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MANAGEMENT

Description of Activity: ***** College did not have written gift acceptance policy which was creating confusion and conflicting “official” statements. The goal of this project was to provide the college, primarily the Development and Finance offices, with guidance on gifts.

Materials/Strategy Used: I requested gift acceptance policies from several other institutions. I also contacted CASE and AFP for information on gift policies. After analyzing these examples, I drafted a gift acceptance policy that followed legal and ethical guidelines and was appropriate for ***** College. The draft was presented to Vice President of the College and the planned giving officer; the final draft was approved by the Board of Trustees in June 2002.

The policy was reproduced for every staff member in every office that worked with donors or potential donors. A detailed table of contents covered: coordination of appeals for funds; processing and acknowledging gifts and pledges; types of gifts to be marketed and accepted; use of gifts; donor recognition; and other general policies.

Having a written gift policy has expedited the processing of gifts because many questions are answered in the policy and most processing has become routine. For more complicated gift acceptance issues as described in the policy, the Gift Acceptance Committee, established by the policy, is convened.

Outcome/Results Achieved: The primary purpose of the written policy on gift solicitation and acceptance is to ensure that ***** College can respond quickly and appropriately to all gift offers. A secondary goal is to maintain in one location, master copies of disclosure statements and other important documents that may be required by state and federal regulatory authorities.

The written policy ensured that the College was meeting its obligations to its donors, the public and the law through systemized documentation. Before the written policy was implemented, the information was maintained in a haphazard manner. The systems of the new written policy will enable statistical analyses to be conducted to support more sophisticated solicitations to individual donors, corporations and granting agencies.



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Description of Activity: Consolidation of ***** University Funding Requirements

Stated Purpose/Goal: To simplify the identification of funding requirements from university program managers in such a way that we could facilitate decisions on determining spending rates and also reduce the frequency of withdrawals from invested funds.

Materials/Strategy Used: Prepared a consolidated spreadsheet of requests from the previous year and, with the Board's endorsement, requested that the university president poll university program managers in the spring of each year. A comprehensive report of anticipated funding requests that would require that we withdraw funds from the investment pool would be developed.

Outcome/Results Achieved: Instead of piece-meal submission of requests during the year, the Board is now able to act on the basis of one report each spring to approve a spending rate and amounts for each endowment. This is done in sufficient time for us to then prepare a schedule of distributions that spaces withdrawals across the school year thereby permitted minimal incursions into the investment pool and providing the financial consultant a timeline for those distributions.

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**Description of Activity:** I implemented a program which integrated management of all capital campaign solicitation activity for a medium sized church.

**Stated Purpose/ Goal:** To correlate the capital campaign solicitation materials and tracking system so as to meet the different needs for multiple donor solicitation techniques and giving mechanisms among this economically, racially, and politically diverse congregation.

**Materials/Strategy Used:** Specialized training for solicitation volunteers enabled to utilize a uniform donor pledge card for a variety of types of contributors while the pledge card with information with ancillary materials as needed.

**Outcomes/Results Achieved:** The campaign exceeded its goal for many positive reasons but, among them was the utilization of the training and materials which facilitated over 30 gifts of appreciated stock! The key administrative secretary was able to track all types of gifts and give the campaign leadership clear reports on campaign activity in all campaign divisions.



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**Category 3 - COMMUNICATIONS**

**In this category, points are awarded for a major achievement in the communications field (such as an effective public relations program, a newsletter implemented to increase donor relations, or a marketing activity) that proved critical to the success of a fundraising effort.**

**Description of Activity:** Series of articles on wills in the donor newsletter of \*\*\*\*\* College entitled “The Educated Philanthropist.”

**State Purpose and Goal:** To provide education to donors about the importance of making a will and the ability to make a bequest to \*\*\*\*\* College through such a document.

**Materials/Strategy Used:** The articles provide practical steps for completing a will. The first article outlined the preparatory steps to take prior to the first meetings with the professional advisors that would draft the document. The second article dealt with common questions and myths about wills and the benefits of creating such a document and a charitable legacy. The third article presented a glossary of terms in order to ‘demystify’ the vocabulary of estate planning and included sample bequest language.

**Outcome/Results Achieved:** To date two people used the articles to walk themselves through the process of completing their wills and including \*\*\*\*\* College. We have used the articles as stand alone inserts in our planned giving portfolio. They have been mailed or used in face to face solicitations on 17 occasions. They are in the process of being reprinted for the coming year.

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Description of Activity: Golf Course Newsletters: two letters were used in order to promote participation of corporate sponsors in the annual golf tournament. One was sent prior to the event and one following. Pre-event newsletter profiled the organization and post event newsletter recognized sponsors and published results.

Stated Purpose/Goal: to increase net revenue of tournament by 25% in 1999

Materials/Strategy Used: pre-event newsletter mailed to all current corporate sponsors and mailing list of 1500 key business areas. It also included a registration form. Additional publicity would hopefully bring new sponsors.

Outcome/Results Achieved: net tournament proceeds went from \$32,000 to \$77,000.
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**Description of Activity:** While COO of \*\*\*\*\*Development Foundation, I planned and executed series of Estate Planning/Planned Giving seminars for the community as means of initiating that program for\*\*\*\*\*.

**Stated Purpose/Goal:** To establish relationships with regional professionals who advised donors regarding estate plans. To place educational and transactional materials in the hands of potential donors and financial planners. To increase awareness of \*\*\*\*\* as vehicles for donors to achieve their own financial goals while simultaneously helping the community meet its healthcare service needs.

**Materials/Strategy Used:** Set up a series of early morning breakfasts for the community's "financial gatekeepers" (CPA's, lawyers, bank trust officers, financial planners) and later morning meetings for retirees. Each group received materials especially tailored to their needs that explained how \*\*\*\*\* could be used to achieve their financial and charitable goals.

**Outcome/Results Achieved:** Attendance by professionals and retirees exceeded our expectations. All three stated purposes were met and \*\*\*\*\*were positioned top-of-mind as potential planned giving vehicles and the presentations effectively launched \*\*\*\*\*'s Estate Planning Program. In the ensuing months, we did receive more calls from local lawyers inquiring about some specifics for transactions. Due to the confidential nature of establishing estate plans however, and due to the long term nature of the estate plan's fruition, we were not able to directly track any specific seminar to a specific gift. The consensus among the senior \*\*\*\*\*staff was that the seminars had a positive "seeding" effect for increased planned gifts from the community.

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Description of Activity: Coffee Break Project: direct mail campaign in which a small box was mailed to a group of former donors. Inside the box were two coffee mugs and a small gourmet coffee.

Stated Purpose/Goal: To encourage response to a follow up phone call to re-invoke former donors. Goals: re-establish contact with 15 donors and cover all costs with sponsorship contributions.

Materials/Strategy Used: The mugs and coffee conveyed the idea of two friends gathering over a cup of coffee to talk about the *****. Personal attention would hopefully break the ice of a cold contact.



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Outcome/Results Achieved: 18 contacts were successfully achieved which later resulted in contributions. Coffee was donated by **** and \$1,000 corporate sponsor fee covered packaging costs, postage and two mugs.

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**Description of Activity and Stated Purpose:** To increase the constituency of support a consultant to The Senior Center in Medium-Sized City, GA recommended that the Board of Directors cultivate children of aging parents to boost participation and fundraising.

**Materials/Strategy Used:** It was determined that civic minded women in their fifties would be a relevant target market. Several of the current Board members were sustaining members of the Junior League and used their contacts in this organization and the community to create the initial mailing list. These types of women are energetic volunteers and have the means and interest to be donors.

The objective was to increase our name recognition, provide information to the community about the Center’s programs and services for the elderly, interest eligible volunteers, and interest potential donors.

The Board planned a luncheon. Board members contributed to the cost of the food; staff and Board members prepared the food; and a senior adult contributed the use of her home.

We developed the mailing list of about 100 women with input from the Board. I designed an attractive invitation. In the mailing we included information about the Center, past issues of our newsletters and a list of resources for the elderly.

**Outcome/Results Achieved:** Thirty-eight women attended the luncheon. From the attendance and resulting mailing contacts, one new corporate sponsor was realized and four speaking engagements were set up which will increase our name recognition, five new people volunteered and seven potential clients were added to our mailing list. In addition, all of the original 100 invitees were later solicited for a contribution and 20% responded with gifts totaling \$380. The success of this project has encouraged the Board to have this become an annual event and to explore the possibility of an event for another target audience- an “I Remember Mama” brunch for men and their Mothers.

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Description of Activity: Presentation to Senior Faculty and Administration of ***** University

Stated Purpose/Goal: Provide information on fundraising policies and practices, investment practices and results to identify ways senior university leaders can improve their own fundraising

Materials/Strategy Used: Power Point presentation with handouts

Outcomes/Results Achieved: Deans of the College of ***** and of ***** implemented some of the recommendations and increased their annual gifts by 15%. The College of ***** added an endowment as a direct result of follow-up suggested during the presentation.

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**Description of Activity:** A values based estate planning questionnaire was created for use in planned giving solicitation.

**Stated Purpose/Goal:** To establish a donor-focused model to be utilized in face to face solicitation of planned gifts.

**Materials/Strategy Used:** The questionnaire was based on research of publications through Scott Fithian’s articles, workshops and book; articles on the Planned Giving Design Center; and documents for the ethical wills project. The questionnaire gave professional advisors and staff on the \*\*\*\*\* Heritage Society Committee a set of phrases which they could realistically use when cultivating or soliciting planned gifts.

**Outcome/Results Achieved:** The questionnaire has been adapted for use to date with seven face to face solicitations. It became one of the reference handouts for use in two workshops on planned giving for the public with 47 combined registrants. Evaluations indicated that from 6 people cited the values based concept as a factor that set \*\*\*\*\* College preferentially from other nearby charities.

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Stated Purpose/Goal: To establish relationships with regional professionals who advised donors regarding estate plans. To place educational and transactional materials in the hands of potential donors and financial planners. To increase awareness of ***** as vehicles for donors to achieve their own financial goals while simultaneously helping the community meet its health care service needs.

Materials/Strategy Used: Set up a series of early morning breakfasts for the community’s “financial gatekeepers” (CPA’s, lawyers, bank trust officers, financial planners) and later morning meetings for retirees. Each group received materials specially tailored to their needs that explained how SCCMC & SCCDF could be used to achieve their financial and charitable goals.

Outcomes/Results Achieved: Attendance by professionals and retirees exceeded our expectations. All three stated purposes were met and ***** were positioned top-of-mind as potential planned giving vehicles and the presentations effectively launched *****’s estate planning program. In the ensuing months, we did receive more calls from local lawyers inquiring about some specifics for transactions.

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**Description of Activity:** Launched a new community-wide newsletter.

**Stated Purpose/Goal:** To modernize the outdated look of hospital materials, signage, etc. The effort was critical to enhancing credibility of the facility during the final years of a capital campaign and essential precursor to increased annual appeal solicitations.

**Materials/Strategy Used:** For the first time in the hospital’s history, I utilized purchased targeted mailing lists for every zip code in the primary and secondary service areas. Thus we were able to reach all potential users of the facility and potential donors. We also utilized the newsletter to carry the annual report, non-individualized annual appeal pitch, and annual appeal reply envelope.

**Outcomes/Results Achieved:** Attendance at fundraising special events increased as did annual appeal donations. The hospital credited the increase to heightened awareness of the hospital and its programs.