



MoneyMoneyMoney: Fundraising Resource Guide

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Dance USA Artistry Forum

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Customer Relationship Management (CRM) is a widely-implemented strategy for managing a company's interactions with customers, clients and sales prospects. It involves using technology to organize, automate, and synchronize business processes—principally sales activities, but also those for marketing, customer service, and technical support.

The overall goals are to find, attract, and win new clients, nurture and retain those the company already has, entice former clients back into the fold, and reduce the costs of marketing and client service.

Customer relationship management describes a company-wide business strategy including customer-interface departments as well as other departments.

Measuring and valuing customer relationships is critical to implementing this strategy.

Free/Low Cost, Customer Relationship Management Systems: Online and Software

- **Athena:1.0, Fractured Atlas**, Internet based
<http://athena.fracturedatlas.org/articles/2011/05/03/athena-1-0>
- **SalesForce**, Internet based
<http://www.salesforce.com>
- **Patron Technology**, Internet based
<http://www.patrontechnology.com/patronmanager>
- **QuickBooks Online**, Internet based
<http://quickbooksonline.intuit.com>
- **Raisers Edge**, Software
<http://www.blackbaud.com/products/fundraising/raisersedge.aspx>
- **Donor Tools**, Online
<http://www.donortools.com>

Popular Online Fundraising and Project Support Tools

- Freelanthropy, <http://www.freelanthropy.com>
- Giveloop, <http://giveloop.com>
- JustGive, <https://www.justgive.org>
- Kickstarter, <http://www.kickstarter.com>
- Paypal, <https://www.paypal.com>
- Superfluid, <http://www.thesuperfluid.com>

Popular Online Resources (Definitions):

Chronicle of Philanthropy (<http://philanthropy.com>)

The Chronicle of Philanthropy is the newspaper/online resource of the nonprofit world. Printed biweekly and access online, gives the latest information on the philanthropic enterprise. The Web site offers the complete contents of the latest issue, an archive of past issues and articles published since October 1997, and two issues' worth of the most recent grant listings.

Forbes (<http://www.forbes.com/>)

Forbes.com includes real-time original reporting on business, technology, investing and lifestyle; stock and mutual fund quotes; comprehensive company profiles; a wide array of interactive tools, calculators and databases, including People Tracker, the annual Forbes Lists; a Lifestyle section that currently focuses on high-end vehicles, collecting, real estate and travel; and the complete online editions of *Forbes'* magazines.

Fortune (www.fortune.com)

Part of CNNMoney.com, Fortune houses articles on technology, investing, management, international, as well as its famous lists. All of the Fortune lists (i.e. Fortune 500, Fortune Best Companies to Work For, etc.) can be found online, as well as complete online editions of *Fortune* magazine.

Foundation Directory Online (<http://fconline.fdncenter.org>)

The Foundation Directory Online provides access to two fully searchable databases. The foundation database houses a collection of data on 80,000 foundations, corporate giving programs, and grantmaking public charities. The grants database is a collection of 500,000 records of grants awarded by foundations. Both databases are searchable and are designed to give access to information on each foundation's funding interests and giving history.

Guidestar (<http://www.guidestar.org/index.html>) **Can use free**

Searchable data from IRS Forms 990 and the IRS Business Master File, including comprehensive facts on employee compensation and grant activity, annual reports, audited financial statements, letters of determination, and other documents.

Wealth Engine (www.wealthengine.com)

Database giving various information including: income and income sources, business affiliations and business profiles, stock holdings, prior giving detail, personal profiles, non-profit affiliations and profiles when available through the matched sources.

Rich Register (**printed document, every other year**)

The Rich Register provides information on over 5,300 (including Archives section) of America's richest men and women. The book is compiled through the use of public records, Securities and Exchange Commission filings, Dun and Bradstreet reports, industry and business analysts and experts, and various private sources.

<p>*Printed Sources:</p> <p>CEO Magazine Chronicle of Philanthropy Financial Week Forbes Fortune Fundraising Success IEG Source Book IEG Sponsorship Report Kiplingers Major Gifts Report New York Times Nonprofit Sector Yellow Book Pensions & Investments Poder Rich Register Robb Report Regional Social Register “Green Book” Social Register The Non-profit Times The Washington Post Time Town & Country USA Today Wall Street Journal Washington Business Journal Washington Life Washingtonian</p>	<p>*Online Resources:</p> <p>Chronicle of Philanthropy (http://philanthropy.com) Forbes (http://www.forbes.com/) Fortune (www.fortune.com) Foundation Directory (http://fconline.fdncenter.org/) Guidestar (http://www.guidestar.org) Hoovers (www.hoovers.com) IEG (http://www.sponsorship.com/) Lexis/Nexis (www.lexis.com) National Directory of Corporate Public Affairs and Washington Representatives (http://lobbyists.info/Login.aspx) New York Times (www.nytimes.com) Pensions & Investments (http://www.pionline.com/apps/pbcs.dll/frontpage) The Non-profit Times (http://www.nptimes.com/) The Washington Post (http://www.washingtonpost.com/) USA Today (http://www.usatoday.com/) Wall Street Journal (http://online.wsj.com/home/us) Washington Business Journal (http://washington.bizjournals.com/washington) Washington Life (http://www.washingtonlife.com/) Washingtonian (www.washingtonian.com) Wealth Engine (http://www.wealthengine.com/pub/)</p>
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