

# **UNLOCKING THE MYSTERY**

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**“Starting, Keeping & Growing  
Donor Relationships”**



**Chester County Community Foundation**  
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# Essential Foundations of Fund Raising

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Excerpt from  
“Relationship Fundraising” by Ken Burnett

1. **People give to people.** Not to organizations, mission statements, or strategy.
2. **Fundraising is not about money.** It is about necessary work that urgently needs doing. Money is the means to an end.
3. **Fundraisers need to be able to see things through their donors’ eyes.** Or, to put themselves in their donors’ shoes.
4. **Fundraisers need to really understand their donors.** If they are to understand you, you must first understand them.
5. **Friend-making comes before fundraising.** Fundraising is not selling. Fundraisers and donors are on the same side.
6. **Fundraising is about needs as well as achievements.** People applaud achievement, but they will support a need.
7. **Fundraisers need to learn how to harness the power of emotion.** Fundraising has to appeal first to the emotions. Logic can reinforce the appeal.
8. **Offer a clear, direct proposition people can relate to.** Keep it simple and to the point.
9. **First open their hearts and minds.** Then they will open their wallets.
10. **Don’t just ask people to give.** Inspire them to give. Fundraising is the inspiration business.
11. **Share your problems as well as your successes with your donors.** Honesty and openness are usually prized more highly than expert opinion and apparent infallibility.
12. **You don’t get, if you don’t ask.** Know whom to ask, how much to ask for, and when.
13. **Present your organization’s brand image clearly and consistently.** It’ll pay you if your donors can readily distinguish your cause from all the others.
14. **Successful fundraising involves storytelling.** Fundraisers have great stories to tell and need to tell them with passion so as to inspire action.
15. **Great fundraising is sharing.** Share your goals and encourage full involvement. When donors become truly involved in your organization or campaign, great things happen.
16. **Always try to turn complaints into support.** The most loyal donor is the donor who has complained and received a satisfactory response.
17. **The trustworthiness of fundraisers and their organization is a reason both to start and to continue support.** Trust appears to increase in importance as people get older.
18. **Great fundraising requires imagination.** Too much fundraising looks like everything else.
19. **Great fundraising is getting great results.** If your results are mediocre, your fundraising probably is too.

## *FOUNDATIONS OF FUND RAISING CONTINUED*

20. **Always be honest, open and truthful with your donors.** Donors will not forgive you if you are less than straight with them.
21. **Avoid waste.** Donors hate waste.
22. **Technique must never be allowed to obscure sincerity.** As all actors know, you cannot fake sincerity.
23. **Fundraisers have to learn to talk with their donors where they are.** That is not necessarily where the fundraiser wants to be.
24. **Fundraisers and donors have a relationship of shared conviction.** This is much more important than their shared commercial interest.
25. **Great fundraising means being “fifteen minutes ahead.”** To keep just a little bit ahead you have to learn to spot opportunities and take (careful) risks.
26. **Fundraisers should learn the lessons of history and experience.** Anyone who wants to be an effective fundraiser needs first to do some homework.
27. **Always say “thank you” properly and often.** It is also a good idea to be brilliant at welcoming new donors when they first contact your organization.

# Nine Keys to Building Relationships

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Excerpt from “Relationship Fundraising” by Ken Burnett

- **Be honest.** If any business area should be honest, it is fundraising. The public expects fundraisers to be honest. Those that don't view fundraisers as inherently honest and trustworthy certainly don't give. So, it pays to be honest.
- **Be sincere and let your commitment show.** Donors are donors because they care enough to take action and support your cause. Let them see that you care too and that that is why you are on the same side, with a common concern and aim. Your commitment will then encourage them to go even further for the cause.
- **Be prompt.** Reply quickly and efficiently to any request. Answer letters the next day, or sooner, if possible. If the issue is important, telephone the donor and explain what action you are going to take. If it will take time to provide a full answer, write or telephone the donor quickly and say that an answer is being prepared and let them know when it expect it. Prompt response shows you take your donor's concerns seriously.
- **Be regular.** Regular planned communication keeps donors in touch, informed, and involved. If you are irregular in your communications be aware that other fundraisers are not so lax. They also have access to your donors, so they will be in touch when you are not.
- **Be interesting and memorable.** By their very nature, nonprofits have access to compelling materials. Use it to the full; present it well. Fundraising is all about telling stories. Make all your materials stand out for its interesting content, style, presentation and unforgettable visuals.
- **Be involving.** Don't allow donors to take a passive role. Ask for their opinions, contributions, and even complaints. Encourage feedback in any way that you can. Invite them to events, offer visits to projects. Make the dialogue as two-way as you possibly can.
- **Be cheerful and helpful.** Advertise your helpfulness. Never let donors feel that asking is a trouble. That is what you are there for – to help them. Teach customer care to all your colleagues.
- **Be faithful.** Always stick to your promises. Let donors see that you are honorable and trustworthy. Stand by your organization's mission and do not compromise what it stands for.
- **Be cost effective.** Donors expect and appreciate good stewardship of their gifts, but are generally well aware of the potential for false economies, which they dislike as much as conspicuous waste. Be open and informative, explain your reasons for financial decisions and show your donors that their money is in good hands.

# Cultivation Process

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The raising of philanthropic funds is very competitive. Donors have become increasingly selective in deciding which charities they will support and, in most cases, support organizations with which they have a relationship. Those organizations that have established and nurtured mutually satisfactory relationships with prospects and donors are most likely to succeed.

The cultivation program is the cornerstone of a relationship-based Development Program and is designed to foster and strengthen the relationship between the prospect/donor and the organization. It is the primary means of relationship-building and for that reason its importance cannot be overstated. An effective cultivation program is a requirement for major gifts, campaigns, planned giving and estate gifts, as well as continued support by donors over the years. It is the role of the Development Officer to work with the Executive Director/President/CEO, Board members and fund raising volunteers to assure that cultivation activities are occurring on a regular basis. The Development Officer is also responsible for maintaining and growing the relationship with the donor or prospect once it is established.

## INVITATION & ATTENDANCE

- (1) The cultivation process begins when an invitation is issued to a prospect or donor by a key contact person asking the prospect to attend a private luncheon or meeting. The contact person is someone who can reach and encourage the prospect to attend through their own personal influence. Prospect research and evaluation helps to identify these key individuals.
- (2) For Board recruitment and major gift development, the cultivation meetings are "private" with no other prospects in attendance. Cultivation activities directed at groups of prospects are suitable for mid-level gift solicitations, but not for Board recruitment or major gift solicitation.
- (3) There is no general rule as to which staff or Board member should attend the cultivation meeting. *Effectiveness and influence are the most important criteria.* Therefore, those attending the meeting should be known by or meaningful to the prospect. Most cultivation events will include both the leader of the organization (Executive Director/President/CEO), the Development Officer and, if appropriate, a representative of the Board as well as the person who made the initial contact, usually a volunteer, who serves as "host" for the event.

## MEETING ORGANIZATION

- (1) Cultivation meetings should be held at the organization whenever possible. This gives the prospect a better point of reference, enables the prospect to see firsthand the operations of the organization and creates a stronger identification and bond with the organization.
- (2) The best cultivation meetings are over food. Food provides a social milieu and encourages personal conversation which allows the representatives of the organization to get to know the prospect better, and helps the prospect feel at ease. The selection and presentation of food should be simple enough to show regard for the resources of the organization, but nice enough to demonstrate the importance and level of respect for the guest.
- (3) The Development Officer or designee should manage all of the details of the event including: food, parking, directions, room arrangements, materials, presentations or displays, and any other activity designed to assure a positive experience for the prospect and a positive reflection on the organization. In some situations, the Development Officer will need to provide transportation for the prospect. This is actually advantageous because it offers an opportunity to converse on a more personal basis.

## MEETING ORGANIZATION - Continued

- (4) Although the cultivation meeting or luncheon is structured and organized, it is actually quite informal, conversational, and pleasant. At all times, the guest should always be made to feel comfortable, welcome, and "at home."
- (5) The information presented during the cultivation meetings must answer key questions for the prospect. This information may be provided at one meeting or through a series of meetings depending upon the interests, time availability, and involvement of the prospect. When completed, the prospect should be knowledgeable of the purpose of the organization and its value to the community. Furthermore, the prospect should understand what he or she is being asked to do and the importance of his or her involvement and support.
- (6) Whenever possible, the verbal information should be supported by written documentation, especially as it relates to finances, utilization statistics, and service trends. This information should be included in the "cultivation kit" and can be referred to during the discussion process.

## REQUEST & RESPONSE

- (1) When appropriate, the final step of the process is to ask for acceptance of a Board position and/or gift, depending upon the purpose of the cultivation meeting. The question is usually presented by the person who is most effective, usually a volunteer and the person with whom the prospect has the strongest relationship. It should be noted that it may take several meetings and contacts to bring the prospect to this point of the discussion. The "ask" should be made only when the relationship has matured and the prospect is committed to the organization and likely to respond positively. Often the close or "ask" occurs at a time and place other than the meeting.
- (2) It must be remembered that *cultivation is not solicitation*. In many situations, the cultivation meeting is the first time that the prospect has visited the organization. Therefore, it may not be possible or prudent to request a gift or any formal involvement until the relationship has matured. However, it is also important to begin the process of engagement. The Development Officer or any other representative of the organization should ask the prospect to do "*just one thing*." By giving them something meaningful to do, it will start the process of involvement and allow for continued communication between the prospect and the organization. The "one thing" could be anything from calling another prospect, inviting someone to the organization, providing feedback on information, etc. The most important thing is to keep the lines of communication open and to start involving the prospect in the work of the organization. This continued involvement leads to a growing sense of commitment and a *sense of ownership* which is needed for major gifts and leadership recruitment.
- (3) When an "ask" is appropriate, the request can occur at a cultivation meeting or privately between the prospect and the solicitor at some other location and time. This determination is based on the comfort level of the prospect and person asking, and is different in each situation.
- (4) If the prospect answers the request affirmatively, he or she should be thanked immediately and formal letters of gratitude sent the following day by both the volunteer and organizational leadership. In addition, the contact person should also be thanked for the time and effort given on behalf of the organization. Should the response be negative, it is the responsibility of the Development Officer to find a way to continue to build the relationship and keep the prospect involved and informed about the organization's activities. Regardless, the prospect has given time to hear about the needs of the organization and should be thanked, as should the contact person. More than a few initial responses to the negative have become positive after the relationship is strengthened.

# Effective Letters of Gratitude

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Excerpt from “Donor Centered Fundraising” by Penelope Burk

1. The letter is a real letter not a preprinted card.
2. It is personally addressed.
3. It has a personal salutation (not “dear donor” or “dear friend”).
4. It is personally signed.
5. It is personally signed by someone from the highest ranks of the organization.
6. It makes specific reference to the intended use of funds.
7. It indicates approximately when the donor will receive an update on the program being funded.
8. It includes the name and phone number of a staff person whom the donor can contact at any time or an invitation to contact the writer directly.
9. It does not ask for another gift.
10. It does not ask the donor to do anything, (like complete an enclosed survey for example.)
11. It acknowledges the donor’s past giving, when appropriate.
12. It contains no spelling or grammatical errors.
13. It has an overall “can do” positive tone as opposed to a hand-wringing one.
14. It communicates the excitement, gratitude, and inner warmth of the writer.
15. It grabs the reader’s attention in the opening sentence.
16. It speaks directly to the donor.
17. It does not continue to “sell.”
18. It is concise – no more than two short paragraphs.
19. It is received by the donor promptly.
20. Plus, in some circumstances, the letter is handwritten.

# Development Roles

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## CEO/PRESIDENT

*Sets the course for the Development Program and inspires others to action.*

1. Serves as the leader of the Development Team, ultimately responsible for its success.
2. Serves as the key representative of the organization with Board, fund raising leadership, donors, prospects, and the community.
3. Develops “partnership” relationships with Board members and key volunteers responsible for fund raising, especially at the major gift level.
4. Works hand-in-hand with the Development Officer to assure that the Development Program is moving forward according to plan and schedule.
5. Determines organizational needs and priorities which serve as the platform for the goal and Case for Support.
6. Sets the direction and focus of the Development Program.
7. Presents the Development Plan to the Board to engender participation & support.
8. Educates Board members regarding their role in major gift fund raising as appropriate.
9. Participates in cultivation activities and is able to present an inspiring Case for Support.
10. Participates in solicitation activities as appropriate.
11. Responsive to donor needs and interests.
12. Participates in stewardship activities designed to strengthen relationships with key donors.
13. Willing to commit time and resources to assure the successful achievement of goal.

## BOARD MEMBER

*Key intermediary with prospects & community; sets philanthropic example for others to follow.*

1. Articulates vision, plans & need for charitable support and represents and advocates for the organization in the community.
2. Participates in the planning, provides meaningful input, and endorses the Development Plan and direction.
3. Participates in and supports Development activities.
4. Identifies & provides insights about prospects and potential sources of funds.
5. Uses personal influence to reach prospects and introduce them to the organization.
6. Participates in cultivation activities, often serving as key link between prospect and organization.
7. Participates in solicitation activities as appropriate.
8. Monitors fiscal, operations and programmatic activities of the Development Program and assures that all are in compliance with policy, plans & goals.
9. Gives generously and asks others to do the same

## **FUND RAISING LEADERSHIP & VOLUNTEERS**

*Volunteers who can both “give and get” major gifts.  
Volunteer leadership can be the “maker or breaker” for the Development Program*

1. Assists in the development of fund raising goals and strategy.
2. Provides insights about prospects and potential sources of funds.
3. Identifies and uses personal influence to reach prospects.
4. Participates in cultivation activities, often serving as key link between prospect and organization.
5. Participates, and often leads, solicitation of prospects at the major gift level.
6. Advocates for organization in the community.
7. Gives generously at a major gift level and asks others to do the same.

## **DEVELOPMENT OFFICER**

*Plans & implements the Development Program.  
Facilitates, fosters, inspires, augments, stewards & supports the relationship-building process.*

1. Participates in the creation of the Development Plan, facilitating participation by donors, volunteers & Board members.
2. Develops & implements strategies to achieve Development goals.
3. Participates in the creation of the Case for Support.
4. Identifies & researches prospects including individuals, foundations, corporations, public sector & other funding sources.
5. Facilitates contacts with prospects & donors & coordinates cultivation activities & follow-up.
6. Develops proposals, makes presentations & participates in cultivation & solicitation activities.
7. Responds to donor needs & manages relationships.
8. Maintains meaningful communications with donors & prospects.
9. Maintains accurate prospect & donor files.
10. Manages gift receipt, acknowledgement & recognition.
11. Serves as liaison with Board members, volunteers, prospects & donors.
12. Maintains professional demeanor & represents the organization to the community.

# Position Description

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## Chief Development Officer

The primary function of the Development Officer is the effective positioning and advancement of the organization to the philanthropic community. In concert with the President/CEO and Board, the Development Officer is responsible for the planning and execution of the Development Plan including major gift and planned giving programs, annual campaign, donor and prospect relations and other activities designed to secure philanthropic support.

### SPECIFIC RESPONSIBILITIES:

- 1. *Plan Development:*** Develops and implements the Development Plan to meet the immediate and long-term needs of the organization; presents plan to President/CEO and reports on its progress.
- 2. *Program Administration:*** Advances the philanthropic position of the organization through the management of various Development Programs including: major gifts and planned giving programs; annual campaign; capital campaign; foundation and grants development; donor and prospect relations.
- 3. *Major Gifts:*** Develops & oversees a relationship-based Development Program; manages and participates in campaign, planned giving, and major gift initiatives; serves as organization liaison to Board, fund-raising volunteers, donors and prospects; secures and works in collaboration with consultants, financial and legal advisors as required.
- 4. *Case Development:*** Works with the CEO to identify funding priorities; assists in the creation of the funding plan; writes compelling and inspirational case statement based on same and presents case during cultivation and solicitation meetings.
- 5. *Cultivation Program:*** Identifies prospects; develops cultivation plans and conducts lunches, receptions, meetings, & other cultivation activities for potential donors; participates in solicitation activities as appropriate.
- 6. *Donor Recognition:*** Develops donor recognition program; identifies list of proper naming and gift recognition opportunities for various interest areas; defines levels of giving; creates and administers policies for gift recognition and presents to CEO for approval.
- 7. *Cultivation Materials:*** Prepares cultivation and solicitation materials and publications including: case statements, proposals, grants, newsletters, brochures, videos, solicitation materials, and other collateral materials as needed.
- 8. *Donor Relations:*** Maintains an ongoing donor relations program with emphasis on major gift development; conducts personal visits, schedules luncheons and meetings; makes personal calls, produces newsletters, correspondence, and other forms of communication; responsive to donor needs and interests.
- 9. *Gift Processing:*** Establishes and enforces policies and accounting procedures for the proper receipt, acknowledgment, and posting of charitable gifts; assures the timely acknowledgment of gifts within 24-48 hours after receipt; assures accuracy of donor files.
- 10. *Community Representation:*** Serves as a representative of the organization in the community; participates in community events; makes presentations; seeks involvement in professional and civic organizations; identifies opportunities to strengthen the presence of the organization in the community.
- 11. *Ethics and Professional Standards:*** Maintains a professional demeanor in dress and behavior; treats people with respect and dignity; maintains all donor and prospect information in the strictest confidence.

# Relationship-Based Development

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## Essential Professional Characteristics

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The Development profession offers many career options. Grant Writing. Prospect Research. Annual Giving. Direct Mail. Event Management. Gift Receipt and Fund Management. All these require different skills and aptitudes on the part of the professional. The many opportunities in the Development field allow the professional to match their interests and abilities to an area where they can excel personally and as a member of a team.

Relationship-based fund raising has its own set of skills. Below is a list of traits and abilities that can help the Development Professional decide if relationship-based fund raising is his or her optimal career choice. Professionals with these interests and aptitudes are more likely to be effective, productive, and most of all, be happy about their work.

- **Enjoys People.** First and foremost, you must enjoy people. You will spend the majority of your time being with people of all walks of life and circumstances. It is important that you genuinely like and are interested in the people that you meet. Sincerity is important. Donors are quick to recognize a “slick” sales approach rather than honest and personal conversation.
- **Is open and sharing.** The Development Professional needs to be open with donors and collaborative. He or she must view fund raising as a true partnership between the donor and the organization, and as such, treat the donor as an important member of the organization. Once the organization accepts funds from donors, they have in essence created a sense of “ownership” by the donors, much as investors become an “owner” of the companies they support. The Development Professional needs to be open to sharing information – good and bad. He or she must be willing to respond honestly to donor questions and be accepting of the donor’s scrutiny of the organization.
- **Sees fund raising from the donor perspective.** Good relationship-builders understand where the donor is coming from. They are willing and able to put their own needs, deadlines, schedules and goals second, and give their primary attention to the needs of the donor. These Development Professionals are sensitive to the needs of the donor, respond appropriately, and intuit what the donor needs to feel satisfied with their relationship with the organization.
- **Can inspire others.** Fund raising is about moving a donor to action. It is about reaching the heart and helping the donor see how they can help make something wonderful happen. Fund raising is not about statistics, floor plans or budgets - it is about helping people. Good relationship-builders focus on the “people” impact of the gift, relating to donors on a deeply personal level that moves and inspires them to help.
- **Willing to take risks and can take a “no.”** Fund raising involves people, and when you bring people together with divergent backgrounds, interests and personalities, anything can happen. Not everything works. Not every effort will result in a long-standing relationship. Sometimes, “no” is the answer, even with the best effort. A good relationship-based Development Professional will still take the risk to forge ahead regardless of the obstacles because he or she appreciates where the donor is at and realizes that even with the best effort, it may not be the right time or place for that person to make a gift or get involved.
- **Confident and assertive.** A good relationship-based Development Professional must exhibit confidence in all activities. The donor looks to the Professional to guide them in their decision- making and then to effectively steward their gifts. The Professional must be confident in their knowledge and skills to be able to honestly address the donor’s interests and needs. He or she must also be willing to initiate contacts with donors and be ready to make the ask or to move the donor to higher levels of support when the time is right.

## CHARACTERISTICS - CONTINUED

- **Affirming to others.** A relationship-based Professional helps the people around them feel better about themselves and what they are doing. This can refer to the staff, the volunteer team or the donor. He or she helps others see the bigger picture, helping them to see beyond the obstacles to the positive outcome that is possible.
- **Positive thinker and cheerleader.** Relationship-based fundraisers are positive thinkers. They do not wallow in their problems or that of the organization, nor do they focus on the many reasons why they cannot raise funds. There are always more reasons to not raise money than there are to forge ahead. The relationship-based Professional focuses on the possibilities, not the barriers, and by doing so overcomes them.
- **Intuitive listener.** A good relationship-based Development Professional is always sensitive to the needs of the donor - but an excellent Professional can intuit the needs of the donor when they are not spoken. This is a valuable gift as it allows the Professional to know when it is time to leave the donor alone and give them space, and when it is time to strive for more involvement or support.
- **Can respond to change quickly.** Very few things in life go exactly as planned – that includes cultivation and solicitation. The Development Professional needs to be able to change plans in an instant based on the reaction of the donor to the conversation or request. This could include deciding not to ask, changing the focus of the ask, changing the amount, etc. Fund raising is an art, not an exact science. Therefore, the Development Professional needs to be responsive to the donor and be able to make adjustments, rather than forging ahead with the plan to potentially disastrous results.
- **Motivated by goals and accomplishments.** The relationship-based Development Professional likes to set and reach goals. These can include monetary goals or relationship outcomes. The Professional also knows how to use goals to motivate the donor to higher levels of support. He or she knows that the achievement of a goal is an opportunity to make the donor feel meaningful, and as such, is always willing to share the success with the donor, or even take a back seat to the donor when it comes to recognition of accomplishments. A seasoned Development Professional knows that success is not a solitary activity, but rather the result of many people working together.
- **Sees the big picture.** The effective Development Professional sees his or her work as a part of a larger effort and does not become myopic about their activities. Sometimes, to be effective in the long run, the Development Professional has to walk away from an opportunity or proceed with something that they do not entirely support. The Development Professional is an organizational representative and as such, must place the good of the organization over the needs of their own function.
- **Detail oriented.** Cultivation and solicitation is fraught with details. The tracking and completion of prospect research and donor information, follow-up activities, correspondence, meetings, presentations, gift management activities, acknowledgement and other activities need to be managed in the most professional way. This requires a strong sense of organization. An effective Development Professional is able to track these activities so that the plan moves forward according to schedule with all activities handled in the most accurate and professional manner.
- **Professional in demeanor.** Needless to say, the Development Professional must present a professional appearance and demeanor at all times. Many of major gift donors are conservative about style of dress and professional behavior. Many are formal and uncomfortable with instant familiarity. Regardless of the personal beliefs and personal style of the Professional, he or she respects the attitudes of the donor and presents themselves accordingly.
- **Confidential, honest and trustworthy.** The Development Professional, especially those involved with direct donor contact, must be confidential at all times. The donor must be able to trust the Professional to be discrete. Furthermore, the donor must feel that the Professional is honest and forthcoming at all times. Relationships cannot survive without trust and mutual respect.

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