

“Raise Money Faster”

Free Fundraising Coaching Session Instructions

Welcome to your Free *Fundraising Coaching Session*. We're delighted you desire to experience the benefits of fundraising coaching and encourage you to make the most of this opportunity.

Our goal is that through this *time* you will have a personal BreakThru in how you raise funds for your non-profit or ministry that results in a higher level of fundraising success and effectiveness in less time.

Research indicates that people who have a coach will achieve their goals up to seven times faster than those who don't. Andy Stanley says it best, "If you want to go farther faster, hire a coach."

Session Preparation:

We've included a Fundraising Effectiveness Wheel (FEW) exercise and brief questionnaire to prepare both of us for this complimentary session; it will only take 10-15 minutes to complete. These tools are designed to help focus our time so that by the end of our 45-minute session, you will have made progress toward increased funding.

Directions:

1. Fill in your responses in the tables on the second sheet (FEW), save the file to your hard drive. Also, complete the "Getting to Know You" sections on the last page and email a copy to me at gregg@BreakThruFundraising.com. For your protection, your information is held in complete confidence and never shared.
2. Print this and transfer your numbers (1 to 10) from the tables in the saved file to the appropriate section on the Fundraising Effectiveness Wheel at the top of the page by circling your score in the appropriate category on the wheel. After filling in the numbers, connect the dots to determine how well your wheel is balanced. Keep a copy handy to reference during our coaching session.

Next Steps:

Once your appointment has been scheduled, call my coaching line at 678-765-2727 for your session. For other communication, please call the main office number at 678-478-2000. Your coaching session will be held by a telephone coaching call. My availability is typically 9:00 a.m. to 5:00 p.m., Monday through Friday. With a little planning, we can help you to maximize the value of your coaching opportunity.

We're looking forward to making the most of our time together and helping you to increase your funding!

Blessings and much success,

Gregg J. Pawlowski

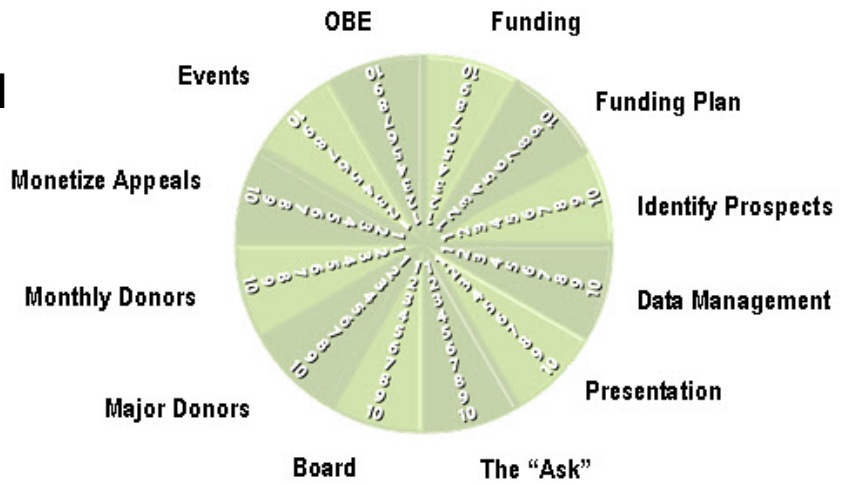
Gregg J. Pawlowski, PCC, CLTMC
President

Organization Name _____

Name _____

Fundraising Effectiveness Wheel

Rate how effective you are on a scale of 1 to 10 by writing the number in the table on this page and circling the number on the wheel: 1 very *ineffective* and 10 very *effective*. Connect the numbers to see where any imbalance occurs.



Effectiveness 1=low 10=high	Category Description
	Funding – How well did you do at raising your full “ideal” budget in the last 12 months?
	Funding Plan – How thorough is your written fundraising strategy or plan, and how well is it working?
	Identify Prospects – How effective are you at identifying prospective donors and filling your fundraising funnel?
	Data Management – How well does your donor/prospect database work to track all communication, next steps, etc?
	Presentation - How effective is your 1-on-1 fundraising presentation in engaging donors for support?
	The “Ask” – How comfortable and effective are you in “asking” for financial support?
	Board – How engaged and effective is your governance board in helping you raise funding for your ministry?
	Major Donors – How strong is your major donor support and how are you doing cultivating these relationships?
	Monthly Donors – How significant and consistent is your regular monthly donor support base?
	Monetize Appeals – How clear are your appeals in explaining what a donor’s gift(s) can do for those you serve?
	Events – How well do fundraising events compliment your individual donor fundraising efforts?
	OBE (Outcomes Based-Evaluation) – How well are you measuring before and after program results / outcomes?

Our Focus:

What do you need most right now (please be specific)? When do you need this by?
On a scale of 1 to 10, how committed are you to making this happen?
When you accomplish this one thing, what will be different about your non-profit or ministry? (please be specific)

Getting to Know You

In preparation for your Free Fundraising Coaching Session, please take a few minutes to help me get to know your organization to make the most of our Fundraising Coaching Session. (This is completely confidential.)

Approximately what year did you receive your IRS 501(c)(3) status?		
How many employees are on payroll?	Full-Time	Part-Time
Do you have a Development Department?	Department	Staff Size
How many do you have on your governing board including yourself?		
What percentage of your board members financially supports your organization?		
What was your most recent annual operating budget (12 months)?		
What was your total income from all sources in the same 12 months?		
What is the average amount you receive in regular monthly donations?		
What would you like your regular monthly donations to be?		
What software system do you use for finances and accounting?		
What software do you use for your donor / prospect management database?		
What are your Vision and/or Mission Statement(s)?		
Who is the target audience you serve?		
What else would you like me to know so I can help you make the most of our call?		