



**Association of Fundraising  
Professionals  
Audioconference 2005**

*Educating Fundraisers in the 21<sup>st</sup> Century*

**Virtual Seminar**

**1:00 PM –2:30 PM Eastern  
12:00 PM – 1:30 PM Central  
11:00 AM- 12:30 PM Mountain  
10:00 AM- 11:30 AM Pacific  
9:00 AM – 10:30 AM Alaska**

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***Achieving Dramatic Increases  
In Your Annual Fund***

Presented by:

**Stanley Weinstein, ACFRE, EMBA**

**Wednesday, January 12, 2005**

**Stanley Weinstein, ACFRE  
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**STANLEY WEINSTEIN, EMBA, ACFRE  
PRESIDENT, STANLEY WEINSTEIN & CO.**

When clients report on Stanley Weinstein's work, they use adjectives such as, thorough, efficient, effective, and successful. Often, they describe his work as "transformational." Stanley Weinstein is President of Stanley Weinstein & Co. With more than 37 years of professional experience in the private sector and nonprofit world, Stanley has distinguished himself as a consultant, teacher, and author.

From 1988 to 2001, Stanley served as Founder of Stanley Weinstein & Co. a consulting firm that evolved into BFT&W with offices in New Mexico, Pennsylvania, and Massachusetts. During his tenure, the firm served a broad spectrum of education, healthcare, arts, religious and social service nonprofit organizations nationwide. In 2001, Mr. Weinstein's firm was acquired and Stanley served as Executive Vice President of the combined firm.

In 2002, Mr. Weinstein decided to pursue his vision of again leading a national consulting firm founded on the principles that exemplify the best practices of organization development.

As a consultant specializing in organization development, strategic planning, fundraising, annual and capital campaigns, Stanley Weinstein has had the opportunity to work closely with chief executives of nonprofit organizations. He also worked directly with community leaders, chief executives of corporations and founders of highly successful entrepreneurial firms. This background gave Stanley a unique perspective on issues related to Management and Marketing.

Stanley Weinstein is recognized for his organizing and motivational skills. His capital campaigns and major gift initiatives have resulted in numerous significant gifts ranging from \$50 thousand to \$50 million. Mr. Weinstein was the first person to receive the New Mexico Chapter of AFP's award for Outstanding Fund-Raiser. Mr. Weinstein travels nationwide devoting time to consulting, writing and speaking assignments. He is the author of *The Complete Guide to Fundraising Management*, 2nd Edition published by John Wiley & Sons. His latest book, *Capital Campaigns from the Ground Up*, was released by John Wiley & Sons in October, 2003. Mr. Weinstein holds an Executive MBA degree from the University of New Mexico.

His presentations include: "Building Strong Boards – a Fresh Look;" "Strategic Decision-Making Processes;" "Capital & Endowment Campaigns – The Consultant's Role;" "How to Have a Breakthrough Retreat;" "Charitable Gift Planning – a New Paradigm;" "Five Focus Dimensions to Increase ROI;" "What For-Profit Organizations Can Learn from the Non-Profit Sector – Motivation, Mission, and Focus;" and, many other topics dealing with organization development, fundraising, capital & endowment campaigns, management, marketing and motivation. His article, *Time Management and the Development Professional*, was published in the *NSFRE Journal*. Reviews of Stanley's presentations are always enthusiastic.

## **Audioconference Presentation**

### **“Achieving Dramatic Increases in Your Annual Fund” January 12, 2005**

Stanley Weinstein, ACFRE  
President, Stanley Weinstein & Co.

#### **SESSION DESCRIPTION:**

This session focuses on high-payoff, cost-effective, and proven strategies for achieving extraordinary fundraising results. Participants will learn the critical success factors for designing and managing a significant annual campaign. As important, development professionals will learn how to integrate a major gift initiative – one based on capital campaign principles – into the plan. In this fast-paced session, participants will learn how to recruit movers & shakers who will help identify, cultivate and successfully approach major gift prospects. Suggestions presented will help assure that top priority activities get performed. A creative approach to donor cultivation offers prospective volunteers, supporters and current donors involvement activities that they genuinely enjoy.

#### **GOALS OF SESSION:**

- Learn how to design and implement a comprehensive annual campaign that includes a highly effective major gift initiative;
- Learn how to stay focused on the priority actions needed to increase net contributed income;
- Learn how to recruit volunteers who will actually make their calls;
- Learn how to design a cultivation program that “Wows” donors, prospects, & volunteers;
- Learn how to overcome your organization’s “poverty mentality” and raise pace-setting major gifts – on an annual basis.

## THE SUCCESSFUL ANNUAL CAMPAIGN

### A. Elements and Fundraising Strategies

1. *Traditional approach*: direct mail; phone; special events; limited grantsmanship and major gifts.
2. *New vision for the annual campaign*:
  - a. increased & more effective direct mail;
  - b. email contact and solicitations;
  - c. consider phone acquisition and solicitation;
  - d. limit special events to one or two “signature” events with larger sponsorships and higher net income potential;
  - e. seek “special project” grants for the most attractive elements of the organization’s ongoing programs;
  - f. integrate highly effective major gift individual and group solicitations into the nonprofit organization’s resource development program.

### B. The Importance of the Information System

1. Dedicated fundraising software is essential for the management of a comprehensive resource development program.
2. Managerial buy-in is crucial. Top development directors must provide direction and oversight.
3. Begin with accurate gift entry. Always record at least these five key data points:
  - a. accurate contact information (name, address, phone, etc., also be sure to capture email address when possible);
  - b. amount of gift;
  - c. date of gift;
  - d. how the gift was acquired;
  - e. whether the gift is unrestricted or how the funds are to be used.
4. Review the accuracy of your reports:
  - a. score-keeping reports
    - √ total funds contributed and pledged
    - √ numbers of donors (total, # renewed, # increased, # new)
    - √ other score-keeping reports (total grants, totals by type of donor, etc.)
  - b. attention-directing
    - √ prime prospects *not* assigned to a solicitor
    - √ cashflow projections
    - √ performance vs. budget

- c. problem-solving or decision-making reports
  - √ solicitation analysis (shows results of each solicitation strategy *vis a vis* numbers contacted & related expenses)
  - √ mail test list(s) analysis

## **MOST IMPORTANT STEPS TO INCREASE NET CONTRIBUTED INCOME FROM EACH FUNDRAISING STRATEGY**

### **A. Direct Mail Fundraising**

1. Most nonprofits send too few solicitation mailings to their in-house list of donors. **Mail more frequently!**
2. Most nonprofits drop too few acquisition mailings. Increase the acquisition program.
3. Most nonprofits are not sophisticated in their testing. Learn the principles of testing and improve response rates and increase gift amounts.
4. Most nonprofits are not sophisticated in their segmentations. Learn the importance of recency, frequency, and gift amounts. Tailor the number of mailings and the messages to segmented donor populations.
5. Understand the mathematics related to direct mail. Exercises.
  - a. Acquisition: 10,000 mailed; total cost \$.50 per piece; 1% response rate; \$36 average gift. Does this make economic sense?
  - b. Objective: increase number of annual mail donors by 10%. 2,000 current mail donors. How many new donors are needed? Approximately how many pieces must be dropped to achieve this objective?

### **B. Electronic Contact And Solicitation**

1. Capture email addresses.
2. Create an attractive website for your nonprofit.
3. Include the “Donate Now” option.
4. Proactively create and send irregular or periodic – but not too frequent – email newsletters or attractive notes.
5. Provide an “unsubscribe” option.
6. Test or email solicitation messages.
7. Attend seminars concerning this rapidly evolving and changing field.

### C. Telephone Fundraising

1. Many nonprofits and development professionals make decisions concerning telephone fundraising based on personal prejudice and emotional responses. Consider telephone fundraising. **Don't be guided by personal aversion.**
2. Volunteers can be used effectively for renewals and upgrades of the in-house donor list.
3. Telephone solicitation companies can be used prudently for acquisition and renewal programs.
4. Results can be monitored and managed in a way to assure cost-effectiveness.
5. Needed for volunteer phone-a-thon: location, scripts, tips, lists (40 names per volunteer hour), volunteer recruitment, orientation, and systems.
6. Volunteer phone time-line: 3 months prior to phone-a-thon secure location; 2 ½ months prior determine segmentation criteria—focus on regular donors and new prospects with a relationship to the nonprofit; 2 months prior recruit volunteers; 1 ½ months prior prepare tips, scripts, instructions, and follow-up letters; 2 weeks prior send volunteer reminders; 1 week prior print phone-a-thon forms that include prospect giving history and relationship to nonprofit. Each phone-a-thon night: provide orientation; smile and dial; separate forms into “yes,” “no,” “maybe,” “special handling,” and “no answer” stacks. Each morning following the calls: mailmerge thank you reminder letters with return envelopes.
7. Basic telephone script
  - a. **Opening:** introduction; confirm contact information
  - b. **The short case:** “I don't know if you are aware of how much XYZ has been able to do with your contributions. (Pause) A lot of people know about our \_\_\_\_\_ program but not everyone knows about our \_\_\_\_\_.”
  - c. **The close:** “To continue our programs we need your participation each year. So I hope you are in a position to consider a contribution of \$XXX or more.”
  - d. **Silence.** Wait for response.
  - e. **Respond** to “yes,” “no,” “maybe” or handle objection.
  - f. **Close again** if needed.
  - g. **Reconfirm** understanding.

### D. Special Event Fundraisers

1. Many nonprofits devote far too much time to “nickel and dime” special event fundraisers. Do fewer events. But assure that the one or two signature events you stage each year have high PR value *and* produce significant net contributed income.

2. The event should be fun and consistent with the organization's image and mission.
3. The event should appeal to the organization's natural constituencies and beyond.
4. Use the principles of major gift fundraising (strong case, donor cultivation, well chosen volunteer/staff solicitation team, peer relationships, "larger asks," and proper stewardship and acknowledgment).
5. **Seek larger sponsorships.**
6. Layer event with income-producing possibilities (sponsorships, ticket sales, auction, raffle, ad sales, merchandise sales, etc.).
7. Recruit and reward a growing pool of volunteers to sell the tickets, secure the sponsorships, get the auction items, handle logistics, etc.

## **E. Grantsmanship**

1. Regularly schedule research. Identify opportunities and projects. Identify potential funders. Record the following:
  - a. Application procedures
  - b. Foundation's gift range
  - c. Areas of interest and funding priorities
  - d. Sample language used by the foundation to describe itself
  - e. Deadlines (record deadlines or self-imposed deadlines based on foundation board meeting dates)
2. Form relationships with funders – seek their advice
3. Create a year schedule of grant applications. On a single form, record the chronological list of foundation applications, the request amount, the due date, and summary comments.
4. Reproduce commonly used attachments. Have ample supplies of audits, financial statements, board lists, 501(c)(3) determination letters, etc.
5. Demystify the grants process. Learn to write clear language. Answer the questions. Follow instructions.
6. Package attractive elements of the organization's services and programs. Treat as special project support. If you identify foundations that do provide operating support, by all means maintain positive relationships with these funders. Inspire confidence. Be gracious in your acknowledgments.

## **F. Major Gifts**

1. Elevate the importance of major gift fundraising. (See next section.)
2. Learn to recognize your organization's "poverty mentality." Learn how to overcome this and raise expectations while focusing on your organization's visionary approach to service.
3. **Use capital campaign principles on an annual basis.**
  - a. A well-written case for support is a must.
  - b. Face-to-face personal solicitations are central to your success.
  - c. Volunteers with peer relationships are central to your success.
  - d. Plan and monitor creative cultivation strategies.
  - e. Seek significant pace-setting, leadership level gifts.

## **THE MAJOR GIFT INITIATIVE**

### **A. Building The Case For Support**

1. Elements of the case: brief history; problem statement; your organization's solution – programs and services; who is served; how are their lives made better; poignant stories; any special challenges your organization must overcome to better serve; a call to action; how the gift will be used and acknowledged. In short, the case statement should describe the rationale for providing annual support, sponsorships, and significant major gifts to your organization.
2. The case statement as a "conversion process."
3. The case statement is a central feature of every capital campaign. A well-written case statement—with buy-in from key stakeholders—forms the basis for all materials you will use during annual major gift solicitations.

### **B. Developing More Visionary Gift Opportunities And Acknowledgment Programs**

1. Identify *all* gift opportunities: gift club categories; sponsorships; special project support; program support; other opportunities unique to your organization.
2. Create higher level gift opportunities. (If your organization's current largest gift level is \$25,000 a year, consider creating a \$100,000 gift level. In general terms, create gift levels at least two to four times higher than your current top giving levels.)
3. Develop acknowledgment policies. Be generous in your acknowledgments. Be creative. Assure that acknowledgments are appropriate and commensurate to the gift level.

### **C. Identifying Prospective Major Gift Donors**

1. Board and past board members
2. Current and past generous donors
3. Philanthropic individuals, corporations and foundations that support causes similar to yours
4. Affluent individuals with whom your board members and volunteers have a peer relationship. (The Development Director must meet one-on-one to elicit the most effective information.
5. The organization's affluent constituents – symphony subscribers, university alum, hospital former patients, etc.
6. Others unique to your organization. (Examples: top staff of medical or large educational institutions; successful artists and performers, spouses of deceased leaders in the field of interest, etc.

### **D. Prospect Research**

1. Devote sufficient time and attention to prospect research.
2. Integrate research into the cultivation and solicitation process.
3. Focus on donor capacity as well as giving history.
4. Know your major donors as real people. Understand them as individuals.
5. Focus on four key research factors:
  - a. Relationship to and history with your nonprofit (giving history, volunteer service, awards, cultivation participation, any “negative baggage”
  - b. Hobbies and interests, especially as they relate to your nonprofit
  - c. Network (business relationships, friends, relatives) and relationships to key people with your organization
  - d. Capacity to give (net worth, form of wealth, philanthropic tendencies)

### **E. Recruiting Volunteers Who Actually Make Their Calls**

1. The importance of peer relationships
2. Go for the Gold!
3. Treat volunteer recruitment with the same care as a major gift solicitation.

4. Learn the language of recruitment and effective recruitment strategies.
  - a. Send peers, passionate & articulate people and brave souls.
  - b. Effective language: “adopt us;” “so and so spoke highly of you and thought you would enjoy the opportunity to serve;” “help us put together the ideal team to tackle this problem;” “do you have a leader in your organization who feels passionately about this issue;” and, a host of other direct and sincere appeals for service.
5. Consider recruiting the spouse of the mover and shaker.
6. Recruit some articulate retired people.
7. Anticipate the most common objections and learn how to respond.
8. Keep notes and follow-up. Sometimes it’s possible to recruit for a later start date.
9. Learn how to increase comfort with the thought of fundraising during the recruitment.
  - a. Assure volunteer prospects that staff support will be ample.
  - b. Assure that each volunteer’s time will be used wisely.
  - c. Speak of the fun committee members have.
  - d. Speak in terms of each volunteer “making 3 to 5 introductions for fundraising purposes.”
  - e. Speak about finding each committee member’s comfort level.

**F. Nurturing Positive Relationships – Creative Donor Cultivation Strategies**

1. The anatomy of a social/informative gathering
  - a. Staged at an attractive upscale home or in an interesting location
  - b. Food, fellowship and fun
  - c. Well-structured presentation (relatively short)
  - d. State the case. Useful facts & figures. A poignant story or two.
  - e. State that “we hope that many of you here tonight will make XYZ Nonprofit one of your philanthropic priorities in the months and years ahead.”
  - f. Let attendees know that you will be visiting with them in the near future to gather their advice and to speak to them about their commitment.
2. The importance of creative parties
  - a. Consider ideas such as: a British lawn party; a catered gathering at a major donor’s home; theme or event gatherings; etc.
  - b. Provide affluent people with experiences that cannot be otherwise purchased.
  - c. Provide networking opportunities.
  - d. Seek sponsors for your cultivation gatherings.
  - e. Keep the presentations at these cultivation gatherings to the point, brief, and poignant.
3. The importance of attractive printed invitations

4. The importance of “warm and personal” invitation follow-up calls
5. Well structured tours of facilities and behind-the-scenes visits
6. Lunches with top administrative and program staff
7. A host of other cultivation strategies
8. The importance of scheduling and monitoring relationship-nurturing steps

### **G. Effective Volunteer Training And Motivation**

1. Campaign orientation philosophy
2. Elements of an effective orientation session: institution and project overview; securing appointments; the art of asking; follow-up, campaign record keeping and procedures
3. Adults learn by participation and practice. Consider participation techniques such as:
  - a. List volunteers’ objections to making personal solicitations (leave space after each); list volunteers’ solutions and observations concerning each objection
  - b. Practice solicitations.
    - √ Role-playing with “cooperative prospect.”
    - √ Role-playing with “difficult prospect.”
    - √ Stop-action discussions related to role-playing.
    - √ Role-playing with and without eye contact and donor response.
    - √ Other role-playing models.
4. Stress the value of team visits
5. Know the value of regular uplifting report meetings
6. Provide special training for group solicitations (if the number of people who can be personally visited is too large to handle on a one-to-one basis)
7. Strategies for keeping volunteers and staff on track and motivated

### **H. Stewardship and Acknowledgment**

1. Four parts to an acknowledgment program: donor recognition; donor benefits; permanent recognition; involvement opportunities.
2. Make your gift club gatherings memorable and fun.
3. Meet and exceed donor expectations. Provide “WOW” donor service.

## **I. Staff Support**

1. Provide meaningful training and orientation
  - a. Every volunteer should attend at least one group orientation session.
  - b. The development officer should speak to each volunteer solicitor individually prior to his or her solicitation visits.
  - c. The development officer should continually strive to improve the training opportunities offered.
2. Prepare presentation materials. Customize presentation packages.
3. Provide prospect research services.
4. **The development officer must be a proactive partner in seeking and obtaining appointments with prospective donors.**
5. Provide regular staff support for timely reporting meetings.

## **J. Managing Expectations**

1. Your major gift initiative may get off to a modest start.
2. Volunteer recruitment and orientation takes time.
3. Measure success by the increasing number of face-to-face prospect contacts and solicitation meetings each year. The contributions will follow.

## **TIME MANAGEMENT PRINCIPLES FOR THE DEVELOPMENT PROFESSIONAL**

### **A. Be Aware of Time and How You Spend It.**

1. Occasionally log time;
2. Note blocks of time spent on ombudsman or generalist activities . . . or worse yet, matters totally unrelated to resource development;
3. Note how much or little “face time” you have with potential major donors.

### **B. Eliminate the Time-Wasters:**

1. poorly run meetings;
2. time devoted to low-payoff fundraising strategies;

3. dead end reports and office procedures;
4. procrastination;
5. the biggest time-waster of all – self-interruptions.

**C. Devote Sufficient Time To Resource Development Infrastructure:**

1. Information system: software selection; data entry; standard & specialized reports; gift handling policies & procedures;
2. Case for support and fundraising materials;
3. Acknowledgment policies and systems;
4. Cultivation policy & schedules;
5. Staff training;
6. Other policies, procedures & controls.

**D. Learn How To Stagger Fundraising Activities And Develop An Annual Calendar That Can Be Handled Even By A Small Or Medium-Sized Staff If Need Be. (See sample calendar/gantt chart.)**

1. Even a small shop can handle *at least* the following:
  - a. two acquisition mailings;
  - b. three mailings to the in-house list annually (these three mailings are segmented);
  - c. a personal solicitation program;
  - d. one volunteer phone-a-thon;
  - e. two planned giving seminars (one for prospects, one for planned giving professionals);
  - f. one or two major special events annually;
  - g. at least two newsletters annually;
  - h. a simple-to-administer grants program;
  - i. a vigorous cultivation and acknowledgment program.
2. Time activities based on response rates.
3. Schedule cultivation events.
4. Outsource.
5. Include a major gifts program.
6. Solicit larger numbers of prospects at group gatherings—some at volunteers' homes.
7. Employ comprehensive approach.



**PROSPECT RATING FORM  
COVER PAGE**

XYZ Nonprofit Organization is preparing for a Campaign to enable us to strengthen all of our programs for the people we serve . . . while at the same time maintaining our reputation for financial stability and sound management. The information gathered on this form will help us refine our plans. The campaign can only succeed with the generous support of a number of pace-setting contributors.

The information derived from this and other “ratings and evaluations” activities will be kept confidential and treated with the utmost discretion. The final decision concerning the correct amount of contribution to request will be based upon the prospective donor's capacity, philanthropic nature and relationship to XYZ Organization. The correct choice of solicitor can only be determined with knowledge of the prospect's network of associates.

When rating capacity to give, keep in mind the prospect's total means rather than past giving patterns. In other words, please indicate the maximum potential.

Thank you for your help. Your opinions are valuable to us.

## PROSPECT RATING FORM KEY

**PLEASE USE THE FOLLOWING KEYS WHEN FILLING IN THE FORM:**

### **MAXIMUM CAPACITY**

**(Base on Prospective Donor's Total Assets)**

Enter number 1 through 8 based on your best guess. Leave blank only if you have no knowledge whatsoever.

- |   |                   |                                     |
|---|-------------------|-------------------------------------|
| 1 | \$1,000,000       | or more 3 to 5 year pledge capacity |
| 2 | 500,000           | or more 3 to 5 year pledge capacity |
| 3 | 100,000           | or more 3 to 5 year pledge capacity |
| 4 | 50,000            | or more 3 to 5 year pledge capacity |
| 5 | 30,000            | or more 3 to 5 year pledge capacity |
| 6 | 15,000            | or more 3 to 5 year pledge capacity |
| 7 | 7,500             | or more 3 to 5 year pledge capacity |
| 8 | Less than \$7,500 | 3 to 5 year pledge capacity         |

### **LEVEL OF INTEREST IN XYZ NONPROFIT ORGANIZATION – AND PHILANTHROPIC TENDENCY**

Enter letter A through E based on your best guess. Leave blank if you have no knowledge of prospect.

- |   |   |
|---|---|
| A | High level of interest in XYZ Nonprofit Organization  |
| B | Moderate level of interest (probably donates or attends organization activities)  |
| C | Low level of interest but with potential for cultivation (doesn't give or participate yet but is interested in the goals of the organization) |
| D | Little known interest in the goals of the Organization but has demonstrable civic pride   |
| E | No interest and no concern for community  |

### **YOUR RELATIONSHIP TO PROSPECT**

Enter number 1 through 5 to indicate the phrase that best describes your relationship.

- |   |   |
|---|---|
| 1 | Best of friends, relative or close business associate |
| 2 | Acquainted and friendly                               |
| 3 | Met once or twice                                     |
| 4 | Never met   |
| 5 | Hostile relationship                                  |

**PROSPECT RATING FORM**

**VOLUNTEER'S NAME:** \_\_\_\_\_

<b>Donors &amp; Prospects Name / Company</b>	<b>Max Capacity</b>	<b>Interest in Our Org.</b>	<b>Your Relationship</b>	<b>Willing to Visit?</b>
Mr. Ronald P. Abelson				
Mr. Thomas N. Ackerly				
Dr. & Mrs. Arthur Q. Adelle				
Mr. & Mrs. Harry B. Allen, III				
Mr. Lawrence C. Amlen				
Mr. Stanley W. Ammson, Jr.				
Aphorism Industries Paul Epigram, President				
Mr. & Mrs. Robert O. Baxter				
Mrs. Evelyn T. Carter				
Harold Charles, Esq.				
Mr. & Mrs. Russell Clinett				
Mr. & Mrs. Steven Darnit, Jr.				
Mr. & Mrs. William Derby				
Mr. & Mrs. Frank Desstitute				
Staff fills in 300-400 names prior to the Volunteer review				

**COMPILED PROSPECT RATING FORM**

<b>NAME/COMPANY</b>	<b>MAXIMUM CAPACITY</b>	<b>INTEREST IN ORG.</b>	<b>YOUR RELATIONSHIP</b>	<b>WILLING TO VISIT?</b>
Mr. Ronald P. Abelson				
Mr. Thomas N. Ackerly	6(Carr) 5(Harrison)	B(Carr) C(Harrison)	2(Carr) 2(Harrison) 3(Hagard) 2(Mitchem) 2(Whitt)	
Dr. & Mrs. Arthur Q. Adelle	7(Carr)  3(Herring)	  D(Herring)	2(Carr) 2(Hagard) 2(Herring)	
Mr. & Mrs. Harry B. Allen, III	7(Carr)		3(Carr) 3(Hagard)	
Mr. Lawrence C. Amlen	7(Harrison)	C(Harrison)	2(Harrison) 3(Hagard)	
Mr. Stanley W. Ammsom, Jr.	7(Liddy) 8(Mitchell) 8(Carr) 8(Harrison)	C(Liddy) C(Mitchell)  C(Harrison)	1(Liddy) 2(Mitchell) 2(Carr) 2(Harrison) 3(Hagard) 2(Michel, II)	Y(Liddy) Y(Mitchell) Y(Carr)
Aphorism Industries Paul Epigram, President	1(Liddy) 2(Carr) 2(Hagard)	B(Hagard) A(Liddy) A(Carr)	2(Hagard) 2(Liddy) 4(Carr)	
Mr. & Mrs. Robert O. Baxter				
Mrs. Evelyn T. Carter				
Harold Charles, Esq.				
Mr. & Mrs. Russell Clinett	8(Harrison)	C(Harrison)	2(Harrison) 3(Hagard)	
Mr. & Mrs. Steven Darnit, Jr.				
Mr. & Mrs. William Derby				
Mr. & Mrs. Frank Desstitute	8(Liddy)	D(Liddy)	5(Liddy)	



## **CERTIFICATE OF PARTICIPATION**

**I was a participant in the AFP Audioconference held  
January 12, 2005  
1:00 – 2:30 PM Eastern**

***Achieving Dramatic Increases In Your Annual Fund***

**Presented by**

**Stanley Weinstein, ACFRE, EMBA**

**Participation in this session or use of the tape materials package  
qualifies for 1.5 points toward CFRE education requirements.**

**Signed** \_\_\_\_\_

***This is for your records only.***



## Books by Stanley Weinstein

### Capital Campaigns from the Ground Up: How Nonprofits Can Have the Buildings of Their Dreams (AFP/Wiley Fund Development Series)

The nonprofit leader's complete source on setting, pursuing, and meeting building campaign goals, nonprofit veteran Stanley Weinstein's *Capital Campaigns from the Ground Up* gives decision-makers the guidance they need to accomplish one of the most important steps in the growth of an organization: the campaign for funding and completing a significant building project. Whether for arts-, religious-, education-, healthcare-, preservation-, or social service—related projects, this book lays out a detailed road map for successfully managing all aspects of project realization. Moving easily from preparation to design to fundraising, *Capital Campaigns from the Ground Up* presents a comprehensive approach to coordinating these efforts. This practical, clearly written handbook will help you.

ISBN: 0-471-22079-5

Hardcover

312 pages

October 17, 2003

**AFP Price: USD 46.00**

### The Complete Guide to Fundraising Management (2nd Edition) AFP/WILEY FUND DEVELOPMENT SERIES

**The Complete Guide to Fundraising Management**, Second Edition, provides a user-friendly road map for fundraising success in a highly competitive philanthropic environment. A practical how-to book tailored specifically to the needs of professional and volunteer fundraisers, it moves beyond theory to address the day-to-day problems faced in these organizations, and offers sound advice and proven solutions. The book and accompanying CD-ROM include all the tools, tips, and techniques you need to make your nonprofit stronger and find the resources you need.

Format: Cloth, 384p.

ISBN: 0471200190

Pub. Date: February 2002

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**ASSOCIATION OF FUNDRAISING PROFESSIONALS  
AUDIOCONFERENCE 2005  
*Educating Fundraisers in the 21<sup>st</sup> Century***

**DON'T MISS THIS WHOLE YEAR OF GREAT PROGRAMS FROM EXPERTS IN THE FIELD**

- **JANUARY 12, 2005, WEDNESDAY (FRE8798-0)**  
*Achieving Dramatic Increases In Your Annual Fund*  
**Stanley Weinstein, ACFRE, EMBA**, President of Stanley Weinstein & Co, author
- **FEBRUARY 8, 2005, TUESDAY (FRE8799-0)**  
*Essential Presentation Skills for Fundraisers*  
**Robbe Healey, MBA, CFRE**, NHA Development Director for The Hickman and Principal of Farr Healey Consulting, LLC
- **MARCH 10, 2005, THURSDAY (FRE8800-0)**  
*Sky High! Major Gift Strategies to Engage & Excite Your Donors & Prospects*  
**Nick G. Costa**, Senior Vice President, Fund Development for Stamford Health Foundation, author
- **MAY 3, 2005, TUESDAY (FRE8801-0)**  
*Raising More Money: Building the Bridge from Annual Fund to Endowment*  
**Terry Axelrod**, CEO & Founder, Raising More Money, author
- **JUNE 7, 2005, TUESDAY (FRE8802-0)**  
*Beyond the Essentials of Acknowledgement and Recognition: When Saying "Thank You" is Not Enough*  
**Janet Hedrick, CFRE**, Senior Associate Bentz Whaley Flessner
- **JULY 14, 2005, THURSDAY (FRE8803-0)**  
*Empowering your Board to Succeed in Fundraising v. Challenging them to Fail*  
**Barbara Talisman**, President, Talisman Associates, Inc.
- **AUGUST 10, 2005, WEDNESDAY (FRE8804-0)**  
*How to Engage Your CEO in Fundraising*  
**Glenn H. Tecker**, President and CEO, Tecker Consultants & **Wells B. Jones**, CAE, CFRE, Chief Executive Officer, Guide Dog Foundation for the Blind, Inc.®
- **SEPTEMBER 8, 2005, THURSDAY (FRE8805-0)**  
*Endowment Fundraising: What Exactly Are We Afraid Of?*  
**Jill Pranger, CFRE**, President, Pranger Consulting and Training
- **OCTOBER 5, 2005, WEDNESDAY (FRE8806-0)**  
*Conflicting Values: Solving Ethical Dilemmas*  
**Eugene R. Tempel, Ed.D., CFRE**, Executive Director Center on Philanthropy at Indiana University, author
- **DECEMBER 8, 2005, THURSDAY (FRE8807-0)**  
*The Widow's Might...Understanding a Vital Source of Current and Future Funding*  
**Robert F. Sharpe, Jr.**, President Robert F. Sharpe & Co., Inc.

***The Audioconferences will be held at 1:00-2:30pm Eastern / 12:00-1:30pm Central  
11:00am-12:30pm Mountain / 10:00-11:30am Pacific / 9:00-10:30am Alaska***

***FEES: \$130 (US) per member site per session; \$180 (US) per nonmember site per session***

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***TO REGISTER OR TO ORDER THE TAPE/MATERIALS PACKAGE PLEASE CONTACT  
KRM INFORMATION SERVICES, INC., AT 1-800-775-7654.***

***NOTE: Live participation or use of an audiotape of the program qualifies for 1.5 points toward CFRE education requirements.***

**QUESTIONS ABOUT THE CONTENT OF THE AUDIOCONFERENCES?  
PLEASE SEE OUR WEBSITE [www.afpnet.org](http://www.afpnet.org) OR CONTACT AFP AT 800-666-3863 x 458.**



## AUDIOCONFERENCE 2005

- January 12, 2005 - Wednesday** (FRE8798-0) *Achieving Dramatic Increases In Your Annual Fund*
- February 8, 2005 – Tuesday** (FRE8799-0) *Essential Presentation Skills for Fundraisers*
- March 10, 2005 – Thursday** (FRE8800-0) *Sky High! Major Gift Strategies to Engage & Excite Your Donors & Prospects*
- May 3, 2005- Tuesday** (FRE8801-0) *Raising More Money: Building the Bridge from Annual Fund to Endowment*
- June 7, 2005 – Tuesday** (FRE8802-0) *Beyond the Essentials of Acknowledgement and Recognition*
- July 14, 2005 – Thursday** (FRE8803-0) *Empowering your Board to Succeed in Fundraising v. Challenging Them to Fail*
- August 10 , 2005, Wednesday** (FRE8804-0) *How to Engage Your CEO in Fundraising*
- September 8, 2005 – Thursday** (FRE8805-0) *Endowment Fundraising: What Exactly Are We Afraid Of?*
- October 5, 2005 – Wednesday** (FRE8806-0) *Conflicting Values: Solving Ethical Dilemmas*
- December 8, 2005 – Thursday** (FRE8807-0) *The Widow’s Might...Understanding a Vital Source of current and Future Funding*

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- Audiotape/materials package \$130 (Shipped approximately two weeks following the program)**

*Please print clearly (especially the email address)*

Name \_\_\_\_\_ MemberID# \_\_\_\_\_ Title \_\_\_\_\_

Organization \_\_\_\_\_

- My Site is Sponsored by an AFP Chapter**

Chapter Name \_\_\_\_\_

StreetAddress \_\_\_\_\_

City \_\_\_\_\_ State/Province \_\_\_\_\_ Zip/Postal Code \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

Dialing-in instructions for the program as well as the URL for accessing your conference materials will be emailed to you. (You will need the Acrobat Reader, available free at [www.adobe.com](http://www.adobe.com))

- Please check here if you are unable to receive your materials via the web. We will ship a hard copy to you.

### Four ways to register:

**By FAX:** Complete form with credit card information and fax to 800-676-0734

**By PHONE:** Call 800-775-7654 please have your credit card information ready

**By MAIL:** KRM Information Services, Inc., PO Box 1187, Eau Claire, WI 54702-1187

**ONLINE:** Visit the individual session webpage for secure online registration form. The list of 2005 sessions can be found on our website at: [http://www.afpnet.org/education\\_and\\_career\\_development](http://www.afpnet.org/education_and_career_development).

**(Payment must accompany registration)**

**Method of payment (check one):**

- Check enclosed payable to KRM**

- MasterCard**

- VISA**

- Am. Ex.**

- Discover**

Card # \_\_\_\_\_ Exp. \_\_\_\_\_ Signature \_\_\_\_\_



**Association of  
Fundraising Professionals**  
**AUDIOCONFERENCE**  
**2005**  
*Educating Fundraisers in  
the 21st Century*

***Essential Presentation Skills for Fundraisers***  
**Robbe Healey**

**February 8, Tuesday (FRE8799-0)**

If you make fundraising presentations to major individual donors, foundation trustees or nonprofit organizations; make formal presentation to service or civic clubs, or teach and present at workshops and conferences, this Audioconference is for you.

Fundraising professionals are continually asked to be educators and mentors. They know their material cold, but may need to learn how to present information and teach--how to connect with their audiences. This session

will give you the tools to teach adults and improve your presentation skills.

**Learning Objectives:**

- Learn your learning style and how it influences your preferred presentation style.
- Learn how to integrate multiple techniques in order to reach the broadest possible audience.
- Learn to make audience friendly high impact presentations.

**About the Presenter:**

**Roberta (Robbe) A. Healey, MBA, CFRE, NHA** is Development Director for The Hickman, a Quaker Assisted Living community in West Chester Pennsylvania. She is also Principal of Farr Healey Consulting, LLC. She received her Bachelor of Science in Education from Northeastern University, Boston Massachusetts and MBA from Villanova University. She is currently pursuing a Ph.D. in Philanthropy and Leadership Studies at Union Institute and University, Cincinnati, Ohio. She is a member of the International Board of Directors of AFP (The Association of Fundraising Professionals). She was named the 2001 AFP/Greater Philadelphia Chapter Fund Raising Executive of the Year.

**Target Audience:**

All audiences

***\*\*\*Participation in a live session or use of an audiotape of the program qualifies for 1.5 points toward CFRE education requirements***

***The Audioconferences will be held at 1:00-2:30pm Eastern / 12:00-1:30pm Central  
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**To register please contact KRM Information Services, Inc., at 1-800-775-7654.  
*Questions about the content of the Audioconference? Please contact AFP at 703-519-8490.***



The Association of Fundraising Professionals
AUDIOCONFERENCE 2005

[ ] February 8, 2005 (FRE8799-0) Essential Presentation Skills for Fundraisers

Please check the appropriate box:

- [ ] Tuition \$130 (US) per AFP member site per session
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- [ ] Audiotape/materials package \$130 (US)
Shipped approximately two weeks following the program

Please print clearly (especially the email address)

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Organization \_\_\_\_\_
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[ ] Please check here if you are unable to receive your materials via the Web. We will ship a hard copy to you.

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\*\*\* Payment must accompany registration and must be paid in U.S. funds

Method of payment (check one):

- [ ] Check enclosed payable to KRM
[ ] MasterCard [ ] VISA [ ] Am. Ex. [ ] Discover

Card # \_\_\_\_\_ Exp. \_\_\_/\_\_\_ Signature \_\_\_\_\_

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Questions about the content of the Audioconference? Please contact AFP at 703-519-8490.

# Association of Fundraising Professionals

## Program Evaluation

*This form is electronically tallied. Please mark only one for each question.  
Do not mark outside the boxes.*

**Achieving Dramatic Increases In Your Annual Fund**

**January 12, 2005  
Event ID: 5012**

<b>Scale Definition:</b>	<b>P - Poor</b>	<b>F - Fair</b>	<b>G - Good</b>	<b>VG - Very Good</b>	<b>E - Excellent</b>
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	P	F	G	VG	E
1. Overall rating of program.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Similarity of actual program content to advertised content.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Ease of Registration.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Audio quality of virtual seminar.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Presenter: Overall Effectiveness**

5. Stanley Weinstein .....

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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**Participant Information**

6. How many people listened at your site?

1   
  2   
  3   
  4   
  5   
  6-10   
  11-15   
  16-20   
  21+

7. Would you participate in another virtual seminar?.....

<input type="checkbox"/>	<input type="checkbox"/>
Y	N

What was your overall impression of the program and the virtual seminar format? Additional Comments?

x

x

Name of participant (optional): \_\_\_\_\_

**PLEASE FAX COMPLETED FORM TO 1-800-472-5138**  
**Please use the fine or superfine setting on your fax machine.**