

## Grammar For Grantseekers

**T**HE OLD SAYING, "Don't judge a book by its cover," may apply to the selection of a good book, but not the world of fundraising proposals. Donors, foundation staff, and corporate philanthropy executives are bombarded with far more requests for funds than they can ever handle. For most philanthropists, therefore, the process of selecting which proposals or appeals to read takes place on many levels. This process is not usually based on the proposal's cover, as the introduction to this article might suggest. However, it can be based on other seemingly superficial criteria such as the writing style, format, neatness, and clarity of the presentation.

This article is dedicated to a discussion of style. While effective writing and presentation styles are not the only requirements for your organization to receive contributions, their absence may cost you some.

Our first recommendation to any fundraiser is to purchase *The Elements of Style*, by William Strunk and E.B. White. This small book covers the basics of style directly and briefly and is a valuable reference for any writer. Much of the following writing advice is borrowed from Strunk and White.

**Be Brief.** One of the basic rules of *The Elements of Style* is "Omit needless words." Most fundraisers should pin this saying to their bulletin boards, for it reveals a common and critical failure — lack of brevity. Given the large number of funding requests being submitted, short ones are more likely to get read first. A fundraising letter should be no longer than two pages and a proposal no longer than 10 pages. Condensing your material into fewer pages may seem difficult at first. It will force you to evaluate each section and, within each section, each paragraph for relevance and effectiveness. There is

great benefit to this process. In the end, condensation of your fundraising materials will probably make them much more effective.

**Leave out extra words.** The rule of brevity should be applied to every sentence in your fundraising appeal. Write short, concise sentences. Leave out unnecessary words.

**Be positive.** Focus on what your organization is doing, not on what it is not doing.

**Be specific.** People considering giving money are not overly interested in the generalities of the problem your organization is trying to address. They are more interested in the specifics. They are looking for answers to the following questions:

- what are your goals?
- how do you intend to achieve them?
- what exactly are you doing?
- where are you doing it?
- how much does it cost?

The more words it takes you to get to the answers, to these questions the more opportunities there will be for your reader to lose interest.

**Proofread.** Writers are often terrible proofreaders, and fundraisers are often terrible typists. It is not necessarily reasonable for a donor to reject a funding appeal because it contains typographical errors, but it has been done. Get someone to proofread your materials before they are printed or sent out, and correct the typos. If a page has so many corrections that it looks messy, take the time to have it re-typed.

**Personalize your appeals.** Donors like to feel that some special attention is being paid to them. Frequently, letters are sent out with a typed "Dear" and a filled-in name, or a blank is left so that the amount

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## Dear Joan



Dear Joan, Help! I need an idea to get cash fast. When I agreed to be the fundraiser for my daughter's Little League team, I never thought they would win. Now we need a bus to go to the State tournament in two weeks. What can I do?

Proud but Panicked

Dear Proud:

If we need the bus, we can all do the fundraising. Take a lesson from your daughter: teamwork is the key to success. Ask all of the parents of the team to ask for money. Now that your team is representing the entire town, you can use the publicity and appeal to the citizens' civic pride.

To get money quickly, ask the people who have the most money. Ask local merchants and successful professionals to underwrite the team's trip to the State contest. Begin with the merchants who sponsored Little League teams this year, then branch out to other businesses and professionals who make money from the Little League age group such as department stores, fast food restaurants, and pediatricians. Find out who took out the largest advertisements in the high school year book and ask them too.

Organize the parents into teams of two and give each pair a list of good prospects. Each pair of adults should take their Little Leaguers, in uniform, along on the call. Tell each prospect their business or service will be listed in the program for the awards banquet. Set the prices as:

\$25 — Pinch hitter

\$50 — Clean-up hitter

\$100 — Free agent

Emphasize that the team is representing the whole town, especially for the banks or any business with the name of the town in the name of the business. Keep smiling and try to get the check the same day. Otherwise

explain the deadline and offer to return for the check in two days.

This should bring in enough money to send the team all the way to the *National* finals if they surprise you and win the State contest, too. If not, use the balance of the money for nice trophies for the kids, handsome plaques for all the people who give you donations, and a great party for the fundraisers.

Dear Joan, My organization is ten years old. Every year we raise and spend all of our budget. We've been told we should start an endowment and ask people to write us into their wills. Is it too soon for this? How can I ask someone to include my group in his will? I can't figure out how to bring it up without seeming like a ghoul, so I don't ask. How long can I put it off?  
Afraid in Arkansas

Dear Afraid:

Do it now! If you don't, your organization is missing out on a major, and growing, source of money. In 1982, Americans left \$5.5 billion to charities in bequests; this was 9.2% of all philanthropic dollars. Money from wills was almost *double* the amount of money from foundations, which was only \$2.7 billion, or 5% of the total philanthropic dollars in 1982. If you have learned how to write proposals and raise money from foundations, you can certainly learn how to ask for bequests.

The arithmetic works out like this: The average American makes donations to eleven charities a year, the average American also remembers between two and five charities in his or her will. So of the eleven groups that have counted someone as "our donor" in their annual fundraising campaigns, two to five also get in the donor's will, and the rest lose out. Do you want to get in the will, or be left out?

Most of the money left to charities goes to churches, universities, hospitals, and disease associations. Why? Because those organizations hire somebody who *asks* people for bequests and other sorts of planned gifts. Call the largest university or hospital in your area and ask to speak to the Director of Planned Giving. Ask him or her to suggest the best current books and workshops on setting up a planned giving program. Then work with your lawyer, accountant, and banker to set up a planned giving program for your organization. You already have a corps of people who give you money every year. Now learn how those same people can give you much larger gifts through their wills.

Joan Flanagan is the author of the new *Grass Roots Fundraising Book* (1982) and *The Successful Volunteer Organization* (1981), both from Contemporary Books and available through your bookstore.

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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being requested can be filled in differently for each donor. These "fill-ins" are messy and can decrease the effectiveness of your appeals.

Making your funding appeals personal is costly and not always cost-effective. For example, if you are sending out 500 appeals for contributions of \$25 or more, you will not want to personalize each letter. However, if you can identify some donors among those 500 names who can give \$100 or more, you may want to pull those names out and send them a personal appeal.

If you are sending the same funding proposal to several funding sources, you need not retype it for each one. Write a personal cover letter.

**Pay attention to grammar.** Perhaps it is because social change organizations consider their work to be on the cutting edge of all kinds of change that they take so many liberties with the English language. Some of these liberties can produce negative reactions among potential donors. Therefore, it is important for fundraisers to pay attention to their use of the English language.

Punctuation, use of consistent tense, and placement of adjectives and adverbs are elements of grammar that evade many individuals who write fundraising appeals. Those who know grammar, however, often find improper use of it very distracting. If it is *your* donor who is distracted, you may lose a substantial contribution. If you are not confident about your writing skills, either find a way to improve them, or find an editor.

**Avoid elaborate words.** The simpler the language you use, the clearer your request will be. Never assume that your reader understands the technical jargon of the field in which you work. If you are not sure that your appeal can be understood by a layperson, try it out on a friend.

**Don't turn nouns into verbs.** One of the more offensive abuses of the English language is the way in which nouns have been turned into verbs. There are no such words, for example, as *impacting*, *dialoguing*, and *processing*. One has an impact and engages in a dialogue or a process. This transformation of the language has taken such place to such a degree that it is often difficult to

### ATTENTION ARTISTS:

DES Action National is sponsoring  
a poster design contest for  
DES AWARENESS WEEK 1984.

The contest winner will receive a  
contract to produce camera-ready copy.

We are seeking tight comps by Oct. 1,  
1983. For more information write:  
DES Action National, 1638 B Haight St.,  
S.F. CA 94117

tell which words are invented words. If you are not sure, be conservative.

**Spell correctly.** Misspelled words, like grammatical errors, are distracting.

**Use lists.** Writing a fundraising appeal requires presenting a large amount of information in as few words as possible. Lists are a good way to eliminate superfluous prose. Be on the look-out for instances in which a list is the most effective way to present your information.

**Avoid redundancy.** Repetition is the most frequent cause of lengthy funding appeals. It often reflects lack of clarity. Fundraisers are asked to present their organi-

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zation's goals in Section 1 and its objectives in Section 2. Not knowing the difference, the writer simply says the same thing twice, using different words. If you suspect your material is repetitious, get a second opinion. If you don't know the difference between goals and objectives, check the dictionary.

### Some commonly misused or inappropriately used words and phrases

**Effect/Affect:** Effect can be used as a noun or a verb. As a noun it means *result*; as a verb it means *to bring about* or *to accomplish*. Affect means *to influence*.

**Irregardless:** This is not a word, regardless of how often you have heard it. The *less* of regardless provides all the negative you need.

**Interesting:** this vague word is simply overused.

**We feel:** a saying that should never appear in a fundraising pitch. The reader does not care about your emotions.

**As to whether:** the "as to" can always be omitted.

**Grant:** a frequently misused word. One does not "write a grant." One writes a proposal, or a request for a grant, or a grant proposal.

**The reason why is that/owing to the fact that:** both of these are wordy ways of saying "because."

**There is no doubt that:** "doubtless" or "no doubt" says it more efficiently.

**It is a situation in which:** six words that can usually be omitted entirely.

# Federated Fundraising

## THE ISSUES

The following article is a profile of one of the nation's alternative funds which uses a payroll deduction as their main strategy for soliciting donations.

Asking for money through payroll deductions has proven to be one of the most efficient and effective methods of raising money. The pioneer agency for this type of fundraising is the United Way, which now has affiliates in almost every town with more than 25,000 people in the United States. In 1980, a total of \$1.3 billion was pledged through payroll deduction plans. More than 90% of this money went to the United Way, with the remainder going to Combined Health Agency Drives (CHAD), United Arts Funds, Black United Funds, and other service and alternative funds.

As of 1981, there were eleven affiliates of the National Black United Fund, eight combined health appeals, seven united arts funds, seven coalitions of alternative organizations, and two women's funds successfully soliciting money through payroll deductions. (Source: *The Grassroots Fundraising Book* by Joan Flanagan.)

A payroll deduction plan is simply a pledge system administered in a specific way. Employees of a corporation or business specify how much money they want to give per month, and the employer deducts this amount from their wages before each month's paycheck. Once each quarter, the employer sends all this deducted money to the collecting agency—usually called a federation. The federation then distributes the money to its members.

Setting up a payroll deduction system is simple in theory. All the groups who want to participate form a federation. The federation acts as an umbrella for

these member groups and others who may apply, soliciting donations from employees (with the employer's permission), distributing the money, and deducting the administrative expenses from the funds solicited.

Unfortunately, as with many simple ideas, there are complications in practice.

First, the federation has to decide who is a member, how many members they want, and how groups can apply for membership. They have to decide how the money will be distributed. Will it be given out evenly, or according to the need of the member agency, or according to the wishes of the donor, or a combination of these?

Second, the federation has to gain access to the workplace. For years, the United Way has had a virtual monopoly on employee contributions, and some employers are reluctant to let other groups participate. The United Way itself is reluctant to lose this monopoly. (Interestingly, studies have shown that employees give more money when they can choose from more than one federation, and in some cases, United Way contributions have gone up with this competition, rather than down as one might expect.)

Third, because a great deal of money is involved, and because the politics of the charities receiving the money are not always agreeable either to the United Way or the employer involved, groups may find themselves in legal battles to protect their right to free speech in soliciting employees. Some federations, for example, have sought to exclude advocacy groups or legal defense funds from their ranks.

Finally, the time and expense involved is often much more than would seem reasonable at first. The accompanying chart shows what might be expected in a generic federated drive. Obviously, real numbers would vary from group to group.

In spite of these difficulties, federated fundraising is an important strategy, and we are pleased to present this case study on one federated fundraising campaign. -KK

**Growth of a New Federated Fund**

	Organizing Year	Year 1	Year 2	Year 3	Year 4
Workplaces Participating	0	3	7	16	25
Employees Solicited	0	10,000	25,000	50,000	80,000
Employees Contributing	0	700	2,500	6,000	10,400
Percent of Employees Contributing	0	7%	10%	12%	13%
Average Contribution	0	\$25	\$25	\$25	\$25
Total Contributions	0	\$17,500	\$62,500	\$150,000	\$260,000
Percent Administrative Fee	0	12%	12%	11%	10%
Administrative Income	0	\$ 2,100	\$ 7,500	\$ 16,500	\$ 26,000
Net Contributions Distributed to Organizations	0	\$15,400	\$55,000	\$133,500	\$234,000
Campaign Expenses	\$18,000	\$19,000	\$25,200	\$27,200	\$ 29,200
Deficit to be Raised					
from Foundation Grants, Individual Contributions, and Member Organization Dues	\$18,000	\$16,900	\$17,700	\$ 10,700	\$ 3,200

Source: *Grassroots Fundraising Book*; Flanagan)

## A Case Study in Federated Fundraising: Aid to Wisconsin Organizations

OVER THE LAST FIVE YEARS, non-profit organizations have had to re-examine their financial picture in order to continue to serve their clientele or meet their organizational goals. Beginning in the late 70's, government funding and foundation contributions started to shrink, leaving non-profit organizations to develop new fundraising strategies. One of the most successful ways to raise funds is through workplace solicitation. United Ways of America are an example that giving at the workplace through payroll deductions is an easy and efficient way to get individual contributions to charitable organizations. Not only are gifts larger through payroll deductions, but people become regular contributors, giving each year.

United Ways of America have paved the way for payroll deduction giving, but they do not raise funds for or allocate them to all existing non-profit agencies that serve a community. Thus, other funding coalitions have formed to help collectively raise funds for other non-profit agencies. Some are federations of non-profit organizations and others are alternative funds controlled by individual philanthropists. Both are agencies that are committed to opening access to workplace solicitation so that employees can have a real choice for their charitable gift-giving. Aid to Wisconsin Organizations is such an organization.

### Who Are We?

Aid to Wisconsin Organizations (AWO) is a non-profit umbrella agency providing technical and financial assistance to social welfare and social change organizations in South Central Wisconsin. Located in Madison, Wisconsin, AWO does cooperative fundraising for thirteen member agencies. Our membership is multi-focused: from offering information on consumer protection to providing free late night transportation for women, from monitoring enforcement of animal welfare laws to improving our natural and urban environment, and providing homes for handicapped individuals to offering listener-sponsored commercial-free radio programs. A Board of Directors formed of member agencies and community representatives govern AWO. Each agency receives funds through AWO based upon money raised through public employees charitable campaigns. The funds distributed to each member agency represent a portion of the fundraising budget.

Our member agencies receive from these charitable campaigns either designated monies to the charity or undesignated monies which are given to the umbrella agency. AWO allocates all designated monies to the specified charity and equally divides the undesignated monies among its membership. For example, in 1982, each

agency received a designated amount from the charitable campaigns *plus* \$3,183 from the undesignated monies. Some member agencies, like the Dane County Humane Society, receive a substantial amount of designated monies (\$15,000) while others receive as little as \$1,500.

AWO's goal is to increase giving of undesignated funds so that it is beneficial for each agency to actively participate in AWO. Thus, AWO's Board of Directors developed a five year fundraising plan which reflects increased giving of undesignated funds. Our admission process is tied to meeting our fundraising goals. The number of participating members will expand as we raise substantially more funds to allocate. Beginning in 1984, AWO will allocate small grants to non-member agencies as part of our commitment to community agencies involved in social welfare and social change.

### How AWO Started

AWO was created in 1979 when five Dane County social welfare and social change agencies identified their need for an organization that could raise funds collectively and increase community awareness of each group's unique services. AWO members proceeded to develop a strategy for carrying out the dual purposes of increasing community awareness and generating stable financial support for their work. Traditionally, these five organizations relied on government and foundation funding. The organizations decided to go to the original source of all gift-giving, not the government or foundations, but the individual donor, in order to raise money in an organized fashion.

When AWO incorporated as a tax-exempt charitable non-profit corporation, the State of Wisconsin already had a yearly charitable payroll deduction campaign. After a formal application and eligibility hearing process, AWO was admitted to the State of Wisconsin Employees Charitable Campaign (SECC). It is a combined campaign organized by the State employees. Currently, AWO is one of five umbrella organizations to which state and university employees in Dane County can give through the SECC. Since 1979, contributions from the state employees have increased from \$17,000 (for five member groups) to \$66,712 (from twelve groups) in 1982.

Volunteers from participating agencies staffed AWO until 1981 when AWO received a small grant from the National Committee for Responsible Philanthropy to hire a part-time person. As AWO has grown, all expenses are covered through a two-tiered combination of equal membership fees and administrative assessment fees.

### Opening Up Workplace Access

One of AWO's missions is to open up additional local employees payroll deduction campaigns to a wider var-

iety of umbrella groups in order to give employees a choice for their charitable gift-giving. AWO has been successful in opening up access in the public sector. Over the last two years, three local public sector employers have changed their methods of conducting their annual charitable campaigns to a combined campaign with equal representation by all participating umbrella groups.

In 1981, AWO obtained a ruling that allowed the Madison Metropolitan School District payroll check-off to be expanded to include a greater number of organizations. In 1982, AWO worked with two other local umbrella agencies to gain access into the City of Madison and the County of Dane charitable campaigns. AWO now participates as an umbrella agency in four public sector employees charitable campaigns. Four of our member agencies also participate in the Combined Federal Campaign (CFC) in Dane County. AWO has worked on the federal level to change the CFC eligibility rules, but the federal government has yet to make a determination on who they will admit to the CFC.

Opening up access to local employees payroll deduction campaigns has not been an easy task. However, AWO first focused its attention on the public sector because the Madison area had a high concentration of public sector employees, over 35,000, of which the State of Wisconsin accounts for 26,000 employees. The State legislature set the precedent for workplace solicitation among public employees, creating a statute which authorized employees "to designate payroll deductions for charitable purposes by the Department of Administration and the governor." The Department of Administration has administrative rules which ensure that "only

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approved charitable organizations are permitted to be designated for payroll deductions by state employees" and that "the funds contributed...are used for the announced purposes of the charitable organizations." The rules state the type of requirements which all umbrella organizations must meet to be eligible, the application procedure, the way that the eligibility decisions are made, and the way that payroll deductions are distributed.

Charitable organizations which are members of an eligible umbrella organization qualify for the State's payroll deductions if they are: a 501(c)(3) organization, exempted from federal income tax, supported in part by voluntary contributions from the public, and registered with the Department of Regulation and Licensing. The

rules allow for any umbrella organization to apply for admission to the State Employees Combined Campaign (SECC). Annually, the SECC eligibility committee reviews and recommends to the Department of Administration Secretary which umbrella organizations and their member agencies should be admitted to the SECC. The SECC sends the collected funds to an umbrella organization designated by all the umbrella organizations as their fiscal agent who distributes the funds bi-monthly. (The SECC's fiscal agent is the local Combined Health Appeal agency.)

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State employees organize and run the SECC with input from the participating umbrella organizations. All umbrella organizations are represented equally in publicity materials for the campaign, including the pledge card, the slide-tape presentation, and other literature or meetings and presentations regarding the campaign. Only one pledge card is passed out to State employees, giving them the opportunity to give to any or all of the five umbrellas and any or all of the eighty-four currently-approved agencies. Contributions which are given to the campaign as a whole (undesigned) are divided according to the percentage of designations which each umbrella group receives. Costs for campaign expenses are shared by the participating umbrellas in proportion to each umbrella's receipts through the campaign. For example, if an umbrella receives 10% of the receipts, they pay 10% of the expenses. All campaign receipts are placed in an interest-bearing bank account until distribution to the umbrella agencies occurs.

AWO has used the State's rules as guidelines for persuading other local officials to create combined campaigns among public employees. These officials, by resolution, changed their previous rules concerning payroll deduction gift-giving. AWO has progressed in the public sector because the State's campaign demonstrates that a combined campaign is an efficient way for employees to contribute to the charity of their choice. AWO also has the federal court on its side because it ruled that it is unconstitutional for public employers to arbitrarily exclude any charitable organization from access to employee payroll deduction gifts.

The United Way of Dane County was not supportive of opening up combined campaigns among public employees. They lobbied against changing the rules regarding the City and County campaign structure. They wanted the City and the County to accept a "Donor Option" plan which would allow an employee to give to any charity even if it was not a United Way agency. The

United Way would then distribute the designated money to that charity. However, the United Way never fully explained how it would distribute the money nor how they would publicize the "Donor Option" plan. The United Way also presented this plan to the Administrative Committee of the State Employees Charitable Campaign which unanimously opposed it. Thus, the State provided another example for local officials to support a combined campaign that is fair and equal to all eligible organizations.

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Although AWO has been successful in opening up access in the public sector, it has not gained access in the private sector. There is much resistance to allowing greater participation by a wider variety of social service and social change organizations on the part of the United Way of Dane County and the business and community leaders who work for the United Way. However, AWO will continue to work to expand into the private sector. Hopefully, the United Way of Dane County will join forces with the other local umbrellas to increase giving to all charities, not just to one. The public sector employees were not pleased with the means by which the United Way tried to stop opening up access. This was reflected in the amount given to the United Way in 1982 and by the fact that the Madison Metropolitan School District

allowed another umbrella agency (the local Combined Health Appeal agency) to replace the United Way as the campaign's fiscal agent. The City of Madison also selected the local Combined Health Appeal agency as its fiscal agent.

AWO is aware that opening up access to the private sector will take time. However, AWO needs to increase community awareness about AWO and its member organizations. Some of our agencies are extremely well-known and others are not. In 1982, AWO received substantial publicity because it gained access into two campaigns. In 1982, AWO is trying to increase its publicity so that more public employees will give to us and that more community residents who are not public employees will become aware of us. Once people know of AWO, then it will be easier to gain access into the private sector.

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#### *How You Can Gain Access*

If you are considering gaining access to workplace solicitation, you must examine several factors about your own community and about your organization.

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### FUND-RAISING HELP FOR YOUR COMMUNITY

The 1980s is a watershed era for many nonprofit groups as they try to cope with shrinking public funds and intense competition for private money. To help groups meet this fundraising challenge, the National Trust for Historic Preservation's Neighborhood Conservation program has published *Quest for Funds: An Insider's Guide to Corporate and Foundation Funding*. "Any nonprofit executive or board member who is starting to look for funds from private philanthropy should keep this under a convenient pillow," says Melinda Marble, The San Francisco Foundation.

Written by Joe Breitenicher, an insider with 18 years experience as both a grantseeker and as an executive director of a foundation, this 20-page special issue of the Trust's *Conserve Neighborhoods* newsletter is designed to help groups assess their fundraising needs and develop a realistic plan for raising funds.

Groups will also find out how to locate the right donor for their projects — and just as important — how to market their proposals.

As important, this special report takes the reader behind the scenes to show what foundations and corporate-giving programs look for in a proposal and how they make decisions. Valuable tips are provided by executives from major foundations.

Organizations, looking for fresh ideas on raising money — or simply feeling lost in this era of austerity — will find *Quest for Funds* to be an ideal resource. Individual copies are \$1.50 each (plus \$1.00 for shipping and handling).

To obtain your copy, write *Conserve Neighborhoods*, National Trust for Historic Preservation, Drawer 409, 1785 Massachusetts Avenue, N.W., Washington, D.C. 20036.

First, you must know the employment demographics: number of employers, number of employees, type of employment—white collar versus blue collar, private sector versus public sector. Second, you must know whether or not there is a United Way in your community and how it is received. You must also discover if other non-profit alternative funds exist and assess your current relationship with the local United Way and these alternative funds. Third, you need to consider if you have the time, money and energy to start a campaign. Fourth, you need to be a non-profit, tax-exempt organization which is eligible to solicit funds.

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Each community has its own employment climate. AWO started with the public sector because it was the largest employer in Madison and it had a process to which any qualifying organization could apply for admission. If you are considering forming an alternative fund, you have to research whether or not to start with the largest or smallest company. You need to know what companies may be sympathetic to the causes you represent (be it for a coalition of women's organizations or of environmental groups). You should know whether or not the company has the means to deduct and collect employees' contributions. If there is large public sector employment in your community, you need to research the existing laws regarding employees charitable campaigns. Some state and local laws *only* allow the United Way to solicit. Based upon a federal court ruling, you can challenge the laws.

If a United Way exists in your community, you may want to apply for admission. If they reject you, you should find out if it offers a donor option plan. This program allows for employees to designate contributions to the charity of their choice even if they are not a member of the United Way. The administration of this program has not been well-implemented and it is a means to limit the number of alternative funds in a community. The most successful donor option plan is in Philadelphia where the local alternative funds publicized the plan and used it to their advantage. However, in many communities, the United Way has not developed a clear implementation process for distributing funds to non-member agencies.

If there is another alternative fund in your community, you may be able to participate as a member. However, it may just provide you with information on how to set

up an alternative fund. In Madison, there are six umbrella organizations that collectively raise funds for non-profit agencies.

Time, money and energy are all required to form an alternative fund. Time is needed to research what exists, to make contacts, to organize the funding coalition, to decide what the purpose of the organization is, and to apply for admission to a payroll deduction campaign. Many campaigns are not combined as in Madison. You need a means to collect and distribute funds. You will need staff in the long run, beyond a volunteer board composed of staff members of the participating members.

Distribution of funds causes lengthy discussions. United Way allocated the funds, designated and undesignated, based on need. AWO distributes all designated funds to the member agencies and divides equally the undesignated funds. Each organization has to decide its own method of allocations. The philosophy of the alternative funds may assist in determining the method.

You need time to make contacts with employers, employees, labor officials, public officials, and business and community leaders. If an employer denies you access, you may be able to organize local employees to petition the employer to allow you to participate in the payroll check-off.

If you decide to become an alternative fund, you need to be a non-profit tax-exempt organization. In Wisconsin, you have to be registered with the State's Department of Regulation and Licensing to collect funds. AWO not only raises funds. It provides training for non-profit agencies and sponsors workshops on non-profit management and organizations. If you become an alternative fund, you should not just become a funding organization; you should have at least a dual purpose.

-Nicole Gotthelf 

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If you are interested in further information regarding workplace solicitation, you should read the following articles: "From the Workplace: the Payroll Check-Off Plan" by Steve Paprocki in *Community Jobs* (February 1981) and "Workplace Solicitation" in *Funding News* (March 1982). Also you can contact the National Committee for Responsive Philanthropy, 810 18th St., N.W., Washington, D.C. 20006, (202) 247-5340.

Aid to Wisconsin Organizations' participating members include: Center for Public Representation, ARC House, Dane County Humane Society, Operation Fresh Start, WORT FM-Radio, Women's Transit Authority, Madison Community Access Center, New Concepts for the Handicapped Foundation, The Wisconsin Council on Human Concerns, Wisconsin's Environmental Decade Fund, Wisconsin Women's Education Fund, Citizens for a Better Environment, and CUB Public Interest Fund. AWO is located at 520 University Ave., Madison, WI 53703. For further information about AWO, contact Nicole Gotthelf, Administrator, at (608) 251-4008.

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## Asking Current Donors for Extra Gifts: Why, How & How Often

**I**N THE CONSTANT SEARCH FOR better ways to recruit new donors to organizations, the possibilities for additional fundraising from current donors is often overlooked. Organizations' Boards and volunteers act as though their current donors are precious and fragile, and like Grandmother's good china, should only be brought out on special occasions. Consequently, most organizations appeal to their donors once a year, or twice a year at the very most.

Years of fundraising experience, however, have shown that donors respond well and generously when asked for extra gifts. Many large organizations appeal to their donors between eight and twelve times a year.

Social change organizations that have implemented this "multiple appeal" approach have discovered that they can earn enough from their current donors to make it possible to scale down their new donor recruitment efforts. The response to an appeal to current donors is rarely less than 12%. Contrast this with the 1-7% response typical of mailing to new prospects.

What does sending *multiple appeals* mean? Simply, it means sending between four and twelve different fundraising appeals to your current donors in the course of one year. We will discuss each of these in more detail, but sample appeals could include a renewal (a must), a year-end appeal, a special project appeal, and so forth.

Multiple appeals are successful for any number of reasons. First, a person's cash flow can vary a great deal from month to month. In one month, a person may receive an appeal from a group s/he supports, and would like to give, but just spent a lot of money repairing her/his car, so throws the appeal away. If the organization were to ask again in two months, when the person may have more money available, it might get a donation.

Second, some people respond to some types of appeals more readily than to others. Sending only one or two appeals a year does not allow for the variety of choices donors want. Organizations often discover that donors who regularly give \$15 a year will give \$50, \$100 or more when an appeal for a special project is sent to them. People who respond to specific project appeals are often called "bricks and mortar" people. They "buy" things for an organization: media spots, food for someone for a week, a job training program, a new building.

We rarely know why people don't respond to appeals. Despite this lack of knowledge, many people are willing to make the assumption that the donor doesn't want to give, when any of the following might be just as true:

a) the donor has been on vacation and mail has piled up, so s/he throws away anything that is not a bill or a personal letter, and your appeal gets tossed with the rest.

b) The donor is having personal problems and cannot think of anything else right now, even though s/he might be quite committed to your group.

c) The appeal is lost in the mail. This happens less frequently than we are led to believe; nevertheless, it does happen.

d) The donor loses the appeal. S/he meant to give, and put the appeal aside, and it got thrown away or lost before it could be acted on.

Donors do not feel "dunned to death" by multiple appeals. On the contrary, they get a sense that a lot is happening in the organization. Their loyalty is developed when they know that their continuing donations are also needed. Most important, they have an opportunity to express their own interests when a particular appeal matches their concerns.

Small, low-budget organizations usually find that sending between three and five appeals a year allows for the maximum contributions from donors with the minimum effort. (If you have access to an inexpensive mailing house, or if you have a lot of volunteers to send out mailings, you can send more in a year. Chances are, however, that the money for the mailing house and the volunteers' time could be better spent elsewhere.)

Once an organization has accepted the idea of doing multiple appeals, they often wonder what they are going to say in each different appeal. The following list of 26 ideas should help you choose some approaches that will work for your organization. Some of these appeals are taken from or modelled on specific groups' letters. Some of the appeals will be better suited to one organization than another, but almost any organization should be able to find one or two ideas that they could modify and use for their group.

### Seasonal Appeals

1) End-of-summer: "Please help us get a head start on our fall fundraising. As you know, fall is the time that most non-profits do most of their fundraising. For us, it is also a time of intense organizing and advocacy activities. This fall we anticipate... If we have the funds ready, we can get right to work. Will you help?"

2) End-of-year: "As you close your books for this year, please remember \_\_\_\_\_ Organization. This is your last chance to make a tax-deductible donation to our organization and count it for this year's taxes."

3) Beginning-of-year: (Written as a testimonial) "One of my New Year's resolutions was to give more money this year to \_\_\_\_\_ Organization. I realized that, like many of my resolutions, this one could fade if I did not act now. So I sent an extra \$25 on January 5. I imagine

that many of our members made a similar resolution. Perhaps you did. If you are like me, time may pass without action. So, join me, and send that extra donation now."

4) Spring appeal for new members: "Everything grows in the spring. Everything seems to put on a new look—new leaves, new flowers. . . . Our organization is growing too. You have been a big part of our growth and we thank you for that.

"This year, we want 500 new members—people like you. So, instead of asking you for an additional contribu-

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**O**rganizations'  
Boards and volunteers act as  
though their current donors  
are precious and fragile,  
and like Grandmother's good china,  
should only be brought out on  
special occasions.

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tion, we would like you to send us the names of five people you think would be interested in our organization. We will send them a letter with an opportunity to join."

### *Holiday Appeals*

5) Martin Luther King's Birthday: "Since Martin Luther King was born, the situation for Blacks and Third World people has greatly improved in America. It is no secret that Dr. King was instrumental in much of that progress. We at \_\_\_\_\_ Organization live and work by the principles of Dr. King and other civil rights leaders who gave their lives.

"Help us celebrate Dr. King's birthday with a tribute gift to our organization in Dr. King's memory."

6) Lincoln's Birthday: "President Lincoln was only one of the more famous people to be killed with a handgun. I know you want to end this senseless outrage. An extra donation from you, sent today, will give us the extra funds we need to work on \_\_\_\_\_ special program against handguns/crime in the street to strengthen our community organization activities/to escort people who are alone across campus."

7) Valentine's Day: "Do you often think of important people on Valentine's Day? Do you remember them with flowers, candy or cards? I know I do. This year, I thought of other important people in my life—the people at \_\_\_\_\_ Organization. They really depend on us, their members, for the financial support they need. Will you join me in sending an extra donation? You can send flowers or candy as well. Simply use the enclosed card."

8) Month of April: "Taxes. That's what's on everyone's

mind right now. How to pay them. How much you owe. And, where the tax money is going. That's the real rub. So much of it is wasted. At \_\_\_\_\_, we work to curb waste in government/stop using tax money for weapons/close tax loopholes for the rich. When you give money to the government, you don't know where it goes. This year, send us a donation equivalent to 10% of what you owe the government, or what you will get back as a refund. Think of it as an investment in better government, in a fairer system of taxation."

9) Memorial Day: "By remembering \_\_\_\_\_ Organization with a memorial gift, you carry on the commitment of loved ones. We will send a special card to the family of the person in whose memory the money is given."

10) June 14: "Flag Day. Most of us don't put our flags out anymore on Flag Day. In fact, a lot of people go through Flag Day without even realizing it. When we were kids, we were taught that the flag was a symbol of a lot of things we could be proud of. Democracy, Freedom of Speech, Freedom of Thought. We at \_\_\_\_\_ would like those principles to be true for all people today. We know you would too because you have supported our work over the past several years. The principles the flag is supposed to stand for can be true—with your help."

11) July 4: "We are inviting all our members to a special July 4 barbecue. Suggested donation: \$10 a person. All you can eat, games and fun. Children are welcome. If you can't come, come in spirit by sending \$10 anyway."

12) Mother's Day/Father's Day: "These are times to remember our parents, and to celebrate ourselves as parents. For many people they are fun times, surrounded by loving family members.

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**M**any  
large organizations appeal to  
their donors between eight and  
twelve times a year.

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"But what happens when this family dream turns sour—as it does for more than 50% of married women who suffer from battering, or the millions of children cruelly abused or sexually assaulted by parents? Mother's Day/Father's Day becomes a cruel irony. Celebrate Mother's Day/Father's Day in a different way this year: enclose an extra donation to \_\_\_\_\_."

13) Labor Day: "A time to take the day off. But what about all the people who want work — the 10% of the population that is unemployed? For them, Labor Day is another reminder of their joblessness. Our organization is providing training to thousands of people so that they can get good jobs in areas needing workers. Remember the unemployed this Labor Day, with a gift to \_\_\_\_\_."

14) Columbus Day: "Columbus discovered America. This is one part of American history almost everyone

knows. The problem is that this is only a half-truth: Columbus discovered America *for white people*. There were already people here — our people. We are Americans. Yet our history since Columbus has been one of genocide, displacements and oppression. At Native American \_\_\_\_\_, we are determined to reclaim Columbus Day. You have helped us in the past. Will you help us, on this holiday, to continue our vital work?"

15) Thanksgiving Day: "We would like to make Thanksgiving Day a little brighter for hundreds of people in our city who cannot afford to buy food. With your donation of \$14.50 we will provide a family with a turkey and all the trimmings. Give whatever you can."

16) Christmas/Hannukah/end of year: "We are just \$400 short of our goal to buy a new furnace for our runaway house/send our staffperson to the state capitol to lobby for the bill we have been working so hard on/distribute thousands of leaflets telling seniors how to get their homes insulated for free. Can you help us meet our goal with a special end of year donation?"

## Organizations

*often discover that donors who regularly give \$15 a year will give \$50, \$100 or more when an appeal for a special project is sent to them.*

### Old Stand-Bys

17) Anniversary: Our organization is now entering its third/fifth/fiftieth anniversary of service to the community. Celebrate with us by sending one dollar/ten dollars/100 dollars for each year of our existence. For your gift we will be pleased to send you a special anniversary parchment, suitable for framing. In addition, for those donating \$1,000 or more, there will be a special reception honoring Famous Person, who has been so helpful to our cause."

18) Pledge: "Did you ever wish you could give more? You would like to be a major donor, but can't afford it? Now you can. By joining our Monthly Donor Club, you can give \$5, \$15, \$50 or whatever you wish on a monthly basis. We will send you convenient reminder envelopes."

19) Famous Person: "I'm \_\_\_\_\_. You may have seen me on television. In my personal life, I am very concerned about birth control/tenants rights/public education. I believe the \_\_\_\_\_ Organization defends our rights in this area. Please join me in supporting \_\_\_\_\_."

(Famous Person can be truly famous, such as Robert Redford or Katherine Hepburn, or it can be someone well-known only in your community, and widely respected there.)

20) Another member: "My name is \_\_\_\_\_. I have been a member of \_\_\_\_\_ for five years. In that time, I have witnessed the continuing erosion of our rights, and the

seemingly malicious efforts of our leaders to take what little we have left. All that stands between them and us is \_\_\_\_\_ Organization. In the past five years, our organization has succeeded in \_\_\_\_\_, \_\_\_\_\_. That's why I am giving a little extra this year. \$15 is not a lot, but it really helps, and if everyone gave just \$5, \$10, or \$15 it would really add up. Will you join me?"

21) The story that might have been sad, but ended happily because of your group: "Ruthie is ten. She ran away from her violent stepfather when she was eight. She was referred to our school by a policeman who found her walking in a daze down the streets of New York City — alone, scared, penniless. Today she is lively, popular and a good student. She would like to be an attorney, and then a judge. At our school, this dream is very possible. Help us continue to help children like Ruthie. There are almost \_\_\_\_\_ million children in need. Your extra gift of \$15, \$25 or \$50 can help us expand our efforts to find them and help them."

22) Urgent need: "We have an urgent need to raise \$2,000 to alert the public of the hazards of chemical dumping currently being proposed for the east side of town. This little-known bill, which has the support of our supervisors, will bring unwarranted health hazards to over 1000 people. The Town Council is trying to slide this bill through without our knowledge, and thus our protest. Help us stop this outrage now, with an extra donation of \$15, \$25 or whatever you can send."

23) Specific project: "Our day care center is in need of new toys for the children. In order to provide quality day care, we need proper equipment. The enclosed sheet tells you how your donation could help."

Enclosed sheet:

One teddy bear: \$4; One swing set: \$100;


One personal computer: \$1500.

### Combination Appeals

24) Monthly donor to a specific project: "Please join our Food for Thought Donor Club. For \$10 a month minimum donation, you will help us to keep serving 1000 meals daily at our Parish Hall. In return we will be pleased to send you our special newsletter, *Food For Thought*." This newsletter describes our work, and provides essays and information on hunger in America and what could be done to stop it."

25) Request for funds and new members in honor of an anniversary: "It is our second anniversary. To celebrate, and to ensure that we will always be here, we are forming a 2x4 Club. Send us any combination of money, as long as it has 2's in it—\$2, \$22, \$222, \$22.22, and send us the names of four people who you think will be interested in joining. To thank you, we have had a special anniversary pin designed by one of our members. It is a 2x4, in a shape that will surprise and delight you. Join today."

26) Any of the above appeals, with a premium: "If you send your special gift before \_\_\_\_\_ date, we will send you free an autographed copy of *A Great Book* by A. Famous Person."

-KK 

## Profile of a Major Donor

**T**HE DONOR PROFILED for this issue lives in a hot desert town in a Southwestern state. She has lived in this town for forty years, having come there with her parents as a teenager. She has one overriding interest—to help create and improve the fine and performing arts in her community. Although not directly involved in social change, as our other donors have been, this donor sees her commitment as having deep social significance, as this article will show.

This donor is outside the traditional realm of giving. She did not know what a direct mail appeal was, nor could she remember ever being asked for a donation. Yet, she gives away a total of more than \$25,000 a year to three charities: a private orchestra for teenagers, an historical society museum, and a repertory theatre.

As a professional sculptor, this woman makes about \$55,000 a year from her art. In addition, she inherited \$250,000 when her father died in 1960. She invested her inheritance in property which has since been developed into condominiums and apartments. Her income from these residences is more than \$10,000 a year. With some other investments, her total gross income has usually exceeded \$75,000 annually for the past 15 years.

This donor is single, with no children. She lives very simply in a three-room house, with her art studio attached. Her house sits on five undeveloped acres. She drives a 1974 Ford, when she drives, but most of the time she uses her rather battered three-speed bicycle to get around town.

She taught art in the local high school for about ten years until she got tired of the attitude that art education was superfluous and unnecessary—an attitude held by some colleagues and many administrators. She explains, "The principal, in particular, had an attitude that art and music were frivolous, suited mostly to misfits unable to cope with the real world. Science and math were what counted in education. For him, a well-rounded young person was a white male with straight A's in biology, algebra and trigonometry, who was able to play at least two sports."

She left teaching in 1970. At first she simply worked to develop her reputation as an artist, and became involved as a volunteer in the town's small art museum and historical society museum. The town she lives in is heavily frequented by tourists, and she noted that they were often disappointed at the lack of theatre performances and at the shabbiness of the art and historical society museums. Although everyone involved in these groups wanted to improve them, they delayed because the improvements would be very costly; a theatre troupe would have to be started from scratch, and the museums needed large capital improvements.

By 1973, our donor had amassed what she calls "a small fortune." She had never given any money to charity beyond her regular membership dues in these civic organizations. Her simple lifestyle kept people unaware that she was wealthy. "I had a strong sense that I needed to 'save for the future,'" she says. "One day I realized that the future never comes. I saw that so far I had spent my life waiting for various things to come along in the future: the right man, the right job opportunity, the right house to buy, the right moment to say something..."

Now she was waiting for the funding to materialize to promote the arts in the community. She stopped waiting, and called a meeting of people interested or involved in arts endeavors, including some of the teachers from the high school where she had taught. From this meeting came an ad hoc group which decided to do a survey to assess the cultural needs of the community and to set priorities for meeting them. They collected opinions not only from local citizens, but also from business owners, tourists, and people in the surrounding smaller communities. They discovered three critical needs:

- 1) A way for young people who could not afford private lessons to be involved with music and theatre,
- 2) a better facility for the historical society museum,
- 3) a theatre company.

Although many people were willing to give some money to help with these concerns, major funding was needed. The donor explains, "Most people wanted to 'get a grant.' I did not feel like waiting any more, so I decided to stop saving for the future, and to give, as a challenge, \$25,000 for each of the three priorities. In addition, I pledged to raise as much money as I could, and to give at least \$10,000 to each of these things every year."

With this announcement, the projects quickly proceeded. Another donor gave one of the oldest and most stately homes in the community for this historical society museum. The teenagers formed an orchestra, and now pay the high school teacher to instruct them. In addition, a scholarship program has been set up to send disadvantaged students who wish to study music to college. The teenagers raise the money for the scholarship fund themselves, and it is matched by a private foundation.

This year, the theatre enters its fifth season, and is attracting a large number of tourists; this pleases business owners, and encourages them to support the theatre.


Despite being instrumental in the creation of these three capital campaigns, and raising for them more than

\$1.5 million, this donor considers herself unsophisticated about fundraising. "I simply ask people to give whatever they can," she says. "I tell them how much we need and how far we have to go, and what I have given. I think because I have given so much money, people feel pleased to be able to participate for less than their life savings."

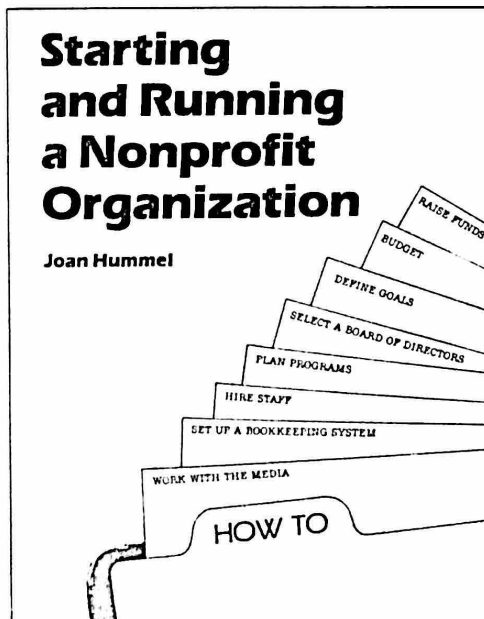
What has she learned from all this work? She said the most important lesson is that if you want something to get done, you have to start it. She also feels that people value things more when they have helped pay for them.

"The arts are always going to be regarded as frivolous, and will always take a back seat to 'human needs.'" So, artists must learn to raise the funds they need themselves, rather than waiting to be discovered by the munificent Patron." Asked what she thinks about the arts vs. human needs dilemma, she explains, "Art is a human need. You have helped someone out of alcoholism, domestic violence, unemployment or racism, or you have changed laws in those areas, but for what? I

think, so that people can realize their full potential they must have access to a sense of culture, and that must include museums, theatres, symphonies, a sense of history, and good literature that you are able to read. Art is fundamental to a life that includes any gentleness."

She summarized her philosophy of giving money, "People see giving away their money as a duty or obligation. I always hear people talking about, 'I should give to this or that.' But I think giving away money is an extraordinary privilege. First, to have any money to give away, when so many people are unemployed or living at poverty levels, is amazing. Second, that money can make so many things possible—more than any other resource because it buys all other resources needed—means that when you give away a lot of money, you have the pleasure of providing in quantity the most needed thing. I love giving away my money, and I give away alot. I give at least a third of my income every year. I try to help people see what a pleasure and privilege it is to give away money." —KK 

## Book Review



### *Starting and Running a Nonprofit Organization* by Joan Hummel.

University of Minnesota Press, Minneapolis,  
Minnesota, 1980.

147 pp. Cloth \$20.00, Paper \$10.95.


*Starting and Running a Nonprofit Organization* is a book that should be on the shelf of every nonprofit agency. The book was designed "for those who are forming new programs or reorganizing existing ones." It is a handbook in the best sense of the word. Samples are provided which help clarify the meaning of certain sections. Work-

sheets are also included, and have been designed in a way that they can be duplicated and actually put to use. Finally, every section includes a bibliography for those interested in learning more.

The book will prove most useful to those just starting a new organization. The author answers some of the hard questions that everyone asks. Should we incorporate? What should we do first? Who should be on our Board of Directors? What role should the Board play? How do we write by-laws? It also brings to the reader's attention many issues that new organizations don't deal with initially and regret it later such as how to develop personnel policies, and how to establish a methodical process for program planning and evaluation.

The value of the publication is not limited to the new organization starters. The author writes, "It is an introduction to the basic concepts and skills of agency planning and development." She continues, "Many worthwhile and needed programs ultimately fail to reach their ultimate goals because they were not put together well." In other words, part of the essentials of organizational survival is learning effective management and planning skills. Those who have not learned these skills will find themselves sooner or later facing problems that plague the great majority of organizations. The problems might be related to unclear job descriptions for staff, lack of definition of the role of the Board, or inability to effectively evaluate the programs or develop effective fundraising plans. This handbook does not provide easy answers, but it does provide concrete and very thoughtful advice that will help in working towards solutions.

*Starting and Running a Nonprofit Organization* is a book that was needed years ago. Better late than never. It is clearly written, easy to understand, and usable. It is a book that anyone involved in organizational development will want to have around, to refer to from time to time, for ideas and inspiration.

—LH 

## Back Issues of Grassroots Fundraising Journal Available

Many readers have inquired about getting back issues of the *Grassroots Fundraising Journal*. Limited quantities of five of the Journals are available for \$2.50 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 Four (August, 1982)*  
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*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

*Volume One, Number Six (December 1982)* Record Keeping for Fundraisers; Earth to Board Members; Run For Justice; Fundraising Events (Part Four): Starting At Home

*Volume 2 Number 1 (February, 1983)*  
So You Want Your Board to Raise Money; Four Months on the Road to Peace: A Fundraisers Journey; Record Keeping (Part Two) Research.

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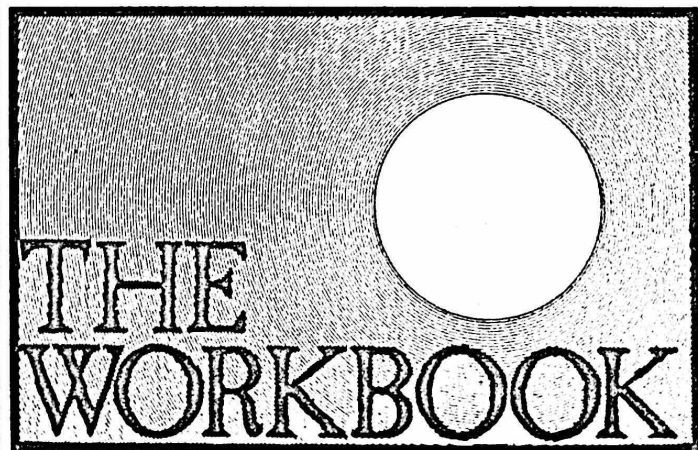
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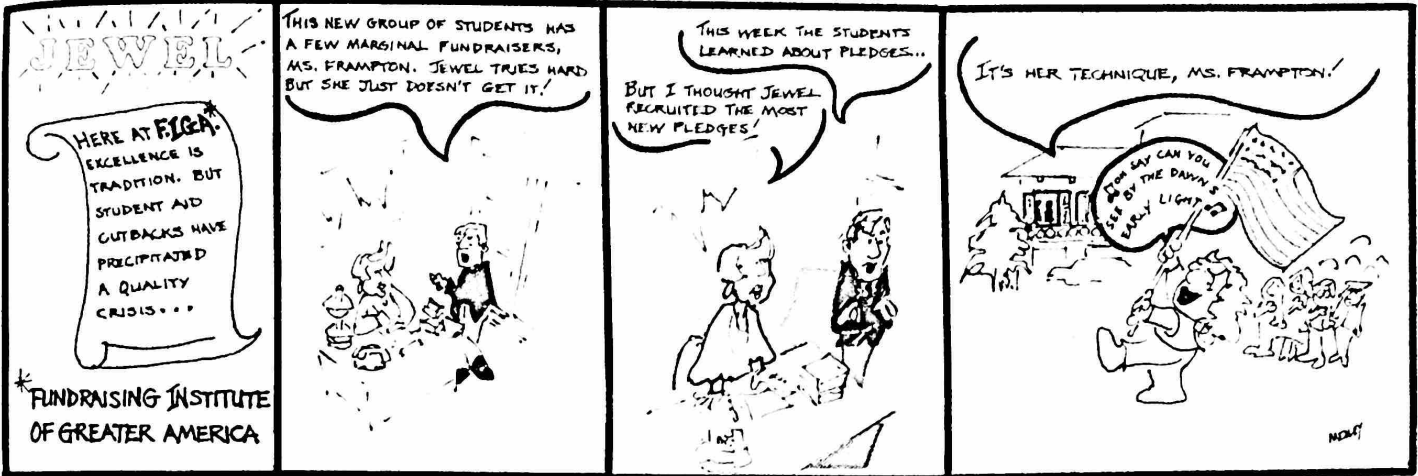
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The *Grassroots Fundraising Journal* is published six times a year: February, April, June, August, October, and December. It is published in San Francisco, California.

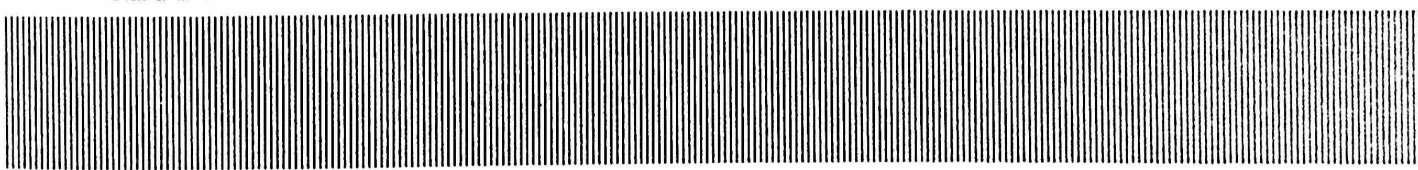
*Publishers and editors:*  
Kim Klein and Lisa Honig

*Contributing to this issue:*  
Joan Flanagan, Lisa Honig, Kim Klein, Donna Medley, Nicole Gotthelf  
*Copy Editing:* Nancy Adess

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*Typesetting:* KeyStroke / *Layout:* Michael Cox / *Printing:* Inkworks Press

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