

Grassroots Fundraising Journal

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An Introduction To Phone-A-Thons

By Susan Eisele

ALTHOUGH MANY PEOPLE'S initial vision of a phone-a-thon is of exhausted workers falling asleep over a table piled with telephones, a phone-a-thon is in its simplest terms, sitting down with others and calling people to ask them to support your organization with a donation. (A Phone-A-Thon is similar to a Special Event in that it is time limited and it is a good way to get volunteers actively involved in fundraising.) (For many, phone-a-thons are an easy way to learn to ask for money.) Almost every group that has tried a phone-a-thon reports that they are also a lot of fun.

There are many ways to tailor a phone-a-thon to your organization's specific goals and abilities, but there are also some basic steps to help ensure success. In this article we will examine some advantages of phone-a-thons over other types of fundraising as well as the planning, training and follow-up necessary for a successful phone-a-thon.

Phone-A-Thons or Direct Mail?

The two main ways to reach a large number of people to enlist their support is through Direct Mail and Phone-A-Thons. Many groups are deciding to use phone-a-thons instead of direct mail appeals for a number of reasons. First, phone-a-thons are generally **MORE EFFECTIVE**. As people receive more and more direct mail appeals, the average appeal is likely to get lost in the shuffle. A phone call on the other hand, *requires* a response of some kind; furthermore, people are usually more reluctant to say no to such a personal appeal. (In contrast to the 1-3% return anticipated from a direct mail appeal returns from a phone-a-thon are 10% or better.)

Second, phone-a-thons are **TIME LIMITED**. Whether your phone-a-thon takes place on one night or on several evenings, all of the calling is done from 6-9 p.m. This definite time commitment is appealing to everyone. Also, a fundraising activity where literally every

one can pitch in and have real success in a limited amount of time generates a tremendous enthusiasm which can multiply into further successes later on.

Third, phone-a-thons also **GENERATE PUBLICITY**. Phone-A-Thons can be announced to the local press. Some organizations have successfully used local radio and television stations to give live coverage to the phone-a-thon. Others have invited local officials to "kick off" the phone-a-thon. The activity generated by a phone-a-thon makes it potentially newsworthy to the local press.

For these reasons (as well as others particular to your organization) you may opt for a phone-a-thon instead of sending a direct mail appeal. If you do use the phone-a-thon there are some essential items you must have.

Components for a Successful Phone-A-Thon

First, you must have **NAMES** and **PHONE NUMBERS** of potential donors. Ideally these names will be of people who have either expressed an interest in your organization, or are past supporters or support other organizations like yours. This is a "hot list". In the absence of a hot list use a "warm" list: names of people who know people in your group, or know of your group, but don't support it currently. One group even had success in going through the phone book; but this is not advised and should be considered a last resort.

Second, you must have **CALLERS** and **TELEPHONES**. Usually the callers are volunteers and Board Members in your organization, but they can also be volunteers from another civic group. Later we will go into the training the volunteers will receive; at this point keep in mind that **More is Better**. The average number of volunteers for a phone-a-thon should be 6-12 a night. Of course you must have **TELEPHONES**. Many groups that have had successful phone-a-thons say that one of the key factors was using a large room

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STATE OF THE JOURNAL

Readers often ask us various questions about the *Journal*—how we are doing, how many subscribers we have, what our plans are for the future, etc. Now at the end of our second year in publication, it seems a good time to answer some of those questions.

Response To Journal: We are pleased by how well the *Journal* has been received. It has been reviewed in almost every major fundraising publication, as well as in many newsletters, periodicals and magazines put out by various membership organizations. In every review which we have seen the comments have been positive, and in many cases, quite effusively so. Some comments are: the *Journal* is readable and down to earth, and it contains specific hands-on information, that non-profits need to know.

Subscribers: We now have 850 subscribers. The *Journal's* circulation is at least twice that high—some of our subscribers are Foundation Centers and other library collections, and many readers report passing the *Journal* on to others. In some instances the whole staff and Board of an organization is encouraged to read the *Journal*, in others readers report that their copies are "permanently borrowed" by friends of colleagues.

There is a surprising variety of organizations among our subscribers. Many national organizations subscribe, as well as established groups such as the YWCA's, Planned Parenthoods, Girl and Boy Scout Councils. City and county libraries from many parts of the country have subscribed, and in two cases, a city itself has subscribed. Scattered throughout our list are hospitals, universities and colleges, private schools and churches. The vast majority of subscribers are social change or social service organizations with budgets of less than \$300,000. In fact, many subscribing organizations have budgets under \$50,000. Although the information we publish is useful to a wide variety of organizations, we will continue to focus on the needs of small, grassroots organizations working in and for social change.

The majority of our subscribers are advocacy organizations and direct service organizations. The most common categories of groups are feminist, environmental and human rights groups. Animal welfare and arts organizations are also well represented.

We have subscribers in all 50 states, and about a dozen from foreign countries including Switzerland, England, Canada, Mexico, and Brazil. The majority of subscribers live in California where the *Journal* is published, and the majority also live in urban areas, although at least 20% of our subscribers live in small towns (population under 50,000) or rural areas.

Future Plans: We intend to keep publishing the *Journal* as long as we have good material to present, which is as far into the future as we can see. Upcoming issues will continue the series on phone-a-thons begun in this issue, Board development, and special events. We will also report on using computers and other technology in fundraising, raising money in specific communities (such as minority, rural, conservative, poor, etc.) raising money by mail, canvassing, and success stories.

During the first six months of 1984, we will publish a collection of articles from the *Journal* on Boards of Directors, planning for special events, asking for money, and record-keeping. Many of the back issues containing these articles are sold out, and we think this new format will be helpful. Watch upcoming Journals for information on how to order.

Subscription Rates: Due to rising publication costs over the past two years, and to enable us to change the format of the *Journal* to include more information and more illustrations, the subscription price will go up in 1984 to \$20.

You will still be able to subscribe for multiple years at a set price, and of course, those of you who have already subscribed for more than one year will not pay more. Price increase will be effective February 1, 1984.

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with lots of phones so workers could see each other and cheer each donation. If your organization is not set up with three telephones, investigate your resources. Phone-a-thons have been held in Real Estate offices, law offices, even Bank Board Rooms. All of these places donated space and the use of their telephones with the qualifications that no long distance calls were made and calling was done after normal working hours.

Third, you must have some INFORMATION ready for

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Phone-A-Thon is similar to a Special Event in that it is time limited and it is a good way to get volunteers actively involved in fundraising.

volunteers to use in answering questions that come up during the calls. This is especially important if you are using volunteers from outside your organization. Successful phone-a-thons also have one or more "experts" on hand at all times. Questions are infrequent with people acquainted with your program, but if you are calling people who do not know about your organization the questions increase. Each volunteer receives some training but an expert should be there to answer tough questions.

Fourth, you must have ENVELOPES, BROCHURES AND PRE-TYPED LETTERS on hand. These are essential for the follow-up to pledges.

Finally, it is important to have certain things around that makes the work fun for the volunteers. FOOD, coffee, fruit, and juice are essentials. (Don't bring anything into a donated space, however, that is potentially messy or sticky.) LARGE SIGNS OR POSTERS that mark dollars pledged that night are good morale boosters as are banners of appreciation for the volunteers. Some groups even use noise makers when a donation is pledged. Decide what is good for your group but try to keep everything as festive as you can.

When you have all of these essential items, and your group has chosen the date(s) for your phone-a-thon, you're ready to go.

The Big Night

During the last ten minutes before calling begins you should give a strong "pep talk." Reiterate the evening's goal, remind volunteers about why they are there, and be sure they know you feel the evening will be a success. Downplay the fear of getting a hostile response; if your list is good it should rarely happen; if it does happen it should not matter to the phone-a-thon's overall success.

Volunteers should be at the Phone-A-Thon location at 5:15 p.m. When they come in they should see cards with names, addresses and phone numbers of prospective

donors at each telephone. Any relevant information about that person should be on the card too; notes like, "previous donor \$25 in 1982" or "Sister of Mary R., staff person." The volunteer may want to refer to these facts during the call. There should also be a sample script for each caller (see example 1), a fact sheet and brochure about your organization with examples of how to answer typical questions (see example 2) and copies of two different letters, one for people that will pledge, and another for people who were not at home (example 3 and 4). Snacks and whatever you have prepared for making the night fun should be out. As the organizers, it will be up to you to set the tone for the evening. Some volunteers may be nervous about calling strangers, so it is important to convey to them from the outset that this is going to be a fun, easy and rewarding experience. If the media or any officials are present it is doubly important that volunteers feel at ease.

At about 5:30 all of the volunteers should be assembled. This is the time to take about 15-20 minutes to run through all of the materials at the telephones, do some role plays and answer any questions the volunteers have.

Here are some points to cover:

Volunteers often report that the first call is the hardest. At first people try to follow the script word for word; eventually as the callers develop their own style they will

Sample 1: Script

Hello, my name is _____, and I am a volunteer with _____. Can I speak to you for a minute?

Thank you. I am calling tonight as part of a phone-a-thon we are having to raise \$_____ for _____. Are you familiar with our work? (Or did you get our recent appeal? Did you see the article about us in the paper?) (Depending on answer) We are a group of concerned citizens working to protect/enforce/organize about _____ issue. (Give a thirty second summary of your work.)

We are asking people to help us with a gift of \$15, if possible, tonight. So far _____ people have pledged \$_____. Would you care to make a donation?

May I put you down for \$_____?

Thank you very much. Let me just get/verify your address.

We really appreciate your help. I will send you a return envelope in tonight's mail. Good night.

use the script less. Many volunteers, either out of nervousness or simply wanting to contact a lot of people in one night, will speed through the exchange. Although lengthy conversation is to be avoided, remind your volunteers that by taking a little more time and exploring options like monthly pledging, they might convince people that they can afford to support your organization. Your volunteers should listen, but should not let themselves get drawn into sociological and philosophical discussions. They are calling for one reason on that night and that is to get pledges. If

volunteers call friends, they should not let the conversation get away from the point of the call. Volunteers should be able to make 20 calls per hour.

After every call the volunteer should note on the card what transpired. Notes can range from, "Pledged \$25" to "7:10 p.m., busy, call back at 8:30 p.m." to "9:00 p.m., tried all night not at home" to simply "take off list." It is important to have every card noted in some way. Even a small phone-a-thon will go through 200 names in one night and it can be confusing later on if notes aren't made or aren't clear.

Sample 2: Answers to Typical Questions

"What is the Coalition's Funding?"

From our membership. We rely on people who contribute anywhere from \$15 to \$1,000 and more. We get no State money at all. We do get some small help from Foundations, most often for special projects. We also have special events throughout the year to round out our funding.

"Where do our members come from?"

Our membership is composed of women and men; health care providers and consumers; students; health care advocates. Most of our members are from California but we have members all over the United States and Canada, Australia and New Zealand. Most of our members come to us through referrals by other members.

"Who makes the decisions in the coalition?"

Our decision making structure allows input from all parts of the Coalition. Major policy and program decisions are made by the Board. Members may give their input to any decision at the Coalition's Annual Meeting.

"What is the overall financial health of the Coalition?"

Right now it is very good. 1983 has started off well for us and it continues to look good for the rest of the year, provided we keep the members we have and their support. Our future depends on your continuing support.

*From: Coalition for the Medical Rights of Women,
San Francisco.*

When prospective donors say they will pledge, they will be sent a thank you letter. The volunteer who talked to them should sign the letter. Some volunteers add notes at the bottom of the letter that refer to something that was said in the conversation. This serves a dual purpose of jogging the donor's memory when they get the letter and reinforcing the personal contact made. The letter and a return envelope should be put into an addressed envelope. The "yes" letters are then stamped and should go out immediately after the phone-a-thon.

People who are not at home should be tried later in the evening. When someone expresses a lack of interest in making any contribution, a note to that effect should be made on his/her card and the card should be put aside.

At about 7:15 the phone-a-thon organizer should set out some more substantial food and call for a quick total of pledges from each volunteer. Volunteers will need a break after calling for over an hour. Each volunteer can pause when he/she wants, but calling should never stop completely. By getting a quick total you will be able to say to

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prospective donors, "we're trying to raise \$2,000 tonight and so far we've got \$750 pledged." Plus, seeing how much has been pledged is a terrific morale boost for the volunteers. If your phone-a-thon is being aided by live radio or television coverage, these totals are important to add to the excitement of the night.

Calling should continue until 9:00 p.m. at the latest. At 9:00 your volunteers should finish up any notes, assemble the cards of people they could not reach, and make a final tally of the amounts pledged. Take a few minutes to savor your success. If the media is there, this is the time to thank the community and your volunteers publicly. After a few minutes remind your volunteers that there are still a few follow-up tasks. All of the people who have pledged should already have letters written and addressed by the volunteers. People who are not interested should be taken off the Master List that night. That leaves the people who could not be reached. Volunteers should start addressing envelopes and stuffing them with signed "sorry we missed you" notes along with return envelopes. Other volunteers can be sorting the completed "sorry we missed you" letters into zip code bundles for bulk mailing (if appropriate). When this follow-up is done there is just clean up, publicity follow-up (probably the next day) and the record keeping of the response.

Successful Set-Ups for Large Phone-A-Thons

There are different ways to set up large phone-a-thons that eliminate potential mistakes; what follows is a brief examination of two of these.

Team Callers. In this situation volunteers work throughout the evening in pairs. Between them, they alternate calling and record-keeping jobs. Although this requires a

Sample 3: Letter to People who say "Yes, I will give"

Dear ,

Thank you so much for joining/renewing with your gift of _____ to *Worthy Cause* this evening.

As you probably know, *Worthy Cause* is primarily supported by donations and subscriptions from people like you.

Your gift will help us continue our work (*describe program or goals briefly*).

Please fill out the enclosed card and send it, with your check, in the enclosed envelope.

Thanks again,

Sincerely,
Worthy Cause Volunteer

Sample 4: Letter to People Who Were Not at Home: "Sorry We Missed You."

Dear * ,

Sorry we missed you this evening. We tried to call you because we wanted to ask you to join/ask you to renew your membership/tell you more about *Worthy Cause*.

Worthy Cause is _____. We have been working for the rights of everyone since 19____. Our main program goal for 1984 is: _____.

I hope you will want to join/renew. For your gift of \$_____, we will be pleased to send you our quarterly newsletter, *Changing the World*. For a gift of \$50 or more, we will include a beautiful/profound/important calendar/book/picture.

Please take a moment to read the enclosed brochure, then fill out the enclosed card, and mail it with your check in the envelope provided. I look forward to hearing from you.

Sincerely,
Worthy Cause Volunteer

**If you send these letters by bulk mail, each of them must be exactly alike. In that case, the letter might begin "Dear Friend" and be signed by one person only.*

lot of volunteers, it ensures that callers will not feel exhausted at the end of the evening. It also decreases the incidence of mistakes. Particularly those volunteers working on their first phone-a-thon report that working in teams and sharing the evening is supportive and less

threatening. As in the small phone-a-thon, volunteers are responsible for a lot of information. It's important that each volunteer has a clear understanding of what to do every step of the way.

Central Desk. Groups without a large number of volunteers can set up a central desk where one person takes care of all follow-up correspondence and information cards as the phone-a-thon progresses. This person also keeps track of amount pledged and acts as "cheerleader" for the phone-a-thon. With one person assigned to these chores there is no need for each volunteer to stop to do correspondence and record keeping, thus making more phone calls possible in a night.

Training Materials

Donor Cards. These cards can be as detailed as you wish. Many groups don't have a lot of information on prospective donors so all that might be on these is a name, address and telephone number. Some groups color-code these cards so the volunteer will know where each name came from—raffle ticket sales, special event guest book, etc. Plan to have about 200 cards ready for each night of your phone-a-thon. (Figure 20 calls per hour per person times number of volunteers.)

Questions and Answers, Brochures. These should be on hand to help the volunteer answer questions on the telephone. Questions that will be asked will probably not be too detailed, so the answers can be simple also. The brochures can help the volunteers answer the questions about general programs and services. Most people will not ask questions at all, however, it is a real help to the volunteers'.

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peace of mind to know they can find answers.

Scripts. Scripts are just suggested guides. Each caller can incorporate the information into a style that is comfortable for her or him. If a script is not used, remind volunteers to introduce themselves at the start of the call (some may wish to only use their first name) and, at the close of the call, to recheck the address on the card.

Pledge Letters and "Sorry We Missed You" Letters. Remember that "YES" letters get first class stamps and should go out that night along with a return envelope and letter. "Sorry we missed you" letters should go out the night of the phone-a-thon as well, but if there are more than 200 of them they can go out by bulk mail if you have a permit. Any people who say they simply cannot afford to support your organization at the time of the phone-a-thon should stay on the Master List and be called the next time you have one.

Publicity

If you are doing a large phone-a-thon your organization may choose this as an opportunity to publicize your pro-

Dear Joan



Dear Joan, Can you recommend a good book to give my favorite fundraisers for Christmas or Hannukah?

Santa's Helper

Dear Helper,

Fundraising expert Steve Paprocki delighted me with the story of his visit with the Vice President for Fundraising at a Benedictine College in Minnesota. They want to raise \$10 million and offered the challenge to Steve. He says, "While I was making up my mind, I looked at the monk's desk. He had three books on it: the Bible and your two books!" (I have commissioned a photo of this scene for my publisher.)

Assuming your fundraiser, of course, already has the trinity of success: *The Grassroots Fundraising Book*, *The Successful Volunteer Organization*, and a subscription to "The Grassroots Fundraising Journal," there are two books I highly recommend to help fundraisers get through the end of the year and enjoy a more pleasant and profitable 1984.

The first book is *How to Get Control of Your Time and Your Life* by Alan Lakein (1973, Signet, \$2.50). It will help you do just what the title says.

Fundraisers face a particularly sadistic version of Parkinson's Second Law that "expenses rise to meet income." We know that it doesn't matter how fast we can raise money, somebody else can always spend it faster. So we are always facing more to do, and this year's success only creates higher expectations for next year.

Lakein's book will teach you how to solve this dilemma

grams. Radio stations have helped phone-a-thons by giving them live coverage the night of the event. To make this an especially attractive idea, you may want to ask a local official to be on hand to start the phone-a-thon by making the first call. Volunteers who have worked at large phone-a-thons say that it sometimes helps to tell callers, "We are being covered by KXYZ tonight" to underscore the organization's legitimacy.

Whether you receive live coverage or not, all of the local media should receive a press release announcing the phone-a-thon and when it will take place. The day after the phone-a-thon, report to the media how much money was raised, the other facts of your success. Use a letter to local

by working smarter instead of harder, clarifying what you really want to do, and helping you to do first things first. This is the nuts and bolts advice for liberating yourself from interruptions, trivia, and procrastination.

The second book I like to give people is *Finding Values That Work, The Search for Fulfillment* by Brian O'Connell (1978, Walker and Company, \$7.95) Don't be put off by the title and think this is New Age nonsense for the navel gazers. O'Connell wrote this book after ten years experience as the National Executive Director of the Mental Health Association as well as even more experience as husband, father, church-goer, writer, and thinker. He shares clear, simple, tested ideas that work for him about the bigger questions facing anyone active in social change: work, money, marriage, family, religion, getting older, coming unglued, and staying on course. You won't agree with all his solutions, but you will get a great start on finding solutions that work for you.

Both of these books are the kind you can read once a year and find something amusing and helpful each time. As good organizers, we should practice what we preach. If our job is helping other people get control of their lives, we should also be doing the work to get control of our lives. If you want to have a simpler, saner, and more satisfying 1984, get these books.

On the other hand, if you simply want to escape the real world of budgets and quotas for a while, here are my favorite new discoveries in the world of fiction. All of these will transport you to another time and place and introduce you to unforgettable characters. They are: *Daughters of Copper Woman* by Anne Cameron, *My Antonia* by Willa Cather, *Dinner at the Homesick Restaurant* by Anne Tyler, and *The Color Purple* by Alice Walker. Enjoy!

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."

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

newspapers or an advertisement to thank all of the people who donated money (not by name) and all of the people who helped (perhaps including names). It is important that this follow-up publicity be done, both for the image of your organization and for the people who will be getting the "sorry we missed you" letters later on.

Susan Eisele is the fundraising Coordinator for the Coalition for Medical Rights for Women in San Francisco, California. She has been in fundraising for the past three years, and is a specialist in grassroots fundraising. Prior to coming to the Coalition for the Medical Rights of Women, she was the Fundraising Coordinator for the shelter for battered Women in Olympia, Washington. She has coordinated many successful phone-a-thons.

Twenty-Nine Ways That Board Members (And Other Volunteers) Can Raise About \$500 Without Very Much Effort

ALL GOOD FUNDRAISING plans have one thing in common: they show a diverse number of sources for their income. The Board of Directors, as we have stressed repeatedly in the *Journal*, plays a crucial role in the selection, implementation, and evaluation of fundraising strategies. One strategy is for Board members to use themselves. That is, in addition to other ways that Board members may participate in fundraising, they individually commit to raising and giving a certain amount of money, or commit to working by themselves on specific strategies with no financial goal attached.

If Board members do fundraising on their own, it is a good idea for them to write up their plans. This "contract" allows staff to know when they might be called for help, insures that events don't happen on the same day, or the same donors aren't solicited by several Board members, and also helps to remind them of their commitments.

In order for this method to work, the organization or the Board fundraising committee should think of many specific ways they could actually raise money by themselves. The twenty-nine ways suggested below are by no means an exhaustive list, nor will they all work for every group. Few

Board members could use all twenty-nine ways, but almost any Board member should be able to use two or three of them.

All of these methods have been used by different volunteers on a wide variety of organizations. Some methods are much more popular than others. Some depend on access to certain resources.

Presenting Board members with twenty-nine ways (or more or less) that would work for your organization helps counter the excuse, "I would help but I just don't know what to do." Having each Board member write out a plan, with goals and a timeline, also gives them a sense that if they do their best with this plan, they will have helped significantly. Many Board members express the thought "I always feel that fundraising is never ending, and that no amount of effort is enough. Whatever I do, I could have done more, and probably should have." This feeling causes high turnover, burnt-out, and resentment in Boards. Specific fundraising contracts can help avoid that.

In addition to the twenty-nine ways Board members can raise funds, we have included a suggested format for a contract, and examples of some completed contracts.

Twenty-nine Ways to Raise \$500 (in no particular order)

1) Give it yourself. (This is the easiest way for those who are able, although if you are able to give this much money you should be helping raise much more than \$500.)

2) List all your friends who are interested in your organization, or similar organizations. Decide how much each one should give. Write to them on your own stationery, include a brochure from the organization, and a return envelope. Phone those people who don't respond in the first two weeks. Some people will need 10 friends to give \$50, and some people will need 50 friends to give \$10. Most people will need a combination such as:

2-3 @ \$50 8-10 @ \$15
4-5 @ \$25 15 @ \$10

3) Give part of the \$500. Then ask your friends to join you in giving \$25, \$50,

or whatever your gift is. This is most effective because you are not asking them to do anything you haven't done.

4) Set up a challenge campaign. Challenge gifts can be quite small. Tell people you'll give \$5 for every \$25 they give, or will match every \$10 gift up to ten gifts. For added suspense, make this challenge during a fundraising event. You or the host/ess can announce, "We now have the Dave Buckstretch Challenge. For the next five minutes, Dave will give \$5 for every new member that joins Worthy Cause."

5) If your organization has a diverse funding base, with several grassroots fundraising strategies in place, use them all:

Sell 100 raffle tickets	\$100
Give \$50	50
Bring 10 people to an event which costs \$10	100
Buy two gift memberships (@ \$15)	30

Get 15 friends to join
(@ \$15)

225

6) Help with your organization's phone-a-thon. Bring the names of people you think would like to join and call until you have raised \$500. Or: trade names with someone in the organization and call their friends until you have reached \$500. This is particularly effective for the people who are shy about asking their own friends for money, but not afraid to ask people they don't know.

7) Acquire mailing lists for your organization. If you belong to another group, perhaps you can effect an exchange, or perhaps you have access to a list of members of some other group. You can ask all your friends to give you the names of 10-15 people they think would like to join. You would need to recruit about 25 members at an average gift of \$15. Depending on how "hot" your list is, you might need as few as 200 names (to do a bulk mailing) or as many as

1500-3000 (if you only expect a 1-2% response.) You would have to have a greater response if you wanted the mailing to pay for itself and also generate \$500.

8) Give the organization something they need that is worth \$500, such as a new typewriter, filing cabinets, couch, adding machine, component for a computer, etc.

9) Pledge \$20 a month, and get one other person to do likewise. Then sell \$20 worth of raffle tickets.

10) Teach a seminar on a topic you know:

Fundraising; Knitting; Organic Gardening; Organizing; Proposal Writing; Writing Environmental Impact Reports; Gourmet Cooking; Dog Grooming; Starting Your Own Business.

Charge \$25-35 per person, with a goal of 25-30 people. Either you absorb the cost of promotion, or have enough participants to pay yourself back.

11) Give some or a lot of things to your organization's garage sale, making sure it is worth \$500, and then help to sell it all.

12) With 4 or 5 friends, have a spaghetti dinner at a church or union hall, or other big room with a large kitchen. Charge \$5 per person, and feed more than 100 people. You can charge extra for wine or garlic bread, or for dessert.

13) Have a fancy dinner at your home, or a regular dinner at someone's fancy home. Serve unusual food or gourmet food, or have special entertainment. Charge \$25 or more per person, and have 20 or more guests.

14) Get three friends to help you have a progressive dinner. Start at one person's home for cocktails and hors d'oeuvres, progress to the next person's house for soup or salad, the next person for the main course, and the last person for dessert. Either charge by the course, or for the whole package. To make it extra special (and much more expensive), get a limousine for the evening, and chaperone from house to house.

15) Host a wine and cheese party. Do not charge admission, and invite as

many people as you can. During the party, give a short talk about your organization, and ask everyone to consider a gift of \$25, \$50, \$100 or more (depending on the crowd). Either pass out envelopes and ask people to give now, or after the party contact everyone individually who came to ask for a major gift. Indicate that you have given, and if appropriate, how much you have given.

16) Get your gambling friends together. Charge \$3 to get in, and have a poker evening, asking that every "pot" be split with the organization. Individuals win, and so does the organization. You can charge extra for refreshments, or include one or two glasses of something with the price of admission. Also watch the laws in your community on this one. (In some communities it is illegal to gamble, even in your own home.)

17) Do one fundraising event every other month that nets at least \$75. This might look like:

Poker Party:	\$100
Fancy dinner (8 people x \$25)	\$200
Sell 50 raffle tickets	\$50
Booksale	\$50
Recycle newspapers	\$100

18) Solicit small businesses, churches, or service clubs for \$500. If you are active in a church, or own your own business and are involved in business organizations or service clubs, this can be very effective. You can often raise \$200-\$500 with a simple proposal and oral presentation.

19) Take a part-time job in addition to your present work, and give everything you earn up to \$500.

20) Ask 5-10 people to save all their change for 3-5 months. You save yours. Count it at the end or the prescribed time, and use one of the other methods to raise the rest. (You may not need to.)

21) Ask 2-5 friends to help with a bake-sale, booksale, or garage sale. You and your friends bake the goodies, or get the books, or the other stuff required for the sale. In addition, you and your friends advertise the sale, staff it, and help clean up afterwards. This is an excellent way to get people involved in fundraising with out ever actually asking them for money.

22) For the fairly rich: Give your organization \$5,000 as an interest-free loan for a year. They invest it, earn 8-10% (compounded daily), and at the end of the year, they give you your \$5,000 back.

23) Sell your organization's materials, buttons, T-shirts, bumper stickers, or whatever else they have for sale. Also, help distribute these to bookstores or novelty shops.

24) The Farming Out Method: Entice 5 friends to sell 100 raffle tickets each, or to raise \$100 however they like. Share this list of suggestions with them. Give them a nice dinner at the successful end of their efforts (or a bottle of good liquor, or a weekend away).

25) Get a famous or popular person to do a special event. Watch the costs on this, or you may lose money.

26) Invite people to your birthday party, and ask that in lieu of gifts, they give money to your organization.

27) Conduct a volunteer canvas. For one evening, you and a bunch of friends take literature to all the neighborhoods around you and ask for money at the door. Be sure to comply with city and county ordinances.

28) Lead or get someone to lead a nature walk, an architectural tour, a historical tour, a sailing trip, a rafting trip, or a horseback ride. Charge \$10-15 per person, or charge \$25 and bring lunch. Advertise this in the paper and draw in people outside your organization.

29) Start a pyramid dinner, or a chain dinner. Invite 12 people, and charge \$12 each. Get two people of the twelve you invited to invite 12 people each at \$12, and two people from each of those two dinners to have 12 people at \$12, and so on. Here's the income:

Your dinner:	\$12x12	\$144
From your dinner	\$12x12=12	\$288
From those dinners	\$12x12=12=12=12	\$576

Twelve is used in this example because it worked very well for the Nuclear Freeze Campaign in California, which was Proposition 12. In many communities, most of the income for the campaign was generated by 12x12 dinners.

--KK

Samples Of Fundraising Commitment By Board Member Or Other Volunteers

Example 1

I, First name Last name, will help Effective Organization raise \$_____

My Gift: \$_____ Indicate how payment of this gift is to be made. (i.e. by pledging monthly or quarterly, or one lump sum, etc.)

I will also:

1) _____

GOAL: \$_____

Staff help needed: _____

Date of event: _____

Date to begin planning event _____

2) _____

GOAL: \$_____

Staff help needed: _____

Date of event: _____

Date to begin planning event _____

I am interested in more training in fundraising: YES _____
NO. _____

_____ You may contact me for other fundraising efforts.

The following are three examples of how people filled out similar agreements. Their names and organizations have been changed.

I, Jane Mahoney, will help the Women's Rights Organization to raise \$1000 in 1984.

My gift: \$250, paid in one lump sum in January.

I will also:

1) Organize and teach a seminar on organic gardening. I plan to have 20 people come at \$25 each. I will pay for advertising it.

I will need some help finding a free room to have it, but no other staff help is needed.

Date of seminar: March 15, 1984

Date to begin planning: Feb. 1, 1984

Goal: \$500

2) I will contribute my couch to the garage sale. It is worth \$100, but we can settle for \$50. I will buy a classified ad in the city newspaper telling people where to come to look at it. I will also help at the sale.

Goal: \$50

Date: Whenever the garage sale is.

I will only need the staff to tell me a month ahead of the sale when it is, so I can get it in the paper.

3) I will work on the phone-a-thon. I will bring the names of 25 people and call them myself that evening, and will call anyone else I have time for.

Goal: 15 people actually joining @ \$15 \$300

Date: June 15

No staff help needed for my participation in the phone-a-thon.

Note: I plan to go \$100 over my goal, but in case something goes wrong, I will definitely make my goal.

Signed: _____

Example 2

I, Mathew Cornwall, will help Community Organizing Project to raise \$250.

My gift: \$5/month + \$60.

I will also:

1) Ask four friends to pledge \$5/month. I hope at least 2 will say yes, so that makes \$120. No help needed.

2) I will sell \$70 worth of raffle tickets. (If any of my friends win the cash prize, I will ask them to donate half of it.)

No help needed.

I will ask my friends by May, and sell the raffle tickets before the drawing. You can also ask me to help with other events if you need me.

Example 3

I, Carol Browning, will help the Advocacy and Action Task Force, raise \$500 (or more, depending on how valuable the things I get are).

My gift: \$50 paid in one lump, as soon as I can.

I will also:

1) Solicit a new typewriter for our office. I will work on this until March.

2) If that fails, I will solicit a computer. (I know some people in the office supply business, and the computer business, so I think I might succeed.) I will work on that until May. No staff help needed, I don't think, but if there is, I'll give plenty of notice.

3) If the above two fail, I will have a barbecue at my house on the Fourth of July. At least thirty people will come and pay \$10.

Goal: \$250 (I will take \$50 out for my expenses.) Staff help needed to send out invitations and prepare food.

4) I will get two other Board members to help me do a big bake sale at Suburban Shopping Center. We will get donated all the baked goods, and be there all day Sunday, June 14.

Goal: \$200 (maybe more.)

Maybe I'll do the last two anyway even if the first one or two are successful. Don't plan on it though, and don't ask me to do anything else unless you are truly desperate.

Think Before You Plunge

Advance Planning For Fundraisers

ADVANCE PLANNING is the backbone of all fund-raising activities. Nonetheless, it is a skill that seems not to have been sufficiently developed in many community organizations. Very simply, advance planning meant thinking through all of your organization's projected activities and estimating what kind of time, resources, and personnel will be required to implement them. On the macro-level, it involves planning all of the various activities that will take place during a particular period of time such as an annual fund-raising plan or a 3-5 year plan. On the micro-level, it involves plotting out every step that must be taken to implement one particular idea. The latter is the focus of this article.

Advance planning on the micro-level can be very important for fundraisers. It is the only way to gauge whether there is sufficient time to implement any particular idea. It is an effective way to set a calendar with deadlines. It is also a good way to create a basis for evaluating one's progress.

The following will illustrate the importance of advance planning.

It is now early December, and your staff or Board of Directors has just asked you, the fundraiser, if it might be worthwhile to do some end-of-the-year fundraising. It is not a bad idea. The end of the year is a good time to raise money. Many people are thinking about charity, they are spending a lot of money, and many are considering last minute tax deductions. However, the end-of-the-year begins during the summer for fundraisers, and without planning that far in advance, these months will probably not be very lucrative. A quick look at some of the possible fundraising schemes for the holiday season will demonstrate this point.

Marketing for the Holidays

People buy things during the holidays, and more and more, they seem to resent pouring their money into the profits of large companies. Almost anyone would prefer to see their money going to a good cause, especially if they are already feeling a little guilty about spending so much on presents. The key to marketing for the holidays is to develop products that people would buy anyway. Calendars, holiday cards, Christmas tree and Chanuka ornaments are all big sellers during the holidays. This is a good time to push your organization's T-shirts or posters. Some organizations have actually set up Christmas tree lots. One organization developed a calendar with tear-off form and envelope for their

member's monthly pledges. Marketing for the holidays is such a successful way to raise money that some of the larger non-profits, such as the Sierra Club and Unicef, have opened entire stores to display their items and now operate these stores as small businesses all year round.

Marketing during the holidays requires many months of advance planning. You need to create and produce your product, which could take 8-10 months. In order to sell enough of the product to make money, you need to begin sales no later than mid-November. You may need people to sell the items or announcements letting your members know of the product's availability. You may need to arrange an outlet or place to sell the item. Planning should begin early for effective marketing of money raising items.

Events

The end of the year is a good time to put on holiday related events. The major problem with this time of year however, is that there are really only two weeks between Thanksgiving and Christmas when people still haven't spent all of their money on presents and may still have some evenings free. The end of the year is a bad time to schedule a large fundraising dinner or luncheon, but it is a great time for a holiday party or open house. People go to lots of office parties during the holidays, and your organization could open its offices to its friends, clients and associates. Don't see these events as fundraisers, and definitely do not charge admission. See them, rather, as an opportunity to do some PR for your organization. They provide great opportunities to let prospective donors or members find out more about your organization without making a financial commitment.

Putting together an office open house takes four weeks. An invitation list needs to be compiled, an invitation must be designed and printed, and invitations must be mailed no later than 2 weeks before the event. That means that an event in mid-December must be planned in early November.

For the particularly creative fundraisers, the holidays are a very good time to think up a special event that in some way relates to the holiday season. In San Francisco, one of the most successful fundraising events is a sing-along *Messiah*, at which San Franciscans gather to sing Handel's *Messiah* under the leadership of the San Francisco Chorus. This event is so popular that it sells out many months in advance and is televised live for the thousands who could not get tickets. Obviously, planning for an event of this size must begin many months or a year in advance.

SAMPLE ADVANCE PLAN FOR HALLOWEEN DANCE

CALENDAR	LIST OF STEPS	LENGTH OF TIME NEEDED
October 31	Dance	
October 28-31	Buy decor, food, cups napkins, etc.	4 days
October 8-31	Make tapes of music	3 weeks
October 19	Mail invitations	2 weeks in advance
October 17-19	Address invitations	3 days
October 10-17	Pull together invitation lists	1 week
October 10	Invitation to printer	1 week before mailing date
October 3	Invitation to designer for typeset, layout & paste-up	1 week before due at printer
September 19-October 3	Find location for dance, decide on kind of entertainment, write copy for invitation.	2 weeks

Membership

The holidays are a wonderful time to expand your membership base. During this time of year people have a greater sense of concern about others. As a result, some organizations have found this to be one of the better times to send out membership mailings. As the end of the year arrives, people are also thinking about "turning over a new leaf." Joining your organization or sending you a contribution may have been one of those things they intended to do all year. An appeal arriving at this time could be just the kind of encouragement needed.

The most effective membership appeals involve follow-up phone calls. A letter should arrive and a follow-up phone call should be made no later than December 22. After that date people are far too caught up in the holidays to pay attention to your appeal. This means that letters need to be mailed no later than the first week in December if they are being sent first class and even earlier if they are being sent bulk-rate. Even without follow-up phone calls, the mailing dates remain the same. Obviously, to mail in early December, the drafting of the materials must begin in November.

Major Gifts Campaigns

Many organizations are using the end of the year to appeal to their donors for large, tax-deductible gifts. Major gifts campaigns take months of preparation. Prospects must be identified, solicitors must be recruited and trained, materials must be produced and distributed and time must be allowed to meet with each prospective donor to solicit the gift. Summer is the time when planning for any effective major gifts campaign must begin.

How to Do Advance Planning

The first step in advance planning is to list all of the tasks

that would be involved in implementing any particular fundraising scheme. If the scheme is one that you have never tried before, this may require doing some research. Find some people who have put on a cocktail party or created a calendar for sale and ask them how they did it. Find out how long each step took. Learn from their mistakes.


Next, look at each step in the implementation and spend some time estimating how much time is required for each step.

Finally, pick the date upon which you would like to see the activity completed. Work backwards from that date, listing each step and a date when you would have to begin that step in order to have enough time to implement it. (see example)

By putting together this kind of plan and calendar, you will be forced to think through all of the details of implementing any fundraising idea. This will reduce the risk of some detail falling through the cracks. It will also ensure that you evaluate how realistic it is to try to pull off an idea given the amount of time you have to do so. Careful planning may show that your projected completion date is unrealistic.

Be sure to compare your calendar plan to the rest of your organization's calendar. You may find that there are other activities already calendared that will render this plan unrealistic. You may also realize that there is a 3-day weekend that might require your revising your plan because businesses will be closed.

As you begin to make advance planning a regular part of your work, you will find that it will become easier to anticipate your activities farther and farther in advance. Soon you will find yourself wanting to plan beyond each individual activity and developing one and two year plans. Without question, this kind of planning will lead to greater organizational strength and much more effective and efficient fundraising activities.

—LH 

Profile of a Major Donor

THE DONOR WE INTERVIEWED for this profile lives on the East Coast in a penthouse apartment. In his mid-forties, he gives away money inherited five years ago when his father died unexpectedly. He is an only child, and his father's estate was evenly divided between him and his mother.

This donor had already become a successful business consultant, and although he was not rich he was comfortable, and looked forward to an ever expanding business. When his father died, he decided to give away the money he inherited at the rate of \$25,000 a year for the next ten years. At that point, there will still be a large sum left, and he will then decide what to do with it.

This man is an eclectic giver. he gives to large well established museums and to tiny struggling neighborhood organizing projects. He responds to direct mail appeals and to personal appeals, and he loves to be invited to special events at which he is asked for money. He buys raffle tickets, and will also give endowments.

Asked how he makes his giving decisions, he replied "It's totally based on the mood I'm in. I suppose that's irresponsible, but when you have money, you can do stuff like that."

I asked if the politics of the group had any bearing on his decisions. He replied, "You mean, do I give to right-wing groups? No, I'm moody, not crazy."

I gave up trying to establish a pattern to his giving, and asked about his experience with face to face solicitations. His worst experience, he said, was when an anti-nuclear group approached him for \$1,000. A Board member (We'll call him Bill Jones) with whom he had a nodding acquaintance, wrote to him, outlining the organization's work, and offered to meet with him. They set up an appointment. The donor told me that he had already decided not to give \$1,000, but he was willing to give \$500, depending on how well Bill Jones could describe the organization. Mr. Jones apparently came with an entirely different agenda. He began the meeting by saying that someone had done more research on our donor, and the research showed that he could afford a \$10,000 gift. Would he consider that? Our donor said, "Why should I consider it?" Mr. Jones said, "Because you have it and we

need it." He proceeded to explain the good work the group was doing in the area of anti-nuclear organizing. Though feeling that Mr. Jones was being a little pushy, our donor was willing to give him the benefit of the doubt. He said Jones seemed embarrassed to be there and very nervous. Our donor offered \$2,500, whereupon Jones lost his temper. "You make your money in part from war industries because you consult to _____ Corporation. You have probably made more than \$10,000 from that group alone."

Our donor was quite taken aback, and lost his temper in turn, saying, "You can have \$2,500 of my filthy dollars or none at all. Make your choice."

Jones sat quietly for a moment and then tried to apologize. "I'm sorry, people like you just make me angry." Our donor asked him to leave.

*"What's
important is that anybody can
ask me
for anything,
and I can say no."*

Later our donor sent the group \$500 as a contribution and an additional \$250 earmarked to hire a Board development consultant.

When asked how he felt about the encounter now (two years later), he said that after the initial shock wore off, he was not angry but puzzled. How could Bill Jones come to him and make a cogent, convincing presentation, only to lose his temper right when he had received a significant gift, even if not the gift he had asked for? For explanation, he said he thinks that one of the many injuries of class is a deep (and sometimes well founded) suspicion of the upper class (referred to as "them") by the other classes, who refer to

themselves as "Us."

While Jones never apologized, a staff person from the organization, in acknowledging the gift, added a footnote to her letter; "Bill Jones says hello."

What are the best ways to approach this donor for money? Be direct. Say how much you want and what for. Be proud of your organization and its work, and know specific details about it.

Gifts for his large contributions, such as books, T-Shirts and the like are not important. Sending personal notes, Christmas cards, thank you's, a note attached to the Annual report, etc. is what makes the difference for this donor.

I asked him how he felt about being approached for a contribution by someone who hardly knew him, such as the above case. He feels fine about it, he said. "What's important is that anybody can ask me for anything, and I can say no. I can't say no or yes without being asked."

Finally I asked if he assumes that groups to which he has given will ask him every year for a large gift.

Reply: "If they don't, they're crazy."

—KK 

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Volume 2 Number 1 (February, 1983)

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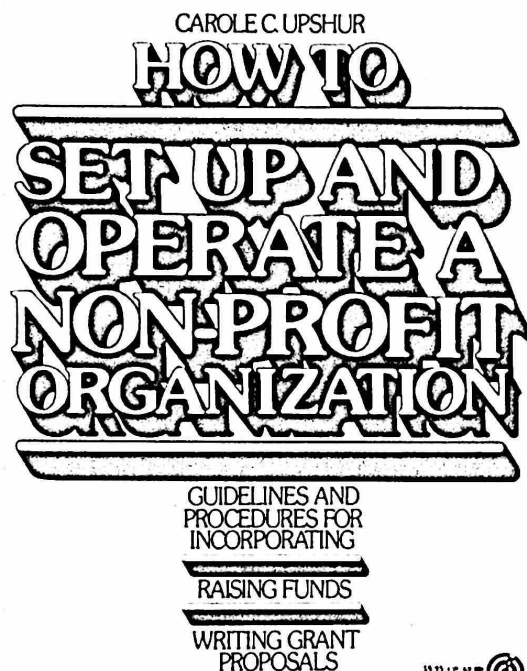
Grammar for Grantseekers; Federated Fundraising: The Issues and a Case Study; Asking Current Donors for Extra Gifts: Why, How, and How Often.

Volume 2 Number 5 (October, 1983)

Prospect Identification; The Cost of People: Evaluating Fundraising Events; Tying Charity's Hands; Tax Strategies for Charitable Giving.

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

Book Review



*How to Set Up and Operate a
Non-Profit Organization*
by Carole C. Upshur,
Prentice Hall, Inc., New Jersey, 1982
252 pp., \$9.95.

How to Set Up and Operate a Non-Profit Organization is one of a dozen new books addressing the major problem faced by non-profit organizations today—fundraising. The book covers a lot of the basics for a group of people considering starting a new organization: how to incorporate, how to develop and research your ideas, how to develop a fundraising strategy, how to raise money from the community, foundations, corporations, and the government and how to write and compile an effective proposal.

The first question that readers of the *Grassroots Fundraising Journal* will ask is whether this book provides new and/or creative ideas that will help them move away from foundation and government grants and towards a broader base of support. The answer is no. Not counting the bibliography and appendices, less than one-sixth of this book addresses the issue of developing non-grant sources of money. These pages do touch on quite a few of the basic grassroots fundraising techniques including membership, individual donations, fees and third-party payments, small

businesses, events canvassing, garage and cake sales, raffles, lunches, dinners, dances, picnics, auctions, ad books, carnivals, concerts, movie premieres, sports events, and direct mail. With approximately twenty-five pages devoted to covering all of these techniques, however, it is not surprising that the treatment is relatively superficial.

However, the author does not claim to have written a comprehensive guide to grassroots fundraising. The book is meant, in the words of the author, "to provide a comprehensive introduction to a large variety of fundraising sources, from grass roots efforts to foundation, corporate and federal grant writing, as well as to tell the reader about the first steps, those of incorporating and obtaining tax-exempt status.


The strongest sections of this book are those about research and grant seeking and management. Approximately three quarters of the book is devoted to these issues. The sections are methodical and provide a lot of how-to's. The chapter entitled "Developing and Researching Your Ideas" explains how to conduct a "needs assessment" and how to do research. For those readers whose strength has never been in surveys and research, the chapter will demystify these tasks in a helpful way. The many chapters on proposal writing are equally thorough, including information on how to research foundation, corporate and government funding sources and how to put together an actual proposal.

The book concludes with close to one hundred pages of bibliography and appendices. The bibliography is fairly extensive as are the appendices. Included are lists of the names, addresses, and bits of information about church related funding sources, regional collections of the foundation center, community foundations, state and regional foundation directories, federal information centers, U.S. Government bookstores, and state property offices. For some, having all of this data compiled in one place will make this book a valuable resource.

Perhaps because the author is an academic with a strong background in grant seeking, the strength of the book are in the sections on research, writing and record-keeping. Some valuable tips are presented on researching and record-keeping. The author covers so thoroughly the arts of proposal writing and government grant seeking that even veteran proposal writers could probably benefit from reading these sections.

The sections on raising money from the community are much weaker. They provide little in the area of how-to, and that which is provided is not really enough to make it possible for a reader to implement any of the ideas. There is only one section in the entire book on Boards of Directors, and nothing on the important role that body can play.

For the fundraiser looking for help with research, documentation, proposal writing and how to get grants, the book will be helpful. For those looking for help with grassroots fundraising, better resources exist.

—LH 

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