts Commission and has useful links for everyone. Go to "Arts Resources", then the "Business of Art" and finally "Grants" and you will find links to articles, publications, and other resources. Also, link through this site to [www.missionmovers.org](http://www.missionmovers.org) for more help and lists of foundations.

[www.grantwriters.com](http://www.grantwriters.com)

A site just for you with practical help.

<http://www.usd259.com/offices/grants/default.htm>

The Wichita Public Schools have a list of grantwriting articles for you to read.

[www.tgci.com](http://www.tgci.com)

This is the site for The Grantsmanship Center, Inc. with information about their programs and services.

<http://www.foundations.org/>

A service of the Northern California Community Foundation, this site is well-connected to information and resources.

[www.grantstation.com](http://www.grantstation.com)

A subscription service for grant funders research

The Foundation Center

79 5<sup>th</sup> Ave. Department LE  
New York, NY 10003-3076

[www.fdncenter.org](http://www.fdncenter.org)

Has subscription service for grant funders research

Foundation Center Libraries

Seattle Public Library  
1000 Fourth Avenue  
Seattle WA 98104  
(206) 386-4620

[www.spl.lib.wa.us](http://www.spl.lib.wa.us)

Has full foundations on disk.

Redmond Public Library  
15990 NE 85<sup>th</sup>  
Redmond WA 98052  
(425) 885-1861

Has full foundations on disk.

Mid Columbia Library  
Funding Information Center  
1620 South Union  
Kennewick, WA 99336  
(509) 783-7878

[www.mcl-lib.org](http://www.mcl-lib.org)

Has full foundations on disk.

Spokane Public Library  
Funding Information Center  
West 906 Main Avenue  
Spokane WA 99201  
(509) 838-3364

<http://www.spokanelibrary.org/index.php?page=research&cat=findthebest&id=26>

Has full foundations on disk.

United Way of Pierce County  
Center for Nonprofit Development  
734 Broadway  
PO Box 2215  
Tacoma WA 98401  
(253) 597-6686

[www.uwpc.org](http://www.uwpc.org)

Greater Wenatchee Community Foundation (At the Wenatchee Public Library)  
311 Douglas Street  
Wenatchee WA 98807  
(509) 662-5021

Council on Foundations

[www.cof.org](http://www.cof.org)

[www.nonprofit.about.com](http://www.nonprofit.about.com)

A link to over 700 related sites in the US and Canada including extensive articles on fundraising

[www.foundations.org](http://www.foundations.org)

Online searchable database of foundations - a service of the Northern California Community Foundation, Inc. (covers the U.S.)

[www.fundsnetsservices.com](http://www.fundsnetsservices.com)

Online searchable database of foundations – a private service funded by advertising

Americans for the Arts

1000 Vermont Ave N.W.  
Washington D.C. 20005  
(202) 371-2830  
FAX (202) 371-0424

or

One East 53<sup>rd</sup> Street  
New York, NY 10022  
(212) 223-2787  
FAX (212) 980-4857

[www.artsusa.org](http://www.artsusa.org)

Distributes such books as “Guide to Corporate Giving in the Arts”, etc

American Symphony Orchestra League

777 Fourteenth Street, N.W., Suite 500  
Washington D.C. 20005

[www.symphony.org](http://www.symphony.org)

Distributes such publications as “More Dialing, More Dollars” and “Fund Raising and the Nonprofit Board Member”

Arts Extension Service

Division of Continuing Education  
Goodell Building  
University of Massachusetts  
Amherst MA 01003

[www.umass.edu/aes](http://www.umass.edu/aes)

Books: “Fundamentals of Arts Management”, “Going Public”,  
“Community Cultural Planning Work Kit”, Arts Festivals Work Kit”

Business Committee for the Arts

1775 Broadway  
New York, NY 10019  
(212) 664-0600

<http://www.bcainc.org/>

Publishes small brochure format works on such topics as “Guidelines for Arts Organizations Seeking Business Support”

The Grantsmanship Center  
1030 South Grand Ave.  
Los Angeles CA 90015  
[www.tgci.com](http://www.tgci.com)

Philanthropy Northwest – Member Directory  
(formerly Pacific Northwest Grantmakers Forum)  
1305 Fourth Avenue, Suite 214  
Seattle WA 98101  
(206) 624-9899  
<http://www.philanthropynw.org/directory/index.htm>

Washington Charitable Trust Directory  
Office of the Secretary of State  
PO Box 40234  
Olympia WA 98504-0234  
(360) 753-0863  
[www.secstate.wa.gov](http://www.secstate.wa.gov)

The 1998 Washington Foundation Databook edited by Craig McPherson  
C&D Publishing  
1017 SW Morrison  
Portland, OR 97205  
(503) 274-8780

Society for Nonprofit Organizations  
[www.danenet.org/snpo](http://www.danenet.org/snpo)

The Chronicle of Philanthropy – newspaper  
1255 Twenty-Third Street N.W.  
Washington D.C. 20037  
[www.philanthropy.com](http://www.philanthropy.com)

National Center for Nonprofit Boards  
Publications Department  
2000 L Street N.W. Suite 411  
Washington DC 20036  
(202) 452-6262  
[www.boardsource.org](http://www.boardsource.org)

NonProfit Times – newspaper  
190 Tamarack Circle

Skillman NJ 0558  
[www.nptimes.com](http://www.nptimes.com)

National Endowment for the Arts  
Nancy Hanks Center  
1100 Pennsylvania Ave NW  
Washington DC 20506-001  
(202) 682-5753  
[www.arts.gov](http://www.arts.gov)

Cultural Funding from the Federal Government  
<http://www.arts.gov/partner/federal/index.html>

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