



## Lisa Verges

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### Annual Giving in One Hour a Week

#### Week 2 Worksheet

#### Set the Stage in Q1, January through March:

##### Database, Goals, & Compliance

- How are contact and gift records stored for donors and prospective donors?
- Should this method change in 2020? If yes, how?
- How did we ask for gifts last year? (e.g. mail, email, special event, or no effort)
- How did people make their gifts in 2019?  
(e.g. cash, goods or services, third-party support like online fundraisers or sales)
- What information do I need to capture the dollar total for 2019 and project a goal?
- How can I obtain that information and pull it together in one place?
- Raised in 2019: \$\_\_\_\_\_ 2020 desired goal \$\_\_\_\_\_
- Compliance check:
  - Is the organization a 501(c)3? If so, secure a digital copy of the IRS determination letter that you can furnish to donors as needed. If not, gifts are not tax-deductible.
  - Does the organization need to file a Form 990 or 990-EZ?  
  
If so, was the last filing made timely? Check here for information about requirements.
  - Is the organization registered in the state(s) where it is soliciting gifts? Most, not all, states require charities to register, and disclose that registration on any material asking for money.

[Check here for Pennsylvania's regulations. \(NEED LINK\)](#)