Fundraising Basics: Developing an Effective Fund Development Program

January 13, 2011
NAPCS Master Class

Presented by: Rhonda Fischer, NAPCS and Lyman Millard, Citizens Academy and Breakthrough Charter Schools
Presentation Overview: What to Expect

• A review of the basics
• Development of a case statement - group activity
• Important reminder…There is no “magic bullet” or “one size fits all” approach to fund development!
Sources of Funding

• In general, funding can be secured from three main sources:
  – Foundations
  – Corporations
  – Individuals
Foundations: A few things to know

• **Must Distribute 5% of Corpus**
  - Required each year to make qualifying distributions for charitable purposes equal to or exceeding 5% of the fair market value of its net investment assets

• **Specific Areas of Interest**
  - Important to align your organization’s mission and activities with the Foundation’s specific area(s) of interest.

• **Geographic Focus**
  - Some foundations have fund on a national level but many have very specific geographic interests.
The Downside of Foundation Giving

• Highly Competitive
  – Many non-profits seeking same pool of funding

• Restricted Funds
  – In 2008, over half of grants provided program support; general support accounted for 19.2% of giving (source: The Foundation Center, *Foundation Giving Trends*, 2010)

• Proposals by invitation only
  – In many cases, you CANNOT submit an unsolicited proposal.
Foundations: The Approach

• Build Relationships with Staff/Board
  o Utilize your Board in making connections.

• Develop a Compelling Ask
  o Be specific and outcome focused; align with the Foundation’s mission

• Timing
  o Research a foundation’s grant cycle (usually anchored by Board meetings) and prepare accordingly.
Foundations: Resources

• Free Tools:
  – Foundation Center (FC Search)
    [www.fconline.org](http://www.fconline.org)
  – Guidestar
    [www.guidestar.org](http://www.guidestar.org)
Foundations: Resources, cont’d.

• There are also more comprehensive tools available for a fee. Examples include:
Corporations

• Similar to Foundations
  – Especially in terms of geographic focus and specific program interests

• Generally Smaller Grants

• Shifting Focus to Matching Gifts
Individuals

WHY?

It’s Where the Money Is
Nearly three-fourths of the $313 billion in annual giving comes from individuals.

SOURCE: Harvard Business Review
Individuals give twice as much when they feel a personal connection to a cause.

SOURCE: Paul Slovic, University of Oregon
Individuals
People Give to People

Establish personal connections with prospective donors through:

- You
- Board members
- Volunteers
- Friends (including current donors)
Individuals

3 Types of Individual Fundraising:

• Special Events
  o less applicable to associations

• Annual Appeal
  o Build awareness while raising revenues

• Major Gifts
  o Most bang for your buck
Special Events

• Golf Outings, Receptions, Galas

• Raise Funds

• Raise Organization’s Profile
Special Events...the Downside

• Resource Intensive
  o A Lot Staff and Volunteer Time
  o Initial Investment for printing, food, and rentals

• Small Bang for Buck

• Limited Number of New Supporters
Individuals

Communication is Critical

• Develop relationships

• Develop credibility

• Develop revenues
Donor Communications
“Rolling Thunder”

Develop Year-Long Plan with Multiple Communications (print and electronic) to:

• Stay “Top of Mind”
• Continue to Prove Your Value
• Educate Potential Donors
Donor Communications
Types

• Newsletters/Annual Reports
  o Always include a response envelope

• Press Clippings
  o Anytime your in the news/big stories

• Calls to Action
Annual Appeal

- Stable source of unrestricted funds, even in an economic downturn
  - Citizens Academy’s revenues up 7% in FY2010

- Build awareness and support

- Identify major donor prospects
Annual Appeal
Board Role

• Integral part of fiduciary responsibility

• Make a personally meaningful contribution

• Help identify new donor prospects and make the ask, when appropriate
  o Peer to peer solicitation
Annual Appeal
Board Role

• **Provide strategic guidance**
  - Approve the planning
  - Approve letter and materials
  - Personalize letters to their contacts

• **Ensure staff accountability**
Annual Appeal

Staff Role

• Manage the process
• Cultivate relationships
• Track and report results
• Make the ask, when no one else is positioned to do so
Developing an Annual Appeal

Build your mailing list by getting contacts from:

- Board members/volunteers
- “Friends” and current supporters
- Civic contacts
- Buy Lists from marketing firms
Annual Appeal Letter

• Usually in mid-late November

• Part of donor communications cycle

• No letters to major donor prospects
  o Risk offending with mass appeal approach
  o Risk getting $500 when they could give $5,000
Annual Appeal Letter

• Brief
  o One page only (more won’t be read)

• Tell Your Story
  o Personal, direct, compelling – punchy, not flowery

• Make the Ask
  o Be polite, be direct, ask for money
Annual Appeal Letter

• Addressed to the individual

• Personal note on the letter
  o Board member, volunteer, or the director

• Follow-up phone call
  o Especially for key contributors
Annual Appeal

Inserts

• Color insert that reinforces the message in the letter

• Response envelope with giving suggested levels
Annual Appeal

Front

Picture of Students: People give to people

Suggested Giving Levels: What do their contributions make possible

Results: Back up your claims with data

Back

We could not do it without YOU.

- $25: Gives a student the school supplies that they need to succeed this year.
- $50: Gives a child who is below grade level one year of extra tutoring.
- $100: Gives a student instruction from a classroom teacher on Saturdays.
- $250: Gives a student one year of an after-school enrichment program.
- $500: Gives an at-risk child six weeks of instruction this summer.
- $1,000: Makes up the difference between our funding and the actual cost of meeting the needs of one student.
Annual Appeal
Response Envelope

Suggested Giving Levels

Employer Matching Gift Reminder

Contact Information

Email

Size: # 6 3/4
Annual Appeal
Acknowledgements

• Send thank you letters with amount within 24 hours of receiving gift

• Personalize letter with a note

• Include IRS “no goods and services” statement
Annual Appeal

Lapsed Donors

• Technical term: SYBUNT or LYBUNT
  o Some/Last Year But Not This

• Personalize letter with personal note
  o 6 months after appeal mailing

• Thank them for past generosity, ask for renewed support
Annual Appeal

Goals

- Renewing donors – 80%
- Upgrade gifts – 20%
- Renewal of first-time donors – 50%
- New donors – 10-20%
- No gifts in 5 years – remove from list
Major Gifts

Any gift of a significant amount that requires a personal solicitation

• Small-medium nonprofits = $1,000 +

• Universities = $25,000=$100,000 +
Major Gifts

Moves Management Strategy

• Create multiple points of contact with a potential donor

• Build the relationship
  o Get to know the prospect and their interests

• Ask for money only after several contacts
Major Gifts
Stage 1 - Introduction

• At “friend-raising” receptions, other events
• Through board members or “friends”
• Introduce them to your organization and get their contact information
Major Gifts
Stage 2 - Education

• Individualized letter and general mailings

• Educate the prospect about your cause

• Research prospect and their giving capacity
  o What other organizations do they support?
  o At what amounts?
Major Gifts
Stage 3 - Cultivation

• Face-to-face meeting with prospect
  • Their place or yours (or at a school)

• Find out their interests

• Determine how your organization could best fit into their giving priorities
Major Gifts
Stage 4 - Solicitation

• Solicitor should be the person the prospect finds most difficult saying no to

• Tailor the ask to the prospect’s interests

• Suggest a specific amount
  o Based on donor research
Donor Tracking

Donor data is critical to individualizing asks and planning for next year. Record:

- All gifts, including the reason
- All connections between donors
- All contacts with donor
Donor Tracking Software

• Blackbaud Rasier’s Edge
  - Industry leader
  - Geared for larger shops
  - Very expensive

• Donor Perfect Online
  - Good and Cheap
Resources

• Association of Fundraising Professionals - www.afp.org

• Local Fundraising Counsel
  Beware of contingency consultants - quick results, not a sustainable program
Questions?
What is a Case Statement?

• A good case statement must be one that grabs a prospective donor’s attention, and then offers a solid reason for investing in a program.
• Should appeal to a wide range of your supporters or stakeholders.
What should it accomplish?

- According to Bernard Ross and Clare Segal in *The Influential Fundraiser*, a good case needs to answer these questions:
  1. What is the need?
  2. What evidence is there that this is a pressing need?
  3. How is your organization uniquely qualified to tackle this need?
  4. What will be the benefits of your action?
  5. What are the negative consequences if you fail?
Group Activity

- **Goal:** Create the foundation for a solid case statement for CSOs in general, and your CSO specifically.
- Break into groups to answer the five questions that a good case statement should answer.
- Report back to the group.
Any final questions?

Thank you!

Rhonda Fischer – rhonda@publiccharters.org
Lyman Millard – lyman@citizensacademy.org
Developing a Strong Case Statement – a brainstorming activity

In your groups, brainstorm and answer the following questions:

1. What is the need?

2. What evidence is there that this is a pressing need?

3. How is your organization uniquely qualified to tackle this need?

4. What will be the benefits of your action?

5. What are the negative consequences if you fail?
Citizens’ Academy Development Cycle

June
- Development Committee Meeting – Current FY Closing Contributions & Analysis
- Board Meeting – Current FY Fundraising Report & Analysis
- Newsletter Mailing (last chance for current FY gifts)

May
- Proposal - $5k
- Proposal - $10k
- Board Meeting – Next FY Fundraising Plan Approved
- Benefit

April
- Proposal - $20k
- Proposal - $35k
- Development Committee Meeting – Current FY Report + Major Donors, Next FY Plan
- Board Meeting

March
- Proposal - $5k
- LYBUNT Letter & Materials
- LYBUNT Mailing
- LYBUNT Follow-up
- Newsletter Mailing

February
- Proposal - $5k
- Development Committee Meeting
- Board Meeting (LYBUNT Plan)
- Friend-Raiser

January
- Proposal - $2k
- Proposal - $3k
- Proposal - $3.5k
- Proposal - $5k
- Proposal - $7.5k
- Development Committee Meeting
- Board Meeting
- Benefit Host Committee Recruitment

Q1

Q2

Q3

Q4

July
- Foundation Reports
- Achievement Analysis and Messaging

August

September
- Proposal - $15k
- Proposal - $10k
- Proposal - $20k
- Development Committee – Fundraising Tactics Review
- Board Meeting – Fundraising Tactics Review
- Board Contact Sheets Distributed
- Newsletter Mailing (test scores, start of year)
- Friend-Raiser
- Benefit Chair Recruitment

October
- Proposal - $5k
- Proposal - $50k
- Board Contact Sheets – Reminder
- Board Contact Sheets – Due
- Board Contact Sheets – Follow-up
- Annual Appeals – Mailing
- Annual Appeals – deliver for personalization
- Development Committee Meeting – Annual Appeal materials + Follow-up plan
- Benefit Planning Committee Recruitment

November
- Proposal - $10k
- Proposal - $60k
- Board Meeting – Follow-up Plan
- Annual Report Finalized
- Annual Report Mailing

December
- Proposal - $10k
- Newsletter Mailing – Annual Appeal follow-up
- Development Committee Meeting – Current FY Major Donors & Next FY’s Foundations

Annual Appeal  Meetings  Communications  Foundations  Events

2010 NAPCS Annual Conference, Fundraising Basics, Presented by Rhonda Fischer and Lyman Millard
SOURCE: Lyman Millard, Citizens’ Academy, 216.791.4195
Citizens' Academy

2010 Individual Donor Plan

Individual giving typically follows the 80/20 pattern - 80% of your fundraising dollars come from the top 20% of your donor list, and 20% of your fundraising dollars come from the bottom 80% of your donor list.

In a typical year, individual fundraising should increase by 10% per category. For planning, this rule of thumb should be adjusted based on information that you have on specific donors in the major gifts category. For example, based on conversations, we knew that one of our $10,000 donors from 2009 could not give at that same level in 2010.

2010 Plan

<table>
<thead>
<tr>
<th>Gift Range</th>
<th># of Gifts</th>
<th>Range Total</th>
<th>Increase from 2009</th>
<th>% of Gifts</th>
<th>2009 Range Total</th>
<th>NEW GIFTS</th>
<th>2009 GIFTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>$20,000</td>
<td>1</td>
<td>$20,000</td>
<td>0%</td>
<td>0%</td>
<td>$15,000</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>$10,000</td>
<td>3</td>
<td>$30,000</td>
<td>-25%</td>
<td>1%</td>
<td>$40,000</td>
<td>-1</td>
<td>4</td>
</tr>
<tr>
<td>$5,000</td>
<td>5</td>
<td>$25,000</td>
<td>25%</td>
<td>2%</td>
<td>$20,000</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>$2,500</td>
<td>8</td>
<td>$20,000</td>
<td>14%</td>
<td>3%</td>
<td>$17,500</td>
<td>1</td>
<td>7</td>
</tr>
<tr>
<td>$1,000</td>
<td>23</td>
<td>$23,000</td>
<td>10%</td>
<td>9%</td>
<td>$21,000</td>
<td>2</td>
<td>21</td>
</tr>
</tbody>
</table>

% Gifts | % $
---------|--------
16%      | 81%

<table>
<thead>
<tr>
<th>Gift Range</th>
<th># of Gifts</th>
<th>Range Total</th>
<th>Increase from 2009</th>
<th>% of Gifts</th>
<th>2009 Range Total</th>
<th>NEW GIFTS</th>
<th>2009 GIFTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>$500</td>
<td>13</td>
<td>$6,500</td>
<td>8%</td>
<td>5%</td>
<td>$6,000</td>
<td>1</td>
<td>12</td>
</tr>
<tr>
<td>$250</td>
<td>36</td>
<td>$9,000</td>
<td>9%</td>
<td>15%</td>
<td>$8,250</td>
<td>3</td>
<td>33</td>
</tr>
<tr>
<td>$100</td>
<td>75</td>
<td>$7,500</td>
<td>10%</td>
<td>31%</td>
<td>$6,800</td>
<td>7</td>
<td>68</td>
</tr>
<tr>
<td>$50</td>
<td>80</td>
<td>$4,000</td>
<td>11%</td>
<td>33%</td>
<td>$3,600</td>
<td>8</td>
<td>72</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>244</strong></td>
<td><strong>$145,000</strong></td>
<td><strong>7%</strong></td>
<td><strong>100%</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

% Gifts | % $
---------|--------
84%      | 19%

2010 Results (as of 6/7/2010)

<table>
<thead>
<tr>
<th>Gift Range</th>
<th># of Gifts</th>
<th>Range Total</th>
<th>Increase from 2009</th>
<th>% of Gifts</th>
<th>2009 Range Total</th>
<th>NEW GIFTS</th>
<th>2009 GIFTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>$20,000</td>
<td>1</td>
<td>$20,000</td>
<td>0%</td>
<td>0%</td>
<td>$15,000</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>$10,000</td>
<td>2</td>
<td>$20,000</td>
<td>-50%</td>
<td>1%</td>
<td>$40,000</td>
<td>-2</td>
<td>4</td>
</tr>
<tr>
<td>$5,000</td>
<td>6</td>
<td>$32,500</td>
<td>62%</td>
<td>3%</td>
<td>$20,000</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>$2,500</td>
<td>11</td>
<td>$27,500</td>
<td>57%</td>
<td>4%</td>
<td>$17,500</td>
<td>4</td>
<td>7</td>
</tr>
<tr>
<td>$1,000</td>
<td>23</td>
<td>$23,500</td>
<td>12%</td>
<td>9%</td>
<td>$21,000</td>
<td>2</td>
<td>21</td>
</tr>
</tbody>
</table>

% Gifts | % $
---------|--------
17%      | 80%

<table>
<thead>
<tr>
<th>Gift Range</th>
<th># of Gifts</th>
<th>Range Total</th>
<th>Increase from 2009</th>
<th>% of Gifts</th>
<th>2009 Range Total</th>
<th>NEW GIFTS</th>
<th>2009 GIFTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>$500</td>
<td>22</td>
<td>$11,000</td>
<td>83%</td>
<td>9%</td>
<td>$6,000</td>
<td>10</td>
<td>12</td>
</tr>
<tr>
<td>$250</td>
<td>29</td>
<td>$7,250</td>
<td>-12%</td>
<td>12%</td>
<td>$8,250</td>
<td>-4</td>
<td>33</td>
</tr>
<tr>
<td>$100</td>
<td>78</td>
<td>$7,800</td>
<td>15%</td>
<td>31%</td>
<td>$6,800</td>
<td>10</td>
<td>68</td>
</tr>
<tr>
<td>$50</td>
<td>79</td>
<td>$3,950</td>
<td>10%</td>
<td>31%</td>
<td>$3,600</td>
<td>7</td>
<td>72</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>252</strong></td>
<td><strong>$153,500</strong></td>
<td><strong>20%</strong></td>
<td><strong>100%</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

% Gifts | % $
---------|--------
83%      | 20%

2010 NAPCS Annual Conference, Fundraising Basics, Presented by Rhonda Fischer and Lyman Millard

SOURCE: Lyman Millard, Citizens' Academy, 216.791.4195
### 2010 Major Donor Tracking Tool

<table>
<thead>
<tr>
<th>Name</th>
<th>Target/Gift</th>
<th>CA Contact</th>
<th>Phone</th>
<th>Previous Gift Date</th>
<th>Amount</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>$20,000 (1)</strong> 100% of goal</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Xxxxxx, Xxxx</td>
<td>$20,000</td>
<td>PW</td>
<td>###-###-###</td>
<td>6/30/09</td>
<td>$15,000</td>
<td>Meeting 10/20, pledge for 3/2010</td>
</tr>
<tr>
<td><strong>$10,000 (3)</strong> 67% of goal</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Xxxxxx, Xxxx</td>
<td>$10,118</td>
<td>PW</td>
<td>###-###-###</td>
<td>4/21/08</td>
<td>$10,000</td>
<td>Meeting 10/9, gift of stock to follow</td>
</tr>
<tr>
<td>Xxxxxxxx, Xxxxxx</td>
<td>$10,000</td>
<td>PW</td>
<td>###-###-###</td>
<td>11/15/08</td>
<td>$8,000</td>
<td>11/8 mtg, follow-up letter sent</td>
</tr>
<tr>
<td>Xxxxxxxx, Xxxx</td>
<td>$10,000</td>
<td>PW</td>
<td>###-###-###</td>
<td>1/19/09</td>
<td>$10,000</td>
<td>Meeting 12/1, will sponsor benefit (5/10K)</td>
</tr>
<tr>
<td><strong>$5,000 (1)</strong> 130% of goal</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Xxx, Xx</td>
<td>$5,000</td>
<td>SH</td>
<td>###-###-###</td>
<td>11/15/09</td>
<td>$5,000</td>
<td>Thru Family Foundation</td>
</tr>
<tr>
<td>Xxxxxxxx, Xxxxxx</td>
<td>$5,000</td>
<td>ER</td>
<td>###-###-###</td>
<td></td>
<td></td>
<td>Thru Family Foundation</td>
</tr>
<tr>
<td>Xxxxxxx, Xxx</td>
<td>$5,000</td>
<td>PW</td>
<td>###-###-###</td>
<td></td>
<td></td>
<td>12/1 mtg, pledge of end of year</td>
</tr>
<tr>
<td>Xxxxxx, Xxxx</td>
<td>$5,000</td>
<td>PW</td>
<td>###-###-###</td>
<td>5/15/09</td>
<td>$5,000</td>
<td>follow up phone call in April</td>
</tr>
<tr>
<td>Xxxxxxxx, Xxxx</td>
<td>$5,000</td>
<td>PW</td>
<td>###-###-###</td>
<td>2/9/09</td>
<td>$5,000</td>
<td>Meeting in December, 1 page proposal</td>
</tr>
<tr>
<td>Xxxxxxxx, Xxxx</td>
<td>$7,500</td>
<td>LM</td>
<td>###-###-###</td>
<td>5/30/09</td>
<td>$1,500</td>
<td>restricted for play equipment</td>
</tr>
<tr>
<td><strong>$2,500 (8)</strong> 139% of goal</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Xxxxxxxx, Xxxx</td>
<td>$3,046</td>
<td>PW</td>
<td>###-###-###</td>
<td></td>
<td></td>
<td>--</td>
</tr>
<tr>
<td>Xxxxxxxx, Xxxx</td>
<td>$3,000</td>
<td>DS</td>
<td>###-###-###</td>
<td>4/15/09</td>
<td>$2,500</td>
<td>Sh to follow-up letter</td>
</tr>
<tr>
<td>Xxxxxxxx, Xxxx</td>
<td>$3,000</td>
<td>PW</td>
<td>###-###-###</td>
<td>4/17/09</td>
<td>$10,000</td>
<td>12/15 - can’t give $10K, $ coming in April</td>
</tr>
<tr>
<td>Xxxxxxxx, Xxxx</td>
<td>$1,750</td>
<td>PW</td>
<td>###-###-###</td>
<td>12/10/07</td>
<td>$2,500</td>
<td>Letter in December with PW follow-up</td>
</tr>
<tr>
<td>Xxxx, Xxx</td>
<td>$1,500</td>
<td>PW</td>
<td>###-###-###</td>
<td>9/15/09</td>
<td>$1,200</td>
<td>Pledge made in November</td>
</tr>
<tr>
<td>Xxxxxxxx, Xxxx</td>
<td>$1,500</td>
<td>PW</td>
<td>###-###-###</td>
<td>10/21/08</td>
<td>$1,000</td>
<td>Perry to follow-up 10/28</td>
</tr>
<tr>
<td>Xxxxxxxx, Xxxx</td>
<td>$2,500</td>
<td>JRS</td>
<td>###-###-###</td>
<td>7/15/07</td>
<td>$2,000</td>
<td>Head of XXXX XXXX Cap. Partners</td>
</tr>
<tr>
<td>Xxxxxxxx, Xxxx</td>
<td>$2,500</td>
<td>JRS</td>
<td>###-###-###</td>
<td>7/9/08</td>
<td>$2,500</td>
<td>JRS to make ask</td>
</tr>
<tr>
<td>Xxxxxxxx, Xxxx</td>
<td>$2,500</td>
<td>JRS</td>
<td>###-###-###</td>
<td>8/10/07</td>
<td>$2,000</td>
<td>JRS to make ask</td>
</tr>
<tr>
<td>Xxxxxx, Xx</td>
<td>$2,500</td>
<td>MG</td>
<td>###-###-###</td>
<td>1/1/09</td>
<td>$250</td>
<td>Letter sent, meeting 6/10</td>
</tr>
<tr>
<td>Xxxxxxxx, Xxxx</td>
<td>$2,500</td>
<td>JRS</td>
<td>###-###-###</td>
<td></td>
<td></td>
<td>--</td>
</tr>
</tbody>
</table>

| **$1,000 (23)** 106% of goal                        |             |            |       |                    |        |                                            |
| Xxxxxxxx, Xxxx     | $1,000      | PW         | ###-###-### | 8/15/09            | $1,000  | PW meeting 8/10, gift to follow           |
| Xxxxxxxx, Xxxx     | $1,000      | SH         | ###-###-### |                    |        | Letter sent 11/15                         |
| Xxxxxx, Xx         | $1,200      | SH         | ###-###-### | 1/15/09            | $1,200  | SH follow-up, pledge from fam. fdn.        |
| Xxxxxxxx, Xxxx     | $1,000      | LM         | ###-###-### | 12/30/08           | $1,000  | Letter sent in November                    |
| Xxxxxxxx, Xxxx     | $1,000      | LM         | ###-###-### | 12/15/08           | $5,000  | PW meeting 11/30, gift to follow          |
| Xxxxxxxx, Xxxx     | $1,000      | SH         | ###-###-### |                      |        | --                                         |
| Xxxxxxxx, Xxxx     | $1,000      | MG         | ###-###-### |                      |        | --                                         |
| Xxxxxxxx, Xxxx     | $1,000      | JRS        | ###-###-### |                      |        | --                                         |
| Xxxxxxxx, Xxxx     | $1,000      | PW         | ###-###-### | 12/28/07           | $2,200  | PW to ask in April                         |
| Xxxxxxxx, Xxxx     | $1,250      | PW         | ###-###-### |                      |        | --                                         |
| Xxxxxxxx, Xxxx     | $1,000      | PW         | ###-###-### | 5/12/06            | $1,000  | PW to call in October                      |
| Xxxxxxxx, Xxxx     | $1,000      | PW         | ###-###-### | 12/31/07           | $1,030  | Letter to follow-up in November           |
| Xxxxxxxx, Xxxx     | $1,000      | PW         | ###-###-### | 11/20/08           | $1,000  | Letter to follow-up in November           |
| Xxxxxxxx, Xxxx     | $1,000      | PW         | ###-###-### | 13/20/08           | $1,200  | Letter to follow-up in November           |
| Xxxxxxxx, Xxxx     | $1,000      | PW         | ###-###-### | 1/14/09            | $1,000  | Letter sent 1/10                          |
| Xxxxxxxx, Xxxx     | $1,000      | PW         | ###-###-### | 12/30/07           | $2,200  | PW to ask in April                         |
| Xxxxxxxx, Xxxx     | $1,250      | PW         | ###-###-### |                      |        | --                                         |
| Xxxxxxxx, Xxxx     | $1,000      | PW         | ###-###-### |                      |        | --                                         |
| Xxxxxxxx, Xxxx     | $1,000      | PW         | ###-###-### | 12/1/08            | $250    | PW ask in December                         |
| Xxxxxxxx, Xxxx     | $1,000      | LM         | ###-###-### | 9/21/09            | $1,000  | Letter sent in September                   |
| Xxxxxxxx, Xxxx     | $1,000      | LM         | ###-###-### | 10/27/08           | $3,000  | PW to meet in October                      |
| Xxxxxxxx, Xxxx     | $1,000      | DS         | ###-###-### | 12/8/08            | $1,025  | Sh to follow-up letter                    |
| Xxxx, Xx           | $1,000      | LM         | ###-###-### | 10/15/09           | $1,000  | LM letter in October                       |
| Xxxxxxxx, Xxxx     | $750        | PW         | ###-###-### | 1/5/09             | $1,000  | Letter in November                         |
| Xxxxxxxx, Xxxx     | $500        | PW         | ###-###-### | 1/3/08             | $500    | Meeting in January                         |
| Xxxxxxxx, Xxxx     | $500        | JD         | ###-###-### | 4/15/08            | $250    | JD to meet                                 |
| Xxxxxxxx, Xxxx     | $1,000      | JRS/PW      | ###-###-### | 12/30/08           | $250    | Letter in November                         |
| Xxxxxxxx, Xxxx     | $1,000      | MG         | ###-###-### | 1/29/08            | $1,000  | Letter and annual report sent in April     |
| Xxxxxxxx, Xxxx     | $1,000      | Enid/MAS?   | ###-###-### |                    |        | --                                         |
| Xxxxxxxx, Xxxx     | $1,000      | ER         | ###-###-### |                    |        | --                                         |

### Notes
- 2010 NAPCS Annual Conference, Fundraising Basics, Presented by Rhonda Fischer and Lyman Millard
- SOURCE: Lyman Millard, Citizens’ Academy, 216.791.4195