

*Section***One**

How To *Use This Kit*

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Materials and Format

In your library, the Fundraising Training Kit will help to prepare the groundwork for planning your library's fundraising campaign.

The material has been organized to provide the user with the tools to identify the reasons for fundraising and the ethical issues that need to be considered with respect to fundraising. The kit also identifies the key strategies in fundraising and provides a step-by-step guide to help you get started on a major fundraising campaign.

The Fundraising Training Kit can be used as a self-study module or as part of a Board meeting or seminar with trustees, friends of the library/ volunteers and staff.

Exercises

The Fundraising Training Kit provides the foundation for discussion about fundraising and the exercises assist with the preliminary planning of a fundraising campaign.

During the seminar or meeting the group will undertake a number of exercises including:

- Do an Audit of Your Own Institution
 - Outline of the Case for Support
 - Earning Credibility
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Tips on Preparation For The Seminar/ Meeting

Before the seminar/meeting:

- send memo announcing seminar/meeting; including rationale;
- the group leader should read and become familiar with appropriate handouts and exercises
- duplicate print material and give/send it to seminar/meeting participants in advance of the seminar
- duplicate handouts (use three-hole punched paper if you distribute three-hole note books)
- book meeting room
- arrange tables/chairs in the room to facilitate discussion
- prepare name tags, if needed

Fundraising *Kit*

Equipment/supplies needed:

- Flip chart and pad
- Marking pens (at least two different colors)
- Masking tape
- Name tags, optional

Have fun!

Learning Objectives

After you have completed working through this training kit, you should be able to:

1. Identify the reasons for fundraising.
2. Understand Board and staff roles in fundraising.
3. Identify ethical issues that need to be taken into consideration with respect to fundraising.
4. Know how to position your library most effectively for fundraising.
5. Define the purpose of a feasibility study.
6. Determine the human resources required for a fundraising program.
7. Determine the costs of fundraising.
8. Identify the various types of potential funders for your library.
9. Develop a list of potential funders (prospects) for your library.
10. Build a case for support.
11. Develop ways to solicit funds effectively.
12. Recognize the importance of thanking donors for their contributions.
13. Describe popular fundraising techniques, including activities or events, direct mail, and telemarketing.

Key Terms

Fundraising	Case for Support
Development Program	Direct Mail
Positioning	Telemarketing
Feasibility Study	Annual Giving Program
Development Staff	Capital Campaign
Foundations	Planned Giving
Prospect Research	Charitable Status
Upgrading Donors	