

Fundraising Alert

How to Fundraise as a Team

By Amy Eisenstein, ACFRE
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*I*n my role as consultant, I am thrilled to be hiring a development director for an organization

that has never had a fundraising staff member before.

As a fundraising consultant, one of the things I'm always most proud of is when I'm able to help an organization take their fundraising to the next level, and therefore serve more people, open new programs, and generally get closer to fulfilling their mission.

Fortunately, the executive director at this particular nonprofit really gets it. He isn't hiring someone because he no longer "feels like" fundraising. The executive director understands that by hiring a development staff member, he is growing his team and increasing his fundraising capacity.

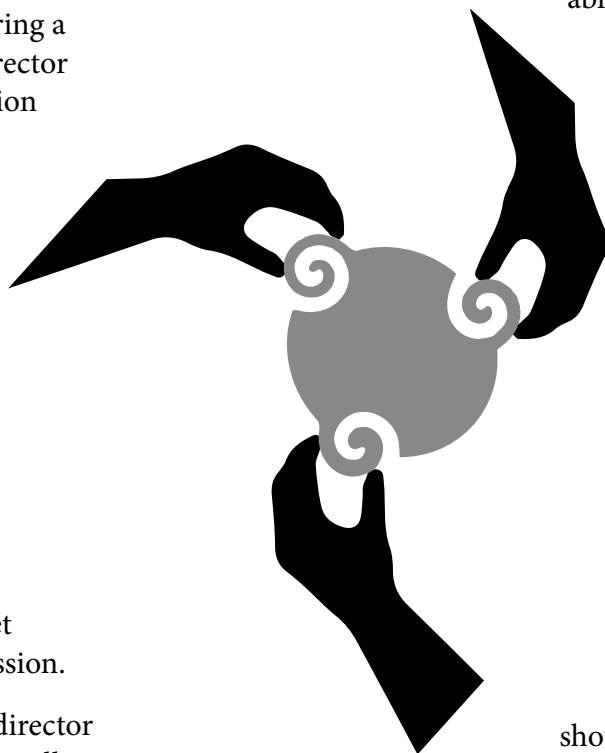
Unfortunately, many executive directors do hire development staff because they don't want to have the fundraising responsibility themselves. However, fundraising is always ultimately the responsibility of the executive director and the board. A great fundraising staff member just enhances the abilities of the board and director to fundraise, but doesn't eliminate the need for them to participate.

Building an Effective Fundraising Team

Fundraising is a team effort. There are separate and distinct roles for each member of the team, which can be blurred, depending on the organization. Here are some best practices for each team member:

Executive Director

The executive director is the face of the organization. She should be visible in the community and communicating her vision to donors, prospects, and community members. She should be meeting with donors and prospective donors on a regular and ongoing basis, and asking them for donations when appropriate.



cont. from page 1

Board Members

Board members are keys to the success of any fundraising campaign and serve as the chief advocates for the organization out in the community. They should be introducing their contacts to the organization, opening doors (making introductions) for the executive director, helping with cultivation, solicitation and stewardship.


Development Director (Staff)

The development director is responsible for coordinating all of the efforts coming out of the development office. The development director should create a plan for raising funds and oversee the implementation of that plan. They should help with training the board, so the team works well together.

Building Your Team

To build your own effective fundraising team, ask yourself the following questions.

- Who is a part of your development team?
- How do you work together?
- Do your board members participate as part of the development team?
- Do you provide training for board members?

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Contents:

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Fundraising Alert

| | |
|---|----|
| How to Fundraise as a Team | 1 |
| How to Ease Your Board of Directors into Fundraising Leadership ... | 3 |
| Twelve Tips for Starting a Fundraising Committee | 5 |
| The Team Approach to Fundraising: The Role of Staff | 7 |
| Volunteer Roles. | 10 |
| Chart of Roles | 14 |

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How to Ease Your Board of Directors into Fundraising Leadership

by Joe Garecht
TheFundraisingAuthority.com

I'm a strong proponent of the notion that a nonprofit's board of directors should be actively engaged in the organization's fundraising efforts.

This means that the board should not only hold an organized board giving campaign each year, but that the board should also help the nonprofit build a fundraising network by opening up their own personal Rolodexes to help the organization grow its prospect list.

That being said, board members don't get involved with nonprofits solely to fundraise. And many board members feel that the nonprofits they serve ask them to go back to the same people for money again and again, which obviously produces diminishing returns.

And frankly, many non-charities recruit board members with the notion that fundraising is only a small part of what the board does, only to change course when a consultant tells them that the board should be far more involved in development than it currently is. When this happens, board members feel shell shocked, and often reluctant.

Self-Inflicted Fundraising Wounds

Much of the fear and anxiety that board members feel about fundraising is caused by nonprofits themselves. So often, Development Directors and Executive Directors approach board members with what I call "fundraising dictates." These dictates usually sound like this:

- "We need you to give us the names of 5 people we can approach for gifts."
- "It's annual gala time. Who can you get sponsorships from?"
- "I want to set up more fundraising meetings this year. Which of your colleagues can I ask for a gift?"

With an approach like that, it's no wonder a board member would be reluctant to share her friends, family, coworkers and business partners with a nonprofit organization. If the charity is that tactless with their own board member, imagine how forward they will be with her contacts!

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Board Fundraising Need Not Cause Anxiety

Asking your board to help you raise more money need not cause anxiety or sleepless nights. The board should see fundraising as a partnership between the development office and the board, as opposed to a competitive venture where the development staff is constantly trying to trick the board into sharing more names or make more asks.

The best way to reduce anxiety is to stop seeing your board as a source of revenue, and start seeing your board as a source of introductions. Sure, your board should directly donate to your organization. And yes... your board should occasionally make asks from folks in their network. But for the most part, your board should be introducing their friends and business associates to your nonprofit, and your organization should be slowly and respectfully walking these contacts down the cultivation funnel.

A Simple Strategy that Works

Many times, when I work with an organization that wants its board to be more active in fundraising, I tell them to try a simple strategy. It will likely work for your nonprofit too.

Pledges and Pedal

Encourage staff and board to leverage their existing activities to benefit your organization. I enjoyed raising money through pledges for a bike ride fundraiser I did last year. It was fun to do something athletic and meaningful and have people rally around me and the cause. I raised about \$2000 for River Network.

~Hilary Arens, River Network Board Member

1

First, at your next board meeting, tell the board that you are changing tactics. You are no longer asking the board to directly ask for money, unless they feel comfortable doing so. Instead, you are asking the board to make introductions to their network.

2

Second, walk the board through your cultivation funnel. Tell them that when they refer someone to the organization, all they need to do is make the introduction (preferably in-person). You will take it from there. You won't ask the person for money during the first meeting or call. You won't ask the person for money during the second meeting or call. Instead, you will build a relationship with them. You will cultivate before you ask.

3

Third, set up a series of non-ask events at your organization. Ask your board members to consider inviting colleagues and associates to these events. Remind your board that you won't ask for money at these events, or during the follow up call. Sure, you will eventually ask for money, but only when the person says they really want to get involved. Build trust with your board.

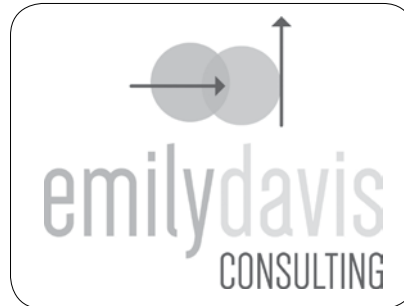
Time and again, I have seen this strategy work with nonprofit boards. Over time (usually 6 months to a year), the board starts to trust the development staff with their friends, family and business associates. They start to make introductions, trusting that the fundraisers won't jump the gun. The nonprofit stops begging for introductions, and earns them instead. 💰

Twelve Tips for Starting a Fundraising Committee

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I'm often asked about steps nonprofits can take in starting a nonprofit Fundraising Committee. Ensuring financial resources for any organization and its mission is of the highest importance. Joining any fundraising committee is an outstanding volunteer job – you shouldn't have to know everything about fundraising to be part of a fundraising committee. The only requirement is a willingness to learn!

Below are some ways that you can start out in organizing a team of volunteer fundraisers for your organizational mission.



committees with communications, activities, reporting, etc.

4 Create and share your fundraising plans.

Every organization should have a plan for their resource development strategies, whether it is a simple or a complex plan. Share that plan with your Fundraising Committee and ask them to provide feedback as well as take specific projects. Review the plan annually and find out what worked well, which goals need to be amended, and what just is not realistic. The plan helps with measurement and evaluation as well.

1 Have a committee description.
How can volunteers know what you need them to do without instruction? Start with a committee description that includes as much detail as possible like committee activities, meeting times and length, preferred skills and qualifications, and any other logistics you would want to know if you were joining the committee.

2 Be clear about your committee name.
The words “fundraising” and “committee” can scare some people away. Another option is to call your committee the “Resource Development Team.” It sends a slightly different message that this is a team of leaders who are leveraging not just dollars, but also resources of all kinds for the mission and cause.

3 Identify board leadership.
One of the best practices in nonprofit leadership is to make sure that your organizational any committees are led by active board members. Board members serve as ambassadors for your organization – both with internal and external networks. Having board members lead committees allows there to be seamless connection between the board and

5 Provide staff support.
Do not expect that you will create a Fundraising Committee and they will magically begin fundraising millions of dollars. Very few people are fundraising experts, so realize your staff is going to be the key to the committee members' successes in many ways. Your staff is on the ground and working with stakeholders every day. Create opportunities for the staff to share and support the committee's efforts. Train staff members how to lead, not just manage, the committee. Leaders breed leaders – this is a great opportunity for staff members to support and engage volunteers in a leadership capacity.

6 Offer education.
Other ways to support your committee is to provide them with in-service trainings or share regular training opportunities through other organizations like your local nonprofit association. Investing small amounts of money in trainings can have a great return on investment in terms of fundraising from your committee members. It also shows a value in the committee members and your appreciation for their volunteer work.

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7 Set the bar high.
Having high standards and asking more than you would expect from your committee is what will set your committee apart from others. You may have a small committee to begin with, but know that you will slowly develop a strong team of fundraisers, strongly committed to your mission and their commitments.

8 Debrief fundraising activities.
This isn't only events (although you should always debrief events), but also includes projects like researching fundraising databases or annual donor appeals. Like any business, nonprofits are always looking at improving their work. Keep track of not only tasks that need to be completed related to fundraising activities, but also a running list of what can be improved. This will help keep organizational memory alive even if staff and volunteers change.

9 Celebrate successes.
When there is an individual who has a great success or your committee is part of an organizational success, celebrate. Host a lunch, have a grill out, give a small, meaningful gift, write a thank you note. Celebrate the successes as much as you would acknowledge the improvements. Feeling appreciated is a big reason why people keep up with their volunteer work. If they don't feel appreciated by your organization, they can easily share their time with another organization.

10 Create accountability.
Having a committee description, evaluations, and feedback will help to keep people committed to their roles. Also keep track of committee and event attendance as well as follow through on commitments. If you have a committee member unable to follow through with those commitments, check in with him/her one on one to talk it through. Often times, there is an external reason for people not being able to follow through. Approach your team member with compassion and find out what they might need to be successful.

11 Recruit people with a willingness to learn, not just specific skills sets or bank accounts of a certain size.

Often times, having volunteers with an interest in learning a skill or how to become a great team member is equally or more valuable than an individual who can write a single check. Cultivating a volunteer over time and recognizing that person could evolve into a life-long donor, ambassador, and leader.

12 Use the committee as a pipeline.
Remember committees are a great way to identify individuals who could be a perfect fit for your board. Committees and volunteers are outstanding places to look for recruiting individuals to your board. Taking on a role that is less of a legal and fiduciary responsibility, gives both the organization and the individual an opportunity to "try on" the organization. Is it the right cultural fit? Do the person's skills meet the needs of the organizations? It's a little bit like dating... go on a few dates before making a long-term commitment. 💰

The Team Approach to Fundraising: The Role of Staff

By Mary Ellen Olcese
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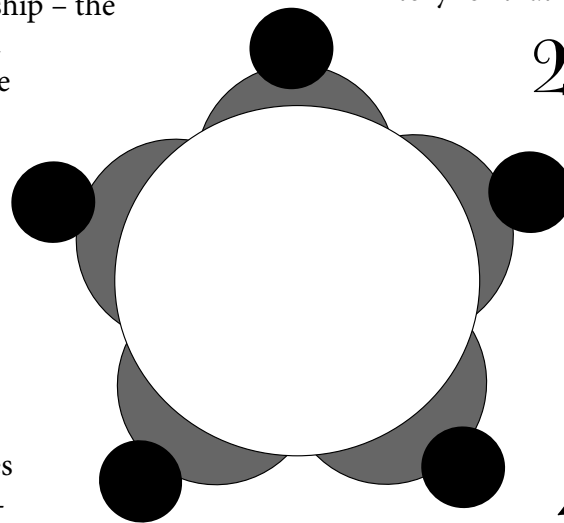
Oftentimes in working with an organization, a common complaint arises about who is doing (or not doing) what. Staff complains about the board; the board expects more from staff. A clear understanding of roles and responsibilities is imperative for a successful and sustainable organizational operation. And never is it needed more than in the area of fundraising.

Fundraising is an all-pervasive task for the organization, and requires a clear determination of who is accountable for which tasks in order to have a successful result. It also requires an understanding of the “Lead/Follow Dynamic” between board and staff. Fundraising starts with staff and board leadership – the Executive Director and the Board Chair. However, depending on the fundraising strategies employed, sometimes the staff will take the leadership role, and the board plays a supporting role (such as membership solicitation and renewal), and sometimes the board will lead the effort with staff in a supporting role (such as a board-giving campaign). This can become confusing if roles are not clearly defined and understood. It is important to address the role of board and staff while developing your fundraising plan – who will do what, when?

Successful fundraising takes a team approach. Your fundraising team should be made up of staff, board, other volunteers, and in some cases, paid experts. It is not a task to leave for one person or one committee. Concentrating fundraising duties in the hands of just one, two or a few people can be potentially dangerous to the long term health of the organization. It is an organization-wide responsibility that involves all board and all staff members. But does that mean that

everyone is out there asking for donations? Absolutely not. There are many tasks to be done in a fundraising effort – identifying prospective donors, cultivating, asking and thanking. And matching those tasks to individuals skills is the best way of forming a successful team.

For example, if an organization wants to host a house-party to target potential major donors, the following steps may occur:



- 1 Brainstorm prospects.** The board and staff identify prospective donors; the fundraising staff (Development Director, if applicable) is the repository for that list.
- 2 Determine event location.** A Board member volunteers to host a cultivation event for prospective donors.
- 3 Generate Invitations.** The fundraising staff work with the board member and Development Committee to compile the invitation list and determine logistics.
- 4 Logistics and Tracking.** The support staff helps with logistics and record keeping.
- 5 Develop Program.** The Executive Director, Development Director and Board Chair plan for the “program” part of the cultivation event;
- 6 Host Event.** Board members, appropriate staff and donors attend the event;

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7 Post-Event Communication. Specific board members, the Executive Director and fundraising staff follow up with attendees and arrange for a visit with specific potential donors;

8 Donor Visits. The Executive Director, Board Chair, other board or staff (fundraising and program) members visit with potential donors.

9 Follow-Up. The Fundraising and Support Staff handles any follow-up, including data-entry, reports and thank yous.

This process is overseen by the Development Committee, the lead fundraising staff or the Executive Director. Though this is a very simplified example, it serves to show that many people – board and staff – are involved in the process.

Whether an organization has a small staff or a large staff, fundraising is a shared responsibility between board and staff within the organization. The crux of the matter, though, is in knowing who does what. So I will attempt to break down the staff's role among the different types of staff:

- Leadership;
- Fundraising;
- Program; and
- Support.

On page 9 is a grid that outlines some overall responsibilities and specific tasks to consider for each type of staff person. This is not a comprehensive list of all tasks but covers the major efforts in a fundraising plan. If an organization does not have any or all of the staff listed, then tasks would be redistributed among other staff (if any), board members and other volunteers.

Appropriate Use of Peer Pressure

Be transparent with your board about their giving. When one member coordinates a big gift, renews their membership or donates to a campaign, make sure all the other board members know about it. It helps to honor the person that gave, but also creates a little bit of peer pressure to step up.

~Nicole Seltzer, Colorado Foundation for Water Education (CO)

| | Overall responsibility | Specific tasks |
|---|---|---|
| Lead Staff (Executive Director, President, etc.) | Chief staff fundraiser <ul style="list-style-type: none"> • Works closely with the board in their fundraising efforts • Looks for potential funding partners • Focuses on fundraising from individuals specifically major donors • Maintains the staff fundraising team • Sets program goals that shape fundraising priorities • Serves as ex-officio member of the Fundraising Committee | <ul style="list-style-type: none"> • Conducts personal face-to-face solicitations • Participates in the planning process to develop the annual fundraising plan • Maintains ongoing personal communication with a specific list of donors/potential donors • Works directly with the Board Chair to help him/her fulfill his/her strategies – such as Board Giving • Recognizes and appreciates efforts by board and staff |
| Fundraising Staff | Strategy Developer and Communicator <ul style="list-style-type: none"> • Initiates the development of the annual fundraising plan • Ensures the implementation of all fundraising strategies • Keeps the log of deadlines (applications, reports, etc.) • Seeks strategies to cultivate potential donors • Assists the Executive Director with maintaining the staff fundraising team • Researches and prioritizes potential funders • Serves as ex-officio member of the Fundraising Committee | <ul style="list-style-type: none"> • Initiates the annual planning process • Maintains records of contacts with donors • Assists with cultivation events • Reports on progress throughout the year • Works closely with board and staff to implement specific fundraising strategies • Develops and submits grant proposals |
| Program Staff | Interpreter (of programmatic work) <ul style="list-style-type: none"> • Identifies funding partners • Develops/maintains relationships with individuals, foundations and agencies that will advance the organization's mission/program | <ul style="list-style-type: none"> • Helps write grant proposals • Assists with reports to foundation/agency funders • Accompanies the Executive Director and/or board members on solicitations calls to explain more fully about the program work |
| Support Staff | Data Recorder <ul style="list-style-type: none"> • Maintains the database • Keeps the donor records; • Maintains the statistics and financial records • Plans and implements logistics with the board for fundraising events/activities | <ul style="list-style-type: none"> • Assists fundraising staff with maintaining records • Sends out thank you letters and requested materials to the donors • Implements the membership solicitation and renewal strategies, if any • Assists with cultivation events |

In short your Executive Director is the chief staff fundraiser for the organization. Even if there is a Development Director or a fundraising consultant, the Executive Director is still the chief fundraiser on staff. The Development Director is the “orchestra leader” – keeping all the strategies in tune and engaged when appropriate. If you work for an organization that does not have any or only a few of these staff persons, a discussion with the board, volunteers and any part-time staff will help determine who is doing what to fulfill these duties. When there is no fundraising staff, that task is usually left to the Executive Director and/or board leader.

And finally, it's important to build an internal “culture

of fundraising”. In this way the organization does not rely on just one individual for bringing in funds and fundraising is integrated into everyone's duties. Successful fundraising calls for a team approach, with a good plan and an understanding of the roles that each play in the plan, with support, encouragement and follow up. Along with the board, the staff becomes part of the team. Building the team takes time and energy and requires good communication among all staff members. Beyond realizing the financial goals of the organization, this approach of shared responsibility provides staff with knowledge about the organization's funding sources and finances, engages donors in the staff's programmatic work, and builds a stronger base that supports the organization's mission. 💰

Volunteer Roles

By Amy Eisenstein, ACFRE
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Do you want to raise more money? Of course you do! A great strategy to do just that involves using volunteers for fundraising. But before we discuss how to use volunteers to fundraise, it's important to understand why we use them.



3 Volunteers have time and skills.

Short on time and resources? Volunteers could be the answer, provided they are well trained and supported.

Volunteers may also bring skills to the table that you, as a staff member, don't have. Business, sales,

Why We Use Volunteers for Fundraising

1 Volunteers bring sincerity and passion.

Volunteers already love you and your organization.

It's one thing to ask for money when you're a staff member, but volunteers come at fundraising from an entirely different place. They are not being paid; rather they are there because they genuinely want to be. There is no better advocate for your cause than a dedicated volunteer.

2 Volunteers bring networks and relationships.

Of course, you've heard the concept, "six degrees of separation." Adding volunteers to your fundraising toolkit only broadens your network and your reach.

If you've been fundraising for more than a week, you know fundraising is about building relationships. Potential donors are much more likely to trust and support their friends (your volunteers) than they are to trust you. Friends give to friends.

and marketing skills are all extremely valuable and transferable to fundraising.

How to Use Volunteers as Fundraisers

1 Identify important skills and characteristics.

What skills and characteristics do you want in a volunteer fundraiser?

2 Solicit current volunteers (board and non-board members).

Using the list of criteria above, identify current and potential volunteers. Include board members as well as non-board volunteers. Are there volunteers who work in the office, directly with the clients, or in other parts of your organization who might be willing to help with fundraising?

3 Create a list of ways to help.

Provide a list of current fundraising opportunities—large and small. Your volunteers may not be aware of many of the opportunities to get

involved, especially if they are not board members, or working near the administrative offices. Communicate with all volunteers, but specifically target those you have identified as willing to help in this area.

Examples of ways volunteers can help with fundraising include:

- Bringing friends on tours of your organization.
- Selling tickets and sponsorships.
- Signing appeal letters to their network of friends and family.
- Making thank you calls to donors.
- Promoting your organization through social media sites.

4 Train your volunteers.
If you expect volunteers to do things in certain ways and be successful, they must be trained. Period.

5 Provide specific instructions and doable tasks.
Don't assume your volunteers know what to do. Fundraising isn't "natural" to most people. The more specific you can be, the more successful they will be.

And remember, volunteers are busy people too. If you ask them to make three calls this month (as opposed to thirty or three hundred), they are likely to be successful and come back for more.

Provide Necessary Encouragement & Support

Ask staff or board to seek sponsorships for an Adopt-a-River Sites or Wild & Scenic Film Festival—encourage them to go to the people who fix their cars, banks, restaurants, vendors, or other businesses. You can also challenge each director and staff to recruit at least three new members each year--the challenge has been raised to five, in some cases. Letters and other materials are provided to support the "ask."

~Michele L. Tremblay, Naturesource Communications (NH)

cont. on page 12

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Specific Instructions for Fundraising Volunteers

Make your tasks and activities are “no-brainers”. Provide volunteers with the exact tools and training they need, even if it seems obvious to you. The more specifics you provide, the better.

Writing Notes. If you’re asking volunteers to write notes on appeal letters or forward an email to their friends, have you provided sample text?

Serving on Committees. If you want volunteers to serve on a committee, have you given them a job description? Do they know how many meetings they are expected to attend? Do they understand that soliciting at least one sponsor is part of the job?

Thank You Calls. If you’re asking them to make thank you phone calls, have you provided a script in the form of bullet points? Have you told them what to do if they get an answering machine? Should they leave a call back number? Should it be theirs or that of the organization?

Spreading the Word Online. Younger and tech savvy volunteers may be willing to help spread the word online. Can you provide them with a message and working link (directly to your donation page) to send to their friends and family via email?

Conducting Tours. If volunteers are willing to make introductions to the organization by bringing friends on a tour, are they expected to join the tour as a guest? As a guide? What role do you want them to play on the tour? Is there any follow up you’d like them to do after the tour is over?



Fundraising Events. Provide ways for people to bring friends to your fundraising events. Will volunteers bring friends as their guest and invite them to sit at their table? Will they hand-write notes on the formal invitation to encourage their friends to buy tickets? Are there electronic invitations available?

If you want your volunteers to be actively engaged with fundraising, and to help you raise a lot more money, you’re going to need to help them by keeping it simple.

Have you ever tried any of these ideas with your volunteers before? Were you specific with your instructions? Tell me about it in the comments.

Specific Tasks for Fundraising Volunteers

Many board members and other volunteers “fail” at fundraising, because they don’t know what to do or what’s expected of them. Simply put, they are afraid of fundraising. It’s your job to break it down, make it easy, and take the fear away.

Here are some examples of how to be specific. Ask each volunteer or board member to pick one activity per month. The simpler you can make it, the better results you’ll get.

- Hand-write notes on 10 appeal letters to friends and family members in October/November (20 minutes).
- Serve on gala committee. This includes soliciting sponsors. (1-2 hours per month including meetings).
- Make 5-10 thank you calls per month (20 minutes per month).
- Forward an online appeal, and personalize it to ten or more friends. (10 minutes)
- Bring 2 friends on tours (1 hour per tour).
- Invite 3 friends to the next fundraising event (10 minutes) 💰

Once Upon a Time...

I have found that including everyone at every level has been very successful for us.

1. Most successful by far is having a great story to tell, and a solid, charismatic person to tell the story. The story must be one that can be told to audiences of any size and any age.
2. Never underestimate the power of the youth in your community, their involvement and energy tells the story for you !!

~ Peter Payton, Groundwork Dallas (TX)

Chart of Roles

by River Network

Who Is Doing What

*F*undraising is most successful when done as a team, but that doesn't mean that everyone should be responsible for everything. As with any successful team, fundraising requires leadership. Whether you employ a development team or are an all-volunteer organization, it is important to assign an individual (or, when appropriate, individuals) accountability for specific tasks.

The chart on page 15 is meant to do three things:

1. Highlight some of the most common tasks related to fundraising.
2. Indicate who – traditionally – is best suited to be held accountable. In some instances, more than one leader is indicated; this is intended to acknowledge that the perfect world doesn't always exist and we often must adapt to specific circumstances (e.g., no paid staff exist).
3. Emphasize that fundraising is collaborative.

Canoe-a-thon

During Paddle Georgia we have a canoe-a-thon where participants raise funds from their family and friends to benefit Georgia River Network and to help us make a grant to the local river group. Last year the participants raised over \$50,000! You can get all the details here: www.garivers.org/paddle_georgia/pgcanoeathon.html.

~April Ingle, Georgia River Network (GA)

Chart of Roles

| FUNDRAISING TASK | LEAD(S) | SUPPORT |
|--|-------------|------------------|
| Plan | | |
| Establish fundraising objectives | Staff | Board |
| Create annual budget | Staff | |
| Approve annual budget | Board | |
| Develop organization's annual fundraising plan | Staff | Board |
| Research/Cultivate/Implement | | |
| Identify/target potential funders | Staff/Board | Volunteers |
| Maintain ongoing contact with funders | Staff/Board | |
| "Open the door" with potential funders | Staff/Board | Volunteers |
| Research potential funders primarily through guides or other written materials | Staff | Volunteers |
| Prepare solicitation letters, proposals, project budgets, reports and other fundraising material | Staff | |
| Sign solicitation letters or letters accompanying proposals | Staff/Board | |
| Make solicitation visits | Staff/Board | |
| Do outreach/marketing for special events | Staff/Board | Volunteers |
| Host 'house-party' | Staff | Board/Volunteers |
| Make an annual contribution to the organization | Staff | Board/Volunteers |
| Manage/Track/Acknowledge | | |
| Manage annual budget | Staff/Board | |
| Track deadlines for proposals, reports, etc. | Staff | |
| Call funders to thank them for gifts | Staff | Board/Volunteers |
| Sign thank-you cards/letters | Staff | Board/Volunteers |
| Record donations in organizational database | Staff | Volunteers |
| Update contract information in organizational database | Staff | Volunteers |

Note: a blank chart – so that you can assess how your organization is managing your fundraising tasks – can be found at: www.rivernetwork.org/resource-library/RFChart. 

River Fundraising Alert

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