## **Apply to be a Client**

Start the process of becoming a Client by completing the following application. Please note you CANNOT save your responses and return to work on them at a later date. Feel free to use this document to collect your responses, and then copy and paste them into the application form.

Organization name \*

Primary contact name \*

Primary contact email \*

Primary contact phone \*

Primary contact's role \*

Staff, board member, volunteer, etc

Organization's mission \*

Year established \*

Is your organization formally affiliated with another organization? \*

National chapter, etc.

Organization city and state \*

Organization website

Organization's annual budget \*

Number of staff \*

Please include full- and part-time staff

### **Organization Fundraising Operations**

Please answer the following questions as best as you can for the last year (either calendar year or fiscal year). This is intended to give us a baseline understanding of your current fundraising operations.

Who in your organization is currently involved in fundraising efforts? What are their roles? How much hours per week do they spend on fundraising? \*

How many fundraising mailings do you do each year? How much does each one raise? \*

How many fundraising events do you do each year? How much does each one raise? \*

Do you raise any money via email or social media? If so, how much? \*

Which of the following communication methods do you use? \*

* Printed newsletter
* Email updates/newsletter
* Annual report
* Social media
* Other

How do you track donations and donor relationships? \*

Software (eTapestry, Raiser's Edge, etc), spreadsheets, or other

Do you have a major and/or mid-level donor program? \*

Describe briefly how you connect with prospects & donors: \*

Identify prospective donors

Involve prospects and donors in your organization

Solicit them

Thank and love them

How many donors have you cultivated and solicited one-on-one in a face-to-face meeting in the last year (calendar or fiscal year)? \*

How many individual donors made gifts to your organization in the last year (calendar year or fiscal year)? \*

How many gifts of the following amounts did you receive from individual donors in the last year (calendar year or fiscal year)? \*

$5,000+

$2,500-$4,999

$1000-$2,499

$500-$999

$250-$499

$100-$249

Up to $99

Do you have a planned giving program in place? \*

Have you ever received a bequest or donation from an estate? \*

Do you have a "give or get" expectation for your board of directors? If so, what is the expectation? \*

Give is how much a board member is expected to donate themselves; get is how much a board member is expected to fundraise from others

How much was given by board members in the last year (calendar year or fiscal year)? \*

What has been the role of the board in fundraising? \*

Do you have an advisory council or similar entity? If so, do they give to the organization and how much? \*

### **How MatchDotDollars Can Help You**

Briefly describe your organization’s current fundraising goals \*

Areas of growth, fundraising goals, opportunities

Is there a particular area of fundraising that your organization needs help with? \*

Major gifts, direct mail, etc.

Briefly describe how your organization could benefit from the support of a fundraising coach \*

Describe who in your organization (staff, board member, volunteer) is prepared to dedicate time to building a fundraising program, and how many hours each person is able to dedicate to fundraising. \*