

FUNDRAISING 101



Meet Us




ABOUT SUMMA

Revolutionary Fundraising Platform

Summa is an innovative and flexible fundraising technology platform designed to help nonprofit organizations of all sizes raise awareness, drive donor acquisition, boost donor retention, reduce workload, and make data-driven decisions.

GETTING STARTED




FLORIDA DEPARTMENT OF STATE
DIVISION OF CORPORATIONS

INSTRUCTIONS FOR A PROFIT CORPORATION

The following are instructions, a cover letter and sample articles of incorporation pursuant to Chapter 607 and 621 Florida Statutes (F.S.).

NOTE: THIS IS A BASIC FORM MEETING MINIMAL REQUIREMENTS FOR FILING ARTICLES OF INCORPORATION.

The Division of Corporations strongly recommends that corporate documents be reviewed by your legal counsel. The Division is a filing agency and as such does not render any legal, accounting, or tax advice. This office does not provide you with corporate seals, minute books, or stock certificates. It is the responsibility of the corporation to secure these items once the corporation has been filed with this office. Questions concerning S Corporations should be directed to the Internal Revenue Service by telephoning 1-800-829-1040. This is an IRS designation, which is not determined by this office.

A preliminary search for name availability can be made on the Internet through the Division's records at www.sunbiz.org. Preliminary name searches and name reservations are no longer available from the Division of Corporations. You are responsible for any name infringement that may result from your corporate name selection.

Pursuant to Chapter 607 or 621 F.S., the articles of incorporation **must** set forth the following:

Article I: The name of the corporation **must** include a corporate suffix such as Corporation, Corp., Incorporated, Inc., Company, or Co.


A Professional Association **must** contain the word "chartered" or "professional association" or "P.A."

Article II: The principal place of business and mailing address of the corporation. The principal address **must** be a **street** address. The mailing address, if different, can be a P.O. Box address.

Article III: **Specific Purpose for a "Professional Corporation"**

Article IV: The number of shares of stock that this corporation is authorized to have **must** be stated.

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GOVERNMENT ANIMAL CONTROL



YES YOU CAN
FUNDRAISE

Yourself by setting up
infrastructure

Outside-finding the right
people to support

A hand-drawn diagram illustrating the components of reputation. In the center is an oval containing the word **REPUTATION** in blue capital letters. Six arrows point towards this central oval from the following words: **TRUST** (top-left), **INTEGRITY** (top), **HONOR** (top-right), **STATURE** (bottom-right), **HONESTY** (bottom-left), and **TRUTH** (bottom). A hand holding a black marker is shown at the bottom, pointing towards the central oval.

[illegible]

MARKETING AND FUNDRAISING GO HAND IN HAND

A DONOR BILL OF RIGHTS

PHILANTHROPY is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To assure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the not-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

I

To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.

II

To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.

III

To have access to the organization's most recent financial statements.

VI

To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.

VII

To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.

VIII

To be informed whether those seeking donations are volunteers, employees of the organization, or hired solicitors.

IX

- Donor bill of rights
- Code of ethics
- Fiscal/program transparency
- Trust of organization and people in it



CODE OF ETHICAL
STANDARDS

CREATE A CULTURE OF PHILANTHROPY

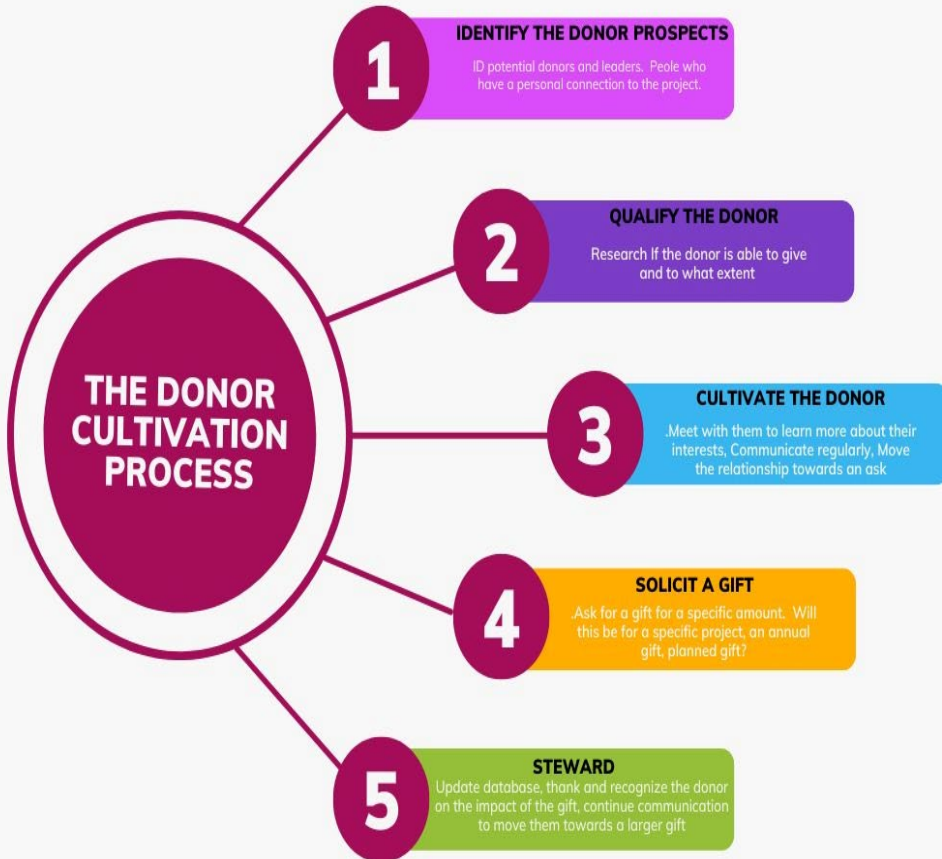


Donors Give to People

Everyone at the organization is a fundraiser

The boards role in fundraising

DONOR CULTIVATION



Donor Cultivation is the process of establishing and strengthening relationships with prospective and current donors over time

BUILDING THE RELATIONSHIP

The donor relationship journey



DONOR GOAL AND CAPABILITY

Pyramid of Donor Giving



Annual Giving

- General Appeal
- Unsolicited or Solicited
- Gift for specific reason
- Peer to Peer/In honor of
- Special Events
- General Public Support

Major Giving

- Major Gifts (identified by the organization)
- Endowments
- Campaigns
- Capital Campaigns
- Large Grants, Corporate gifts and Foundations

Planned Giving

- Bequest
- Planned Gifts

THE RULE OF 80/20



ANNUAL GIVING



- General Appeals
 - Direct Mail
 - Digital Campaigns
 - Crowdfunding
- Unsolicited Gifts
 - Over the Counter
- Restricted Gifts
- In-Kind Gifts/Wishlists
- Peer to Peer Giving
- Honor/Memorial Giving
- Social Enterprises

Starting a Major Gifts Program



1. Get leadership on board.



2. Recruit your fundraising team.



3. Establish tangible outcomes.



4. Draft your major gift proposals.



5. Implement a stewardship plan.



6. Assess your results and make improvements.

A major gift is different for each organization.

Major Gift solicitation involved matching the donor's interest with the needs of the organization. Each major gift is its own campaign.

Types of Major Gifts

- Can be an annual gift
- Can be a one time gift
- Planned gift/Endowments
- Part of a Campaign

Consider a separate plan and program for these types of givers

SPECIAL EVENTS



- Purpose
- Cost
- Time
- Corporate Gifts and Sponsorships
- Follow-Up



MARKETING AND FUNDRAISING GO HAND IN HAND



- Importance of Storytelling
- Branding
- Social Media with an Ask
- Website
- Emails
- Newsletter
- Collateral

DATABASE



- Donor research
 - Segmentation
- Keep Track
- Automate
- Acknowledge
- Ease of Donation and Payment Methods

UPCOMING PRESENTATIONS

Special Events-May 21

Yes, You Can Fundraise for an Animal
Control-June 4

The Business Side of Fundraising-June 18



CONTACT



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