

Record Keeping for Fundraisers: How to not get lost in the shuffle.

Often otherwise brilliant fundraising campaigns fail because systems have not been set up to record and respond to donations and to tabulate data on fundraising strategies. It is easy to consider record keeping "shitwork" and assign it to more or less willing volunteers, who become less willing, and pass it on to other volunteers. If paid staff don't get volunteers to do all recordkeeping, they save it to do when they are too tired to do anything else. The work is tedious and monotonous, and it can seem unimportant in a crisis service.

The problem with treating record keeping as a low priority, only to be done when a mailing must go out and you need an up-to-date version of the mailing list, is that details get overlooked, peoples names are misspelled, results of appeals are not tabulated, donors are not thanked on time, renewals go out to people who have already renewed, and so on.

Unfortunately, if you don't keep clear, careful records, and don't see this as a priority, you will lose members, and your fundraising strategies will be adversely affected. Fortunately, there are simple ways to keep records and to minimize the paperwork involved.

The Mailing List

You need two separate mailing lists for all your donors—a zip code and an alphabetical list. (For those of you who have or will have a computer, you can translate the following information into a computer program. The principles are the same.) Every time a new member joins, you need to make new cards—one for the alphabetical list, and one for the zip code list.

The alphabetical list is used to record information about the donor. The zip code list is used for mailing. The zip code list can be kept in a variety of ways. Some groups use xerox labels for a zip code file. Others use Cheshire labels, which are run off by a

mail order firm. The zip code list is kept on specially designed cards, which are fed through a machine onto labels. Many groups go through an evolution in their zip code mailing list upkeep. Lists under 500 names can be kept on label sheets and updated. Lists over 500 names are hard to keep on label sheets because the additions and corrections often involve retyping whole sheets. These mailing lists are generally transferred to Cheshire cards. At about 1500 names it is cost effective to rent space on a computer. Depending on your resources, and how much you have to pay for a computer in your area, and how many uses you could see for one, after 3,000-4,000 names it becomes cost effective to buy your own computer system, and use it for your mailing lists, bookkeeping, and other data tabulation.

The best system for your mailing list will depend on the size of your list, your access to clerical volunteers or staff, your plans for expansion of your list, and the area you live in. People in cities will have more options for computer rental than people in smaller towns. People in rural areas will not have the turnover in membership that urban areas have, and will not need to make so many address corrections, which will allow them to keep a manual system much longer.

For fundraising purposes, the alphabetical list is the most important. The easiest way to keep it is on 3 x 5 or 5 x 7 cards, which are kept in a file box. Some people keep full sheets of paper on every donor, but these are harder to rifle through for quick information, and are usually too cumbersome for most membership files.

The card is very straightforward, as the diagram below shows. The same information is recorded for every donor. Leave a sample card at the beginning of your file box, and volunteers can follow the system easily.

Dear Joan

Dear Joan,

Do you have any ideas for raising money in hard times? Some of the people who come to our office walk twenty blocks to get here since they can't afford bus fare. Others come here to read the want ads in the newspaper because they don't have a quarter to get their own. When people are that desperate, how can we raise money?

Fort Wayne Fundraiser

Dear Fundraiser

You can raise money by believing that your work is important, then asking everyone to give what they can. If they have no money to give, they can give you time. Think back to high school, when nobody had money, but they could raise it for something they wanted. Use your members' energy to run a car wash, go door-to-door in more affluent parts of town, or put on a talent show.

If they *do* have some money, ask them to give more to you now because there is more need for your work. Your own members certainly know why you are needed. Ask each member to buy a second membership for a friend or co-worker; ask every person who buys your publications to buy two and give the second to their library or doctor's waiting room; ask every volunteer to sell twice as many tickets to your special events.

If they are able to give a large donation, ask for a large donation. Don't sell yourself short. Nancy Snyder, staff director of the organization 9 to 5 in Boston, had two of her major donors tell her they could not give as much this year because of "hard times." But hard times hits secretaries a lot harder than big donors. Nancy explained why it was even *more* important to have an effective organization for working women now. One donor renewed her gift of \$2,500 and the other *increased* her gift from \$2,000 to \$2,500. You can do the same thing. Know what you're worth and ask for it—you'll get it.

Dear Joan,

An organization in our town is doing similar work to ours. We do not overlap, as our client population is bigger than either of us can serve. However, we have learned that they are badmouthing us to funding sources, and since we do compete for money, we are wondering what to do?

Competing in Colorado

Dear Competitor:

As your mother used to tell you, "You should be bigger than they are." Mom was right.

Especially because there is so much competition for money, it is important to keep your eye on the ball at all times. If you let yourself or your leaders get sucked into name-calling with other groups, you will get angry but you will not get rich. So keep your fundraising team focused on work that makes money for your group.

First of all, reaffirm that your group is terrific, that it does valuable work, and that it is vital to the community. Say so often.

Second, arm your volunteers with a one-page fact sheet giving the statistics on your group's work. Use numbers. For example, "Our organization sent 500 citizens to testify before the Commerce Commission at three hearings in the county. Because of our work, the gas company's rate increase was denied, saving the average homeowner \$174 in 1982." Train your fundraisers to discuss your group's *results*, not other people's opinions.

Third, send donors clippings of good press stories and editorials. Let them know when your leaders will be on radio and TV shows. Ask for endorsements from local and national politicians and leaders in your field. Also ask these people to call your prospects before you go to ask for money so your way is paved with praise. It is all right to suggest the right thing to say, such as "doubled their membership" or "85% of their clients are out of the program and gainfully employed after the first year."

Fourth, ALWAYS compliment your competition. Then change the subject. Just say, "Gee, I've heard they do excellent work. Of course, if you have more questions about their program, you really should talk to them. Now, let me tell you about our plans for this year . . ." If you ever slip and criticize another group, it will make you look petty and it will always get back to the other group. Why waste valuable time with a donor that could be better spent praising your own group? \$

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Questions for the column should be sent to the *Grassroots Fundraising Journal* marked "Attention: Joan Flanagan." Ms. Flanagan regrets that she cannot answer each question individually.

The views expressed in this column are not necessarily the views of the publishers or other contributors to the *Grassroots Fundraising Journal*.

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NAME *This is typed or printed so that ANYONE could read it*

ADDRESS ZIP

PHONE NUMBER *Get this off of the check.*

OTHER INFORMATION *This space is for recording "Friend of May S." or "Former client." etc.*

DATE	GIFT AMOUNT	RESPONSE TO
<i>Each gift is recorded separately, i.e.</i>		
<i>4/82</i>	<i>\$15</i>	<i>Spring appeal</i>
<i>6/82</i>	<i>\$12</i>	<i>Raffle Tickets</i>
<i>9/82</i>	<i>\$25</i>	<i>Renewal</i>

Before depositing checks, be sure to notice whether you can read the name on the return envelope or form sent in with the check. Many people scribble, and their handwriting is hard to read. Getting the correct spelling from their check will insure that you don't copy their name wrong. Also, notice that checks give you information. For example, a check may come in from John Smith, but the names on the check may read: JOHN SMITH and MARY SMITH, M.D. In that case, note on their card, "Wife is a doctor." This information may be useful to you in a major gifts campaign. Lawyers, doctors and academics can often be identified from their checks. Keeping track of all donations each donor gives will allow you to target people to be invited to special events, or encouraged to pledge. Certain people will give every time they are asked, and some people will only give once a year, period. You may wish to not send the "once a year only" people your special appeals, and only send them to multiple donors. In some cases, you can use donor information to recruit volunteers. For example, people who like to buy a lot of raffle tickets are often willing and able to sell a lot. Noting them on your card file will increase your sales force.

Updating Your Mailing List

You should update your mailing list on a weekly basis, unless you have under 5 new names per week. You should never be more than 25 names behind, because the temptation to hurry and get caught up will cause you to make mistakes.

Every six months, you should count the number of zip code cards you have, and the number of alphabetical cards. Obviously, they should be the same number, but frequently, they are not. One group discovered that they had 50 more alphabetical cards than zip code cards. Somehow those cards had been dropped out. None of the

people in two zip code areas were getting their newsletter and other benefits, nor were they getting appeals. This accident was discovered when several people wrote to complain, and a conscientious volunteer counted both sets of cards. If you have more zip code cards than alphabetical cards, this may mean that some of your donors are getting two mailings, or that your record keeping system has broken down. Although it is really boring to match each alphabetical card with its zip code counterpart, if you are more than 10 cards off, you need to do it. (First, count all the cards again to make sure that you didn't just miscount.) Doing this regularly will keep this from being an overwhelming task.

As you do mailings, watch for duplications. It is easy to misfile cards, and then make a new one, or, when changing addresses, to forget to pull out the old card. However, getting duplicate mailings makes donors think you waste money.

Keep a second copy of the zip code list in a safe place away from your office. Many groups actually rent a safe deposit box for second copies of their mailing lists. In the unthinkable event that your office was vandalized, or destroyed by fire or flood, you would still have your donor list, which is your lifeblood. It is more difficult, and more expensive to keep a copy of the alphabetical list, but if you can do it, that is ideal. Replace these lists with up-to-date ones at least every six months. It may seem expensive, but the loss of the list would be incalculable.

Tracking Appeals

In order to know which appeals are most effective, you have to "track" how successful each appeal is. The simplest method for this is to keep a piece of paper near the person who takes care of the mail, and ask him/her to code each response to an appeal. The following diagram shows such a device:

APPEAL	RESPONSE				
	Week #1	Week #2	Week #3	Week #4	Month #2
Summer 400 sent 7/15/82	### ## ###	### ## ## ### ## ##	### ## ## 	### ## 	### ## ###
Pledge 300 sent 8/12/82	###	### ## ###	### ## 	### 	### ## ###

The first four weeks are the heaviest response, and by the end of two months, you have 90% of your responses

in, and can add them up and evaluate the success of the mailing.

SAMPLE EVALUATION

Appeal	Total response		Major Donors		Regular Members			
	#	\$	#	\$	#	\$		
Spring 300 sent 4/12/82	25	500	1	50	23	350		
Average Gift (excluding major donors:)		350/25	\$14					
Gifts you get most often:				\$10				
Cost of Mailing:				\$37				
Percent of response:		25/500	5%					
Dollar income versus dollar expense:		500/37	\$13.50 per \$1 spent					
<p>Evaluation: A good moneymaker. Response might have been higher if we hadn't mailed in April. We can get this list again this summer, and try it out. The appeal letter (attached) does not need to be improved as it has consistently pulled 5% or more. This is our best spring appeal yet, but a much smaller return than our fall appeal to a similar group of people.</p>								

Demographics

In order to be as exact as possible about your constituents, you need to see what kinds of people make up your donor population. Demographic data is more fun to compile than all the rest of record keeping. Every three months, count up the following:

How many of your donors are women? Men? Couples?
What is your average gift overall?

What percentage of your grassroots fundraising income comes from major gifts?

Where do your donors live? (Divide up the area you serve into counties, towns, zip codes, neighborhoods, suburbs, or whatever suits your population best.)

What do your donors do for a living?

Professionals:

Small businesspeople:

Unemployed:

How are you recruiting most of your donors?

Mail

Speaking engagements

Face to face

PSAs, etc.

(See how many donors you know this about. In small towns or rural areas, you may know most of your donors.)

Demographic data may cause you to rethink your outreach efforts and some of your fundraising strategies. For example, one rape relief group made an assumption that most of their constituents would be women. When they acquired mailing lists, they took men's names off, thinking it was a waste of postage and printing. In seeking and assigning major donor prospects, men were the bottom priority. In spite of this lack of outreach to men, when they did a demographic survey, they discovered that 25% of their donors were *men*. Their assumption that men wouldn't give was incorrect.

Information On Major Donors

Records on major donors need to be more expansive than on donors of smaller amounts. Each major donor should have one sheet in a notebook, or a separate file folder. Copies of correspondence, notes about phone calls, newspaper clippings, and so forth need to be kept with each name. The cover sheet on the donor should look something like the one on the next page. Under "other comments" you should include who knows the person, what kind of causes they give to, their age, number of children, marital status, etc. Note any piece of information that will be helpful to you in targeting them

for a bigger gift, or giving you clues as to who the donor may know who, in turn, would become a major donor.

All information on major donors is CONFIDENTIAL. The files and notebooks about them should not be accessible to staff and volunteers who do not work on the major gifts program.

MAJOR DONOR RECORD	
Name:	
Address: Home:	
Business:	
Phone: Home:	
Business:	
Occupation:	
How did this person become a major donor?	
Other comments:	
Giving Record:	
Date:	
In Response to:	
Contact:	

Thank You Notes

All gifts should be acknowledged within 48 hours of receipt. At least send a thank you within a week of receipt. For gifts under \$35, a handwritten postcard is fine. For gifts over \$35, a handwritten or typewritten note of greater length is needed. You should keep copies of your thank you notes to major donors, but it is not necessary to keep copies of other thank you notes. In order to insure that gifts have been acknowledged, simply write "ty" (for thank you) and the date on the donor card in the alphabetical list. If you have promised major donors something extra, be sure to send them a thank you note in addition to the gift. Write on their cards "ty 8/16/82" and "Book sent 8/20/82" so that you know you have both sent them a note, and the benefit to which they are entitled.

The following are sample thank you notes for small donors and major donors:

\$5 - \$35 gift

On a postcard, handwritten:

Dear Ms. Riley,

Thank you so much for your gift of \$25 to _____.

As you know, we are primarily supported by individuals, and a gift like yours is not only a great help financially, but also a terrific morale boost!

Thanks again,

On a postcard, offset:

Dear Friend,

Thank you so much for your recent donation to our work. Gifts like yours make it possible for us to expand our program and serve the hundreds of people who need us.

We will stay in touch. Feel free to call us anytime with comments or suggestions or questions.

Thanks again,

FOR MAJOR DONORS WHO YOU DON'T KNOW

Typed on organization stationary:

Gene Generous
123 Affluent Ave.
Nice Suburb, CA

Dear Mr. Generous,

I am writing to express our sincere thanks for your donation of \$100. As you know, we rely on the support of individuals for the bulk of our financial needs, and large gifts like yours are more help than we can say in meeting our budget.

Our goal for our major gifts campaign is \$5,000. With your gift, we have now reached \$3,000, and we are confident that we will be able to raise the rest.

We will be sending the book, _____ in a few days as a token of our thanks.

Again, thanks so much. Please keep in touch.

Sincerely,

FOR MAJOR DONORS YOU DO KNOW:

Typed or handwritten on organization stationary:

Dear Mary,

Your gift \$100 arrived yesterday. Many, many thanks! With your help we are now 3/5 of the way to our goal of \$5,000. Your gift rounded us off at \$3,000, and I know we will raise the rest shortly.

Thanks for all your enthusiasm and suggestions at our meeting. I'll keep in touch about our progress.

_____ our gift to major donors, is in the mail.

Take care and thanks again!

Sincerely, Or All the best—



Other Necessary Files

- All mail appeals and their accompanying inserts,
- copies of your 501(c) 3 status. Everyone should know where these are and what it stands for, as people and businesses often request this.
- copies of grant proposals
- copies of appendices such as list of the Board of Directors, the latest budget, resumes of staff, list of corporate and foundation donors, support letters, press clippings, testimonials from clients, etc.

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Earth To Board Members: Are We All Clear?

(This is the first in a series of articles that will discuss recruiting, using and motivating Board members for fundraising.)

One of the hardest tasks organizations face is getting a common agreement among Board members as to just what their responsibilities are. This is particularly evident in the area of fundraising. There are many management and organizational development techniques to help with this and related Board problems. Their success depends on the group, and on the technique.

One technique which many groups have used successfully is developing a statement of agreement for Board members. This statement serves as a job description, and clarifies Board responsibilities and authority. This kind of statement is best used by a Board that is already committed and motivated. It helps channel their motivation, and defines for all agreements which may never have been verbalized. An example of such an agreement follows. Agreements like these should be developed by Boards themselves, and not imposed by staff members or outside consultants. Different Boards will have different agreements, although the ones suggested here are generic enough to be adapted to most Board situations.

Once a Board has developed an agreement, this statement can be read at regular intervals to remind people of what they have agreed to, it can be used for internal evaluation, and it can be used in recruiting new Board members. When a prospective Board member is considering the pros and cons of a particular Board commitment, having a private conversation with a current Board member, and going through the agreement point by point can help to insure that no one comes onto the Board under any false illusions.

An agreement like this also improves relations between Board and staff. Staff know what Board limits are and will not make demands that exceed those.

This agreement is not legally binding, and a statement should be included to that effect. The statement is morally binding. It is an expression of good faith, and it provides common ground from which Board members can operate.

Sample Statement

As a Board member of _____, I understand that my duties and responsibilities include the following:

1. I am *fiscally* responsible, with the other Board members, for this organization. It is my duty to know what our budget is, and to be an active part in planning that budget, and planning the fundraising to meet that

budget.

2. I am *legally* responsible, along with the other Board members, for this organization. I am responsible to know and approve all policies and programs, and to oversee the implementation of policies and programs. I know that if I fail in my tasks, and if the organization becomes the subject of a suit from a private person, or from the Federal or state government, I may be held personally liable for the debts incurred.

3. I am *morally* responsible for the health and well being of this organization. As a member of the Board, I have pledged myself to carry out the mission of _____. I am fully committed and dedicated to this mission statement.

When a prospective Board member is considering the pros and cons of a particular Board commitment, having a private conversation with a current Board member, and going through the agreement point by point can help to insure that no one comes onto the Board under any illusions.

4. I will give for me what is a *substantial* donation. I may give this as a one time donation each year, or I may pledge to give a certain amount several times during the year.

5. I will actively engage in fundraising for this organization, in whatever ways are best suited to me. These may include individual solicitation, doing special events, writing mail appeals and the like. There is no set amount of money that I must raise because I am making a good faith agreement to do my best, and bring in as much money as I can.

6. I will attend _____ Board meetings every year, and be available for phone consultation. I understand that commitment to this Board will involve a good deal of time, and will probably not involve less than _____ hours per month.

7. I understand that no quotas have been set, that no rigid standards of measurement and achievement have been formed. Every Board member is making a statement of faith about every other Board member. We are trusting each other to carry out the above agreements to the best of our ability, each in our own way, with knowl-

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The Santa Barbara County Run For Justice

In the last decade, Americans' interest in physical fitness has increased substantially, and as a result, health and exercise related businesses have been developing in communities throughout the country. In fact, it is now almost impossible to leave one's home without encountering one or more joggers on the road. Even major corporations have begun to acknowledge their employees' interest in physical fitness by creating exercise rooms and in-door tracks in their office buildings.

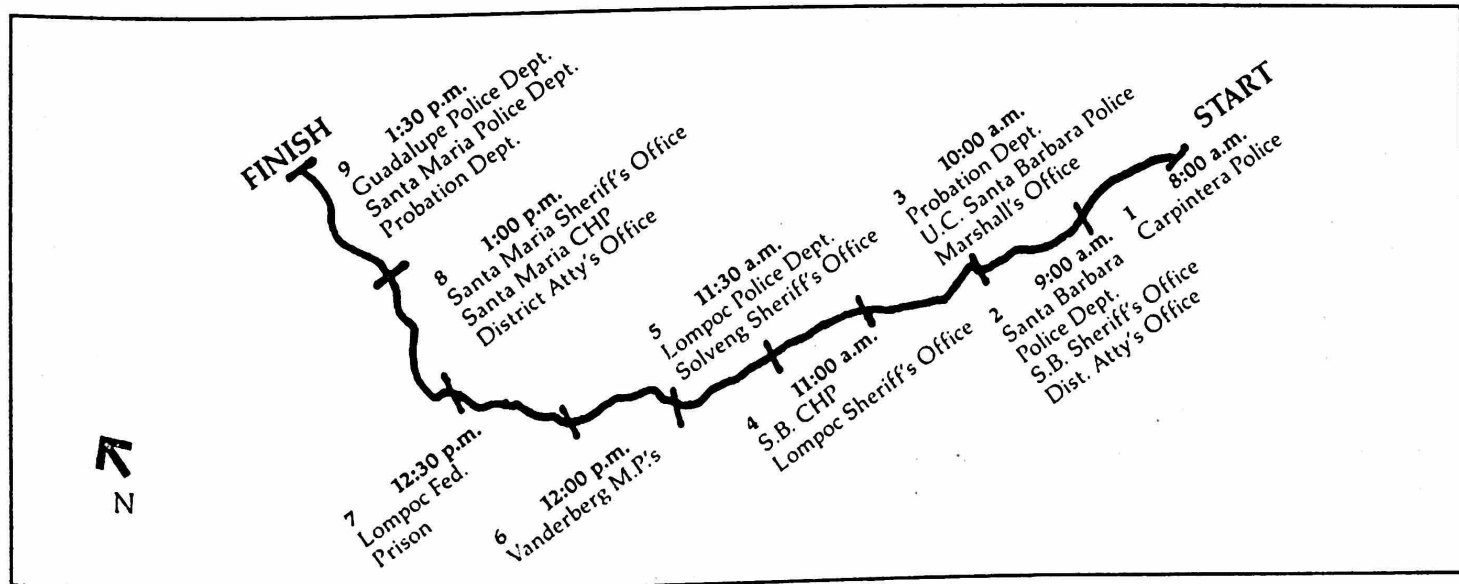
The current physical fitness fad is being taken advantage of by profit-making and non-profit corporations alike. Jane Fonda has developed one of the most unique and lucrative businesses to benefit a non-profit cause via the fitness fad. Called "Workout," this business began as an exercise program that catered to working women. Located in buildings close to many people's jobs, "Workout" established schedules and fees that accommodated the needs of many women. The Workout Program became so popular that a book was published describing the routines, and shortly after that, a record was released to be used by individuals when they "worked out."

"Workout" is an extreme example of how fitness can be used to benefit a non-profit organization. Less extreme, but not less creative examples include walkathons and marathons that have been organized by numerous community groups. The following article describes such an event—a run that was organized by the Family Violence Coordinating Council of Santa Barbara County to raise much needed funds for battered women's shelters.

The *Run for Justice* was not just a standard marathon

run. It was a run whose course traversed the entirety of Santa Barbara County and a distance of 90 miles. And, not just anybody could run in this event. The *Run for Justice* participants were all representatives of local law enforcement agencies: police officers, sheriff's deputies, probation offices, deputy district attorneys and the like. The *Run for Justice*, in the words of its organizers, was "a cooperation in action." Shelters for battered women and law enforcement agencies worked together for the first time to raise money to put an end to domestic violence. Here is how it was done.

Sometime back in 1981, the Family Violence Coordinating Council of Santa Barbara decided to see if they could take advantage of local police and other law enforcement officers' inherent interest in running to raise money for the county's shelters for battered women. Rather than develop a run that consisted of one short route for everyone to run together, they developed a 90 mile route that was divided into nine 10-mile segments. The run was, in effect, a relay that went from one end of the county to the other. Each 10 mile section went through a different community in the county, and the law enforcement agencies in each community were asked to send runners for that 10 mile segment only. The agency could decide how many runners to send, and the agency could stagger the runners along its portion of the course, or have them run the entire 10 miles. The map below shows how the county was divided, which agencies were assigned to which segments of the run, and the starting times for each section.



The law enforcement agencies were then presented with a challenge. They were asked to see how much in sponsorship dollars they could line up either for their individual runners or for their agency's participation in the run. Their goal was to raise \$100 per mile or about \$1,000 per ten mile segment.

The organizers of the run suggested a few ways that each agency might meet their goal. If there were five runners from an agency, each of these runners could sign up 10 sponsors who would agree to contribute \$2.00 for every mile run. If all five runners completed the 10 miles, the agency would have raised \$1,000. Or, the agency could pick one super athlete to represent them, running the entire 10 miles alone. The rest of the agency would then have to hustle 100 sponsors from the community at \$1.00 per mile. Or, as the organizers put it, "Joe, who owns the local Bar & Squid Factory, doesn't believe that

*Shelters for battered women and
law enforcement agencies worked together
for the first time to raise money to put
an end of domestic violence.*

Officer Claude could run to the corner, so he agrees to sponsor Claude for \$100/mile (and takes \$1,000 tax deduction!) Claude's fellow officers tend to agree with Joe, so they drag Claude from start to finish."

The suggestions worked and \$9,000 was raised. (\$8,000 after expenses.) The sponsorships came from individuals and community businesses alike, and ranged from 50 cents per mile to a flat \$500 contribution to sponsor the participation of one agency. One agency, the Solvang Police Department, brought in a total of \$1600 in sponsorship money. Another agency got so involved in trying to get sponsors that they sent out a mailing to all of the community businesses.

The success of this event was the result of a lot of hard work, and the following are a few of the elements that contributed to that success.

First, law enforcement agencies in most communities will not necessarily jump at the opportunity to help raise money for shelters for battered women. However, if the event has the endorsement of one prestigious agency, say the county Sheriff's Office, the other agencies might be more likely to see it as something worth their involvement. In Santa Barbara, the *Run for Justice* happened to be scheduled just before the local sheriff's elections. That made it easier for the Family Violence Coordinating Council to obtain the endorsement and co-sponsorship of the Sheriff's Office of Santa Barbara County.

Second, the coordinators developed a sense of compe-

tion. Which agency could raise the most sponsorship dollars to benefit shelters for battered women? An awards barbeque was planned for the end of the run. The agency that attracted the most sponsorship dollars received a trophy with its name engraved on it. The trophy stayed with the winning agency until the following year's run. The runner who completed the most miles also won a trophy. In addition, commemorative awards were given to each participating agency, and *Run for Justice* T-shirts were given to each runner. The t-shirts, awards and the barbeque were all instrumental in encouraging the agencies' and the individuals' involvement.

Finally, the event was organized very carefully. After the Sheriff's Department agreed to endorse the event, the organizers started lining up the participating agencies. Once an agency had agreed to participate, a coordinator was identified within the agency, who signed up the runners and coordinated the recruitment of sponsors. The agency then received a packet of information including a fact sheet about the event, an information sheet about the shelters and how the money that was raised would be used (stressing the fact that all contributions were tax deductible), a map of the entire run, a

SPONSOR INFORMATION SHEET

Please print clearly and complete all requested information. Sponsors need to know that their contributions are tax deductible. Shelter Services for Women, Inc. will collect pledges by mail during the week following the event. Return completed sponsor sheets to your agency coordinator by April 21.

Runner _____ Pledge _____ /
Dollars per mile

Agency _____ No. miles _____

Sponsor _____ Phone (work) _____

Address _____ Phone (home) _____

Street

City

Zip

Runner _____ Pledge _____ /
Dollars per mile

Agency _____ No. miles _____

Sponsor _____ Phone (work) _____

Address _____ Phone (home) _____

Street

City

Zip

Runner: _____ Pledge _____ /
Dollars per mile

Agency _____ No. miles _____

Sponsor: _____ Phone (work): _____

Address: _____ Phone (home) _____

Street

City

Zip

close-up of the section of the map where that agency would run, starting times, an invitation and RSVP forms for the awards barbeque, statements of the \$1,000 goal for each segment and suggestions for how to meet that goal, an introduction to the "check-in" people who would be monitoring the run, and several sponsor sheets. (See illustration one for sample sponsor sheet.)

Volunteers were recruited from the shelters to monitor the run. Each 10 mile section had two people and one car assigned to lay out mileage markers, follow the runners in case of accidents, carry first aid kits, and record the number of miles each runner ran. (See illustration two for description of the shelter workers' job.)

SHELTER WORKERS JOB DESCRIPTION

We need: 2 people at starting point
1 follow car
bandaids and water
5 mileage markers for each starting point
shelter phone number
pen and paper
map of the ten mile stretch
name(s) of runner(s) and number of miles each is expected to run

Expect ten miles to be run in one-two hours.

1. Drive 10 mile route and place mileage markers at 2,4,5,6, 8 mile points;
2. Be at the starting point for your assigned 10 mile stretch 15 minutes before scheduled start;
3. Follow cars should locate runners every 1/2 hr. and offer assistance if necessary; follow cars should have water and bandaids; follow car for the first 10 mile stretch (Capinteria to Santa Barbara) should have a sign reading, "CAUTION: RUNNERS AHEAD" posted on the rear of the car. When following runners put on emergency flashers. Follow runners long enough to ask them if they are okay, except of Ortega Hill Rd. Follow runners from beginning to end of Ortega Hill Rd.
4. If there are problems, call the Santa Barbara Shelter (if the problem occurs in south county) or the Lompoc Shelter (if the problem occurs in north county). The coordinators will be calling the shelters periodically.
5. Follow cars can transport runners back to their starting points if they need transportation.
6. Except for the first and last 10 mile stretch, each starting point will be an end point for another runner or group of runners. When the runner(s) complete the stretch, record the name(s) of the runner(s), the name(s) of the agency/agencies they represent, and the number of miles each one has run. Phone in the completed information to the shelter closest to your position.

Additional volunteers were recruited to compile and distribute information packets to the participating agencies, to help with publicity, to organize the awards barbeque and to do the follow-up to gather the sponsor money and send out thank yous.

The event, because of its unique concept, attracted a tremendous amount of media attention. Press releases and radio and TV spots were sent out in advance. Flyers announcing the event were posted throughout the county. The flyers encouraged anyone who read them to pick a law enforcement agency in their community and offer to sponsor one of their runners.

The entire event took 3 months to organize. The following outline indicates what took place during those three months.

Week of March 8	Develop and duplicate information packets Marathon route Sponsor info sheet and sign up Runner info sheet and sign up Shelter info sheet Collection (of money) info Barbeque R.S.V.P., awards announcement
March 12	Deliver packets to police agencies
March 15	Recruit volunteers for check-in points
March 15 - April 25	Develop publicity campaign: Copy for newsletters, newspapers, radio and TV spots Get endorsements
March 8 - April 24	Organize barbeque: Site location Donations/purchase of food and refreshments Entertainment Awards: Trophies and t-shirts MC Organize car-pools to barbeque
April 24	Day of event: Kick-off T.V. interviews Check-in points Carpool/transportation Preparation of food/refreshments Set-up for entertainment Barbeque: Food Service Awards Announcement of goal Speech about shelters and police cooperation Entertainment Clean-up
April 25 - May 10	Follow-up Collection of sponsor donations Press release Thank you's to donors and runners Record sponsors: sponsor lists, mailing lists Documentation of event for future use.

The Run for Justice did more than raise money for the shelters for battered women in Santa Barbara County. It provided the law enforcement agencies and the shelters with an opportunity to work together. Shelter workers and criminal justice workers had the opportunity to get to know each other in an informal setting and develop relationships that no doubt will be useful in the coming years. And, perhaps most important, the event was an extremely effective tool for raising the awareness of people throughout Santa Barbara County of the need for shelter services for battered women.

Fundraising Events Part Four

Starting At Home

Perhaps one of the most common fundraising idioms is "the more personal your approach, the more successful you will be." This idiom applies to mail appeals, major gifts soliciting, and even to fundraising events. While it is true that events are, by nature, a less personal method of fundraising, there are ways to apply the personal approach and put on some quite lucrative fundraisers. It all starts at home.

Using your or one of your supporters' homes in which to throw a fundraising event has many benefits. Homes usually require little additional decorating. They are comfortable, have chairs already there for people to sit in, and tables on which to set food and literature. Homes are conducive to a variety of kinds of events, including cocktail parties, wine and cheese parties, luncheons, dinners, and even coffee and cake gatherings in the afternoon. Budgeting for all of these kinds of events is fairly simple because there are relatively few costs. (The basic budget items include design and printing of the invitation, postage, food, drinks, flowers, decor, and possibly entertainment.) Unlike other kinds of events, the costs can be easily controlled, and because the costs are never that high, you never stand to lose very much. And most important, homes are rent free!

The following article responds to some of the most common questions that organizations ask about events in homes. The first five questions deal with the basic factors that attract people to house events: the house, the sponsors, the entertainment, the food and the cause. The last two questions deal with two other basics: how do you raise money, and who do you invite?

1. *What kind of house should we use?*

People are always curious to see other people's homes. The best kind of home to use for an event is one that belongs to some well known individual in your community or one that has a reputation for being particularly beautiful, unique in its design or furnished with special furniture or art. However, not every organization has access to these kinds of homes. If that is the case, don't let that stop you from putting on an event in a home. Simply look to other means of attracting a crowd.

Whether the house you use belongs to a celebrity or is unique or not, there are some factors to keep in mind in

choosing a house. Not every house is a good house for events. The house must be big enough to hold the number of people you are trying to attract. There must be sufficient parking. It should be located in an easily accessible part of town, unless it is a home that is so well known or owned by such a well known individual that people will travel out of their way to get to it. Finally, if you intend to have anyone speak or make a presentation, it must not only be able to hold the number of people you think will attend, but also have an area where that number of people can easily see and hear the speaker.

2. *Should we have a sponsor list?*

Sponsorship of house parties, while not absolutely essential, is definitely helpful in attracting a larger crowd. A party in a home inevitably has the sponsorship of at least one individual — the person whose home it is. If the house is owned by some relatively influential person in the community, or if you are only trying to attract a very small and very select group of people, that may be all you need. If this is not the case, however, it would be advisable to have additional sponsors.

There are two kinds of sponsors for an event: the passive and the active sponsors. The passive sponsors are those who allow their names to be used on invitations but will provide no other assistance in promoting the event. The passive sponsor often will not even attend the event. There are some people whose names alone will give your event credibility and therefore are useful as passive sponsors. However, you must make sure that passive sponsors make up only a small portion of your sponsor list.

The active sponsors are the key to successful house events. These are the individuals who lend their names, provide you with lists of individuals to invite, offer to send out invitations to their friends with special notes encouraging them to attend, and make it a point to attend the event themselves. Events in homes can have as few as one sponsor and as many as a hundred.

3. *Should we provide entertainment or a special speaker?*

The judgement of whether or not you need entertainment and what kind greatly depends on your own community. When considering whether or not to pro-

vide entertainment, think about and weigh all of the various incentives for people to attend the event. For example, if you are trying to attract a medium size crowd (30 - 50 people), are using the home of a relatively well known individual, and your issue is one that has a great sense of urgency, you may not need any special entertainment. However, if your organization is sponsoring a lot of public events, or there are a lot of events similar to yours taking place in your community, or you are using an unknown home and only have one sponsor, you must do something to make your event stand out as special. A well known speaker who people do not often get the opportunity to hear, could provide the needed incentive for many people to attend.

**Come to an evening
a la Russe . . .
Reliving the last days of Imperial Russia
Celebrating the first days of the
Coalition for the Medical Rights of Women
moving their mailing list onto a
COMPUTER**

This evening of
bourgeois decadence in honor of
Socialist Revolution and Women's Health
will feature the unsurpassed

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A menu highlighted by:

- Caviar with Creme Fraiche
- Hot Forschmak
- Herring in Mustard
- Kulebyaka with Sour Cream
- Pickled Mushrooms
- Smoked Goose
- Miniature Dessert Tarts

- Flavored Vodkas
- Russian tea and coffee

AND OTHER DIVINE DELIGHTS

Russian Music and Russian Folktales
will round out this evening of superb sociability

**Your donation of \$25 per person,
\$40 for two people,
will make this move so much easier.**

TIME: 5 p.m.

PLACE: 3903 - 19th St., San Francisco

DATE: Sunday, March 28, 1982

**Your hostesses: The Countess Kimenka Kleinovitch
The Czarina Nanushka Adesski**

R.S.V.P. By March 23, 1982

You may phone to hold your reservation, 431-7456, or send your check in the enclosed reply envelope. Please consider a donation even if you can't come. All donations are tax deductible.

Make checks payable to: CMRW

100% of your donation will go to CMRW. Food and drink are being donated

Live music can also contribute to making an event unique. Keep in mind however, that few homes are built in a way that is conducive to live concerts. It is for this reason that the best kind of musical entertainment is that which is appropriate as background for conversation.

In general, entertainment, in the form of speakers or

musicians must be chosen carefully. Before you think about spending money on entertainment, make sure that the fundraising potential of your event will justify that expenditure. If you are thinking of providing music, in many cases records or tapes will suffice. Remember, also, that people generally have short attention spans. If you plan a program that requires the audience's undivided attention, make it short.

Regardless of whether you have "outside" musicians or speakers as featured attractions, it is important to provide some focus for the event to remind people that they are there for a cause, and to give them some new information to take away with them. This could be provided by a member of the Board of Directors or the Executive Director or anyone who is a clear speaker and can impart a sense of enthusiasm and necessity for the cause being benefitted. This kind of talk lays the groundwork for a fundraising pitch.

4. How important is the food?

Food can easily be made the main attraction of your event, and if used creatively, can be all you need to provide by way of entertainment. The following are a few ideas of how to use food in this way:

- Rather than throw a large cocktail party, ask your host or hostess to sponsor a dinner party at their home. Choose hosts who pride themselves in their gourmet cooking, and have them invite six couples for \$50 per couple to dine at their home on behalf of your cause. In most cities it is hard to find a gourmet meal for that price. Have the hosts donate the food as their contribution, so that you raise \$300 with very little effort.
- Have a dinner or cocktail party with a theme. One organization in San Francisco had a supporter who threw a Russian evening at her home, complete with flavored vodkas, and raised enough money for the organization to put their mailing list onto a computer.
- Have a well known restaurant in your community cater the event.

Food and drinks can make or break your event. Even if the food is not the central attraction, it must be thought about carefully. Food, whether it be good cheese and bread, unusual hors d'oeuvres, or dry chicken and tasteless vegetables, will always be remembered. Be sure to be clear on your invitation what kind of food will be provided, particularly if the event is scheduled at a time when either hors d'oeuvres or dinner would be appropriate.

5. If the cause is important enough, won't people come to the event because of that?

Unfortunately, the most common mistake made by those producing fundraising events is to think that the issue or cause is of great enough interest that a crowd will turn out simply because the event is on behalf of that issue or cause. This is not to say that the cause will not ever draw people; it just usually takes more than that

alone to attract a crowd to an event where you want to raise money. This is why so much attention must be paid to the house, the sponsors, the food and the entertainment.

There are a few circumstances under which the cause will be sufficient to draw a crowd, the most obvious of which is when something has occurred that provides the cause with a sense of immediacy or urgency. The sense of urgency must be unprecedented, and it can only rarely really be used to promote events. If a series of events take place six months apart, and each one is related to a crisis or urgent development, the audience will soon stop paying attention to the notices for the events. People can really only tolerate a certain amount of crisis.

6. How much money can I raise?

Events in homes can be quite lucrative. Events in homes in New York and Los Angeles, have raised as much as \$50,000. Events in San Francisco tend to raise no more than \$20,000, and usually raise between \$1,000 and \$5,000. In smaller communities, house events raise closer to \$500 - \$1,000.

There are a couple of ways to raise money at a party in a home. The two major methods are charging admission either at the door or by selling tickets in advance and eliciting contributions through a fundraising "pitch" at the event itself.

Setting the cost of a ticket can be difficult. The most useful way to determine a ticket price is to survey the market. Collect invitations from other groups or talk to sponsors of other events in your community to find out what they charged for similar events and what kind of success they had. Think about the kind of audience you are trying to attract, and make sure that you set a price that is affordable to the greatest number of that group. Ticket prices can be as little as \$5 and as much as \$100 per person. Some organizations choose to charge nothing to get into the event. This is usually because they are trying to attract a very wealthy group of people and want to make sure that the contributions are not limited to the price of the ticket. The philosophy is that it is better to hit them for a large contribution once, at the event, rather than having them pay to get in and then be asked to give again.

The fundraising "pitch" which is when someone actually stands up and asks for money, is perhaps the most difficult part of a fundraising event and there are very few people who do this effectively. An entire article could and will be written on the art of making an effective fundraising pitch. In thinking about having a pitch made, you must consider the following questions. How specific a pitch do you want made? Do you want your audience to hear about the issues you are working on, told of your need for contributions, and shown where they can put their checks on their way out? Or, do you want people to be asked to write out checks right then and there, while the pitch is going on? Some organizations ask directly for contributions of specific amounts, and plant someone in the audience who will volunteer a gift on the condition

that someone else in the room matches it.

The key is to know your audience. Don't try to ask for large contributions if it is obvious that no one in the room can afford them.

Whatever method you use, be sure to have a place for people to hand in their contributions, and be sure to tell people how their contributions will be used. Also be sure that whoever is doing the pitch is comfortable doing so. Very few people are comfortable talking about or being talked to about money. If the person you have asking for contributions is ill at ease, the audience will pick that up, and very few contributions will come forward. The person making the pitch must make it seem so natural and logical to pull out a check book and write out a check, that people actually feel awkward *not* doing so.

7. Who should I invite?

Perhaps the most vital element of a successful fundraising event is a "hot" invitation list. A "hot" list is one that has been carefully compiled to include people who have previously expressed an interest in the cause being benefitted, have a history of giving money to similar causes, have a history of attending fundraising events, and who have a personal connection to someone involved in the event. The ideal way to compile this kind of list is to ask each sponsor or supporter of the event to provide a list of people they think would be interested in the issues being addressed. If you don't have any sponsors, ask previous supporters of the cause to provide lists. Be sure to ask the person whose home you are using to compile a list as well.

Each person who compiles a list should be asked to star the names of those people who, because of their giving capability, are worthy of special attention. Anyone who compiles a list should also be asked to send out invitations with personal notes to those on their list. Not everyone will be willing to do this, but there are some individuals who will, and the impact of that personal note should never be underestimated. Anyone who is willing to send out personal notes should be provided with invitations in stamped envelopes. It is helpful to provide blank cards with the invitations on which personal notes can be written.

The value of follow-up to the invitations should also never be underestimated. Anyone whose name is mentioned as worthy of attention should get it. If the person who gave you the name won't follow-up with a phone call, someone from your organization should.

A final note: The success of fundraising events should never be judged solely by the amount of money raised at the event. Even if someone attends the event but does not contribute at that time, there is a good chance that with the proper attention, that individual will contribute later. Because of the personal nature of events in homes, representatives of organizations have wonderful opportunities to actually meet the donors, get to know them a little, and begin to develop a more personal relationship that can be invaluable in future fundraising.

\$

—LH

Record Keeping Continued . . .

Things You Don't Need To Keep

One of the first rules of recordkeeping is that it is as important to know what to throw away as what to keep. Every six months, set aside a day to go through your files and throw away as much as you can. You will be amazed at how UNimportant IMPORTANT documents have become, and you will astound yourself by your propensity to collect non-essentials. You will also probably discover many useful pieces of information which you had forgotten you had.

You don't need to keep:

- Mailing lists that are more than three months old. They are too far out of date to warrant using.
- More than two copies of any appeal, flier or any other dated materials that you are keeping just for reference.
- Copies of resumes of staff who don't work for your group anymore.
- Old lists of Board members, or information on people who don't live in your town anymore, and who are not donors.
- Annual reports from foundations or corporations that are more than two years old.
- To-do lists that are more than a week old.
- Used membership forms, coupons, or return envelopes after the information from them has been recorded.
- Rejection letters from foundations. Simply keep a list of foundations you applied to, and a brief description of why they rejected you.
- Information on fundraising that is more than 3 years old, unless the information is still being used by your group.

Don't hesitate to throw out books, magazines, newspapers, clippings, letters, pamphlets, advertisements, gimmicks, etc. Generally, if you haven't looked at something for six months, chances are you don't need it.

Final Tips

Your filing system should be clear enough that someone could come in, and within two hours of looking around your desk and filing cabinet, be able to know where things are and what your recordkeeping systems are. Simple things will make this possible. Clearly mark all your files. Label your sheets of paper, boxes, file card holders, notebooks, etc. Keep your files in alphabetical order, or some order that makes sense to someone other than just you.

\$
—KK

Next issue, a look at research files — how and what kinds of research to do, how to retrieve information, and when you have done enough research.

Back Issues of Grassroots Fundraising Journal Available

Many readers have inquired about getting back issues of the Grassroots Fundraising Journal. Limited quantities of three of the Journals are available for \$2 each from the Grassroots Fundraising Journal, P.O. Box 14754, San Francisco, CA 94114. The articles in each issue are as follows:

Volume One, Number Two (April 1982)
Fundraising Events for Non-Profits (Part One): Overview. Making Self-Sufficiency a Reality in a Rural Organization: The Lisbon Area Community Organization Recreation Center

Volume One, Number Three (June, 1982)
The Lord Loveth a Cheerful Giver: How to Set UP a Pledge Program. Fundraising Events (Part Two): Finding a Performer

Volume One, Number Four (August, 1982)
The August Doldrums. Twenty Words That Sell. Fundraising Events (Part Three): Budgeting

Volume One, Number Five (October, 1982)
Fundraising in Rural Areas. Advisory Boards: No Miracle Solution. Why Most Benefit Concerts Fail. In the Spirit: Fundraising During the Holidays

Plus, all the issues include a profile of a major donor, book reviews, success stories, and invaluable advice from our special columnist, Joan Flanagan.

Earth to Board Continued . . .

edge, approval and support of all. I know that if I fail to act in good faith, I must resign, or someone from the Board may ask me to resign.

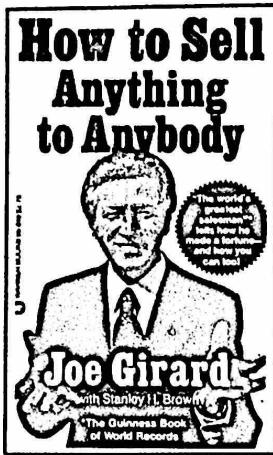
In its turn, _____ is responsible to me in a number of ways:

1. I will be sent, without request, quarterly financial reports which allow me to meet the prudent person section of the law.
2. I can call on the paid staff to discuss program and policy, goals and objectives.
3. Board members and staff will respond in a straightforward and thorough fashion to any questions I have which I feel are necessary to carry out my fiscal, legal or moral responsibilities to this organization.

(If appropriate, a description of the officers of the Board and their particular responsibilities can follow.) Each Board member signs the agreement, and a copy of the signed agreement is given to all board members as a part of their Board packet.

\$ — KK

Book Review



How to Sell Anything to Anybody

by Joe Girard

Published by Warner Books, 228 pages, 1977

\$2.75 Available in all bookstores

This book review steps outside of traditional fundraising and organizing literature to describe a book that can help your fundraising in different ways than literature written specifically for non-profits. This is a book about selling techniques. Because in many ways fundraising is selling, it is important for good fundraisers to read books about successful salespeople and their methods from time to time.

The author of this book holds the *Guinness Book of World Records* title for selling the most cars and trucks in a single year in the history of sales. At the time he wrote the book, he had held that title for four years. He is popularly referred to as the 'world's greatest salesman' and in fact, now makes much of his living teaching others how to be effective salespeople. Joe Girard is a rags to riches person. The story of his life follows the format of the I-made-it-you-can-too self-made success routine. He was born of very poor Sicilian parents, was thrown out of high school, fired from over forty jobs, lasted only ninety days in the U.S. army, and finally at the age of 35, turned his life around when he became a car salesman.

The first part of the book, and a theme throughout the book is about how attitude is the key factor in success or failure. His lectures on attitude, developing winning attitudes, and his examples from his own life, are interesting and sometimes inspiring.

But what is more valuable about this book is the information on the specific how-tos of selling. Girard describes in detail all the systems he uses for selling. From the beginning there is a strong emphasis on being ethical in your business dealings. He wants his customers not only to buy from him, but to keep buying from him everytime they need a car, and to recommend him to their friends. In order for that to happen, his sales rap must be honest.

This is a book of interest to fundraisers because one of the most helpful fundraising planning devices available

is to imagine that your organization's services are products, and that your donors are customers. If you were a salesperson, how would you sell these products to your customers? The non-profit world rarely thinks in these terms, and in fact is often suspicious of thinking in these terms. However, such thought can make us better fundraisers.

The book will also help you to break out of the NEED mentality: the idea that people give us money because we NEED it. A few people do, but most people give money because they get something from the organization, and from the act of giving. For example, people rarely buy their groceries in a certain store simply to support that store—they buy them because the price is right, the store is convenient, they like the quality of the groceries, etc. People buy from a non-profit for many of the same reasons: they want the newsletter, they want the organization to succeed because it will improve their lives directly or indirectly, and it makes them feel good to give away money.

This book describes many different methods for presenting your product so that a prospect will want it, and will become a customer. Girard discusses how to qualify prospects, and various approaches to cold, warm and hot prospects.

Getting prospects to become donors is one part of fundraising. What is sometimes harder is keeping them year after year. Girard spends a good deal of his book talking about different methods he has used to keep his customers coming back, such as effective use of mail appeals (he sends a card of a different color and shape every month of the year to his customers) and effective use of business cards and other selling literature. Anytime a person in the greater Detroit area happens to need a car, Girard wants that person to think of him. Therefore, he has to get his name in front of prospects as frequently, and in as positive a way, as possible. This is certainly our task in fundraising.

The exact methods Girard uses are not appropriate in a non-profit. Girard is flashy and aggressive. He always wears polka dot shirts, his business card has his picture on it (and he leaves it wherever he can—he estimates that he distributes 500 cards a week), and the most important difference is that he is selling a specific and expensive product. While he does not lie about his product, he does use some tricks in order to get prospects. For example, he pays people \$25 for every prospect they send him who becomes a customer. In 1977, he paid out \$14,000 that way. What is valuable to fundraisers is the way he developed these habits, the thought process behind them, and his evaluation of his success. It is important to develop habits that will more effectively promote our organizations, and expand our donor base.

Finally, this book is fun to read. If you want a break from work related reading, but still want to improve yourself, read this book. At the very least it will make you wiser about buying a car.

\$

—KK

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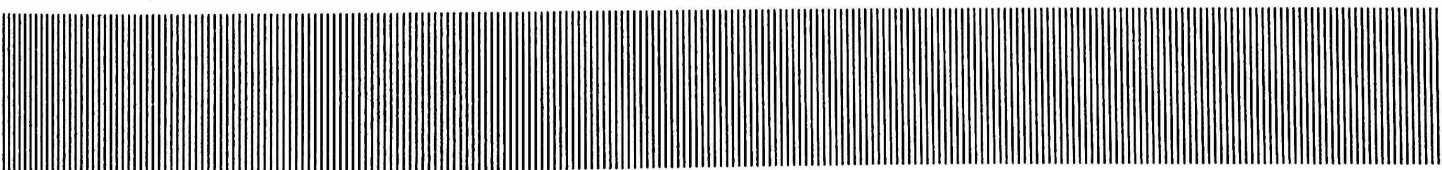
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The Grassroots Fundraising Journal is now accepting display and classified advertising.

Classified: \$.50 a word, minimum 10 words

Display: 1/8 page, 3 1/2 inches wide x 2 1/4 \$ 25

1/4 page, 3 1/2 inches wide x 4 1/4 \$ 50

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Whole page, 8 inches x 10 1/2 \$200

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