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Journal

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In This Issue

Attracting New Members	3
Profile of a Major Donor	9
Tao House Calendar	10
Questionnaire	13
Book Review	14
Subscription Forms	15

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Membership Development: Part 2

Attracting New Members

Introduction

The first article on developing a membership base dealt with some of the initial questions an organization must explore when considering starting a membership program: what is the value of having a membership base; what is the difference between active and inactive members; how can a membership program be an effective fundraising technique; who might be potential members; and how do you attract members. The following article will address these two last questions in greater depth.

For the purposes of this article the issue of membership outreach has been divided into two sections. Section One: Beginning Membership Outreach is addressed to the organizer/fundraiser who has just decided to begin a membership program. It outlines the first steps in attracting members. Section Two: Intermediate Membership Outreach is for the membership developer who has already taken these first steps and is now trying to expand his/her membership base. Both these sections deal with the early stages of membership development, when an organization is still testing the water, determining how lucrative a membership program can be. Usually at this stage, organizations are not willing to invest a lot of money in membership outreach. A future article on Advanced Membership Outreach will explore methods of expanding a membership base that require an investment of a fair amount of money. These methods tend to be advisable only after an organization has determined that developing a membership base is something they want to pursue on a long term basis.

Section One:

Beginning Membership Outreach

You are an organizer or fundraiser who has just determined, along with the rest of your organization's staff and Board of Directors that you want to establish a membership program. You have explored the question of whether you want your members to be active members or primarily inactive donors and have modified your organization's by-laws to reflect your conclusions. You have evaluated your potential audience and determined that there is a large enough universe of individuals who would support your efforts on an annual basis through dues that it is worth the time and effort to establish a membership program. You have decided on a range of contributions for dues that will be affordable to a large number of individuals. You have explored what you can offer these potential members as an incentive to join, and have made a list of benefits that will be provided to members. It is now time to find those potential members.

The first place to look for names of potential members is within your organization. Obviously the people who are most likely to become members are those who are already familiar with your organization and its work. Begin by compiling a list of those individuals who fit that description. Look to former staff, former volunteers, former and current recipients of your services, people who call you for information and advice. Ask your fellow staff members to go through their files and rolodexes and give you a list of people who they are in contact with as a representative of your organization. Ask them to also provide you with a list of their friends who they think would be interested in becoming members. You will probably be amazed at the

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number of names that can be compiled through this process.

Some of the staff and Board members might be reticent to give you names because they are uncomfortable about asking for money and so don't want to put their friends and associates on yet another fundraising list. One way to overcome this problem is to simply state that the organization is about to establish a membership program and you think that the people who have been supportive of or involved with the organization in the past, whether financially or otherwise, should be the first to know about this special program. Explain that by providing you with names, their friends and associates will be among the first to hear about the program, and can certainly decide for themselves whether they want to join.

It is also helpful to make it as easy as possible for Board and Staff to provide you with names. So, rather than just asking them to give you a list, you might provide them with a form to fill in. By creating a form that has a space for all of the kinds of information you want (name, address, zip code and phone number) you will be more likely to get this information. Without such a form, you may find yourself handed lists of names and incomplete addresses which will be very time consuming for you to turn into usable lists.

You are now ready to do your first membership outreach. The easiest way to use this list, and the one most organizers choose, is to do a mailing. Put together a letter explaining that you are establishing a membership program and why. Have it signed by someone whose name will mean something to a large number of people on the list. Be sure to include something in the letter explaining why these people are getting this letter, such as, "You are someone who has supported our organization in the past, and so we wanted you to be among the first to hear about our new membership program."

Enclose in this mailing, a brochure with a membership

form to fill in and a self addressed return envelope. There continues to be great debate over whether it helps to put a stamp on the return envelope. Again, since you are seeking small contributions and have to be very aware of costs, it is probably best to save the money that this stamp would cost you. At some point you might want to test the effectiveness of enclosing a stamped return envelope. Divide your mailing in half, mark the return envelopes that you have stamped so that you can distinguish them when they return from those that you sent without stamps. Check to see for yourself whether stamped return envelopes elicit a greater response. (Be sure, when analysing the results, that there are not other variables, such as the stamped envelopes going to one list or one geographic area and the unstamped ones to another which could explain differences in the level of response.)

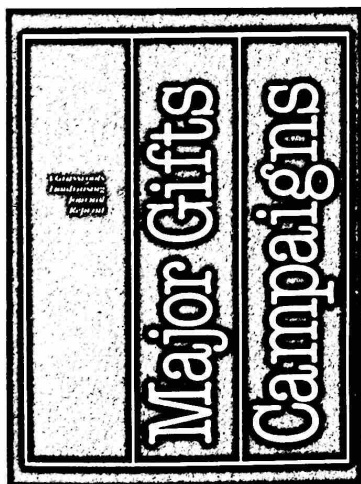
As you go through the process of collecting names of people who are already involved in your organization as recipients of services, volunteers, people calling for information, etc., pay attention to where these names are coming from. Now is the time to begin to establish a system for collecting these names on an ongoing basis. For example, if staff members are frequently providing assistance to people over the phone, develop a form for them to use so that whenever they speak with someone who they think ought to become a member, they can fill in the form with the person's name and address. You can try to encourage fellow staffmembers to send out membership brochures whenever they are in contact with someone they think is a potential member. But it is more likely that the brochure will get sent out if you do it yourself. If you have a receptionist handling all incoming calls for general information, be sure that person has a form so that they can ask all callers if they would like to receive a brochure about your organization. Collect these forms on a weekly or monthly basis, and send all the people on them a letter telling them that yours is a membership organization and it depends on the support of individuals such as themselves, and encourage them to join. Enclose a membership brochure and return envelope. Many organizations fail to establish this kind of system and the result is that the names of people who are potential members get lost and can never be used.

Having established that those who are already in contact with your organization for reasons other than contributing money, are very likely to become members if offered the opportunity, look at the ways that your organization is in contact with groups of individuals. Does the staff go out and speak at meetings of other organizations? If so, get the staff into the habit of taking along membership brochures and including in their remarks, whenever appropriate, some comments about the fact that yours is a membership organization and have them distribute membership brochures. Do you sponsor educational programs periodi-

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cally? You might include in the promotional materials about these programs that you depend on your members for support and include a membership brochure in mailings for these programs. Some organizations include in their fees for programs, a membership contribution, so that anyone who attends, becomes a member.

During these early stages of outreach you will find that seeing your organization as a membership organization provides an entirely new perspective to all of your activities. You may find that while the staff and Board were eager to establish a membership in theory, they are not as eager to actively promote the idea of joining. It will take some time, and possibly some special training to get everyone into the habit of talking publicly about your membership program. You, as the coordinator will have to constantly remind people to encourage those they are in contact with to join. You will also have to constantly remind everyone in the organization that you alone cannot build a membership base. The more you promote the idea of attracting members as a group activity rather than your own special project, the more involved everyone will get. To that end, be sure to report regularly to the staff and board about the results of their efforts. If they give you names and never hear that their efforts resulted in any new members, they will not feel compelled to continue to provide names. If however, they hear that what they did resulted in actual new members, they will feel more involved and will be more likely to promote the membership on an ongoing basis. They might even begin to recognize on their own, sources of names of potential members, that you did not think of.

Section Two:

Intermediate Membership Outreach

Now that you have completed your first big push for membership, it is time to look seriously at some ongoing methods of attracting members. Obtaining lists is one of the more important parts of membership outreach to look at. There are two ways to obtain lists. One is to create them, the other is to rent, trade or borrow them.

During your initial efforts you will have already established systems for collecting the names of people who are coming in contact with your organization. The reason to collect names is obviously to create lists for membership outreach. At this stage it is important to take a look at all of your organization's activities from the perspective of creating lists to see if you have overlooked some natural sources of names.

Are there services that you provide to the public which might also provide you with names for membership outreach? Does your organization market any materials such as publications? If so, everyone who buys a publication should be put on a list for a future membership mailing. Do you sponsor events where it is inappropriate to promote your membership? Are these events that might at least provide you with a list of attendees? Because the key to membership outreach is collecting lists of names, look at everything your organization does to see if there are lists that could come out of that activity. Do you have information tables at events? This is a place to have a sign-up list.

There are a few tips for creating lists for membership outreach. One is that if you ask people if they would like to put their name on a list to get a membership brochure they will probably not be too interested because they will see that as putting their name on a fundraising list. But, if you ask them if they would like to be on your mailing list, they will be more likely to sign up. Some organizations even

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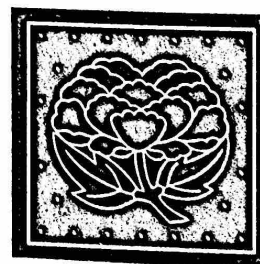
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create postcards that read, "Please add my name to your mailing list" and provide a space for names and addresses, and hand these cards out at events.

Another place to look for names is at your other fundraising activities. Are there people who are making contributions who are not members? If you have a fundraising event, all the people who come should be put on a list and sent a membership mailing 3-6 months after the event. Raffles are also an excellent source of names of potential members.

Another way to create lists for membership outreach is to ask those who have already become members to provide you with names of others who they think would join. As you did with your staff and Board of Directors, ask all those who are already members to give you a list of their friends and colleagues. One of the most effective ways to do this is to send a letter to all of your members asking them to provide you with ten names. Enclose a form in the mailing to make it an easier task to fulfill.

In addition to looking at your own organization's access to names for lists, now is the time to begin looking to other organizations for names of potential members. Since lists are the nuts and bolts of all fundraising activities, not all organizations are going to be willing to part with their own lists. However, many groups have come to the realization that trading lists can benefit everyone.

The list trading/renting business is one that has grown very rapidly. Large organizations tend to depend on the use of other organizations' lists as their primary form of membership development. Frequently, they rely on direct mail to very large lists which they obtain through renting or trading with other organizations. These mailings usually consist of several tens of thousands of pieces. Because of their size and the amount of money and time needed to effectively run a large direct mail campaign, most organizations cannot afford to engage in this massive form of membership recruitment. If, at this stage, you think it is worth considering for your organization, talk to organizations who are already involved in direct mail to find out how much money it is costing them, what kinds of returns they are getting, and to discuss the advantages of running the mailings in-house or using an outside consultant. Because of the complex nature of direct mail, it is a topic that will be dealt with in a future article on soliciting contributions from individuals.

The concept upon which direct mail is based, however, is worth looking at for organizations in the early stages of membership development. The idea is that individuals who have supported organizations or causes similar to yours are *very* likely to join your organization as well. The more similar to your organization another organization or cause is, the more likely their supporters will be to support you.

If your group is working with or is familiar with other

organizations with whom you share common goals, you should begin to inquire about the possibility of gaining access to their lists. Some organizations might be generous enough to simply give you their mailing lists or membership lists to use in a one-time mailing. Many, however, will want to get something in return. With these organizations, you will need to explore list trading or renting.

Since you have already begun a membership, you have a list of people which you can use for trading. You will find that many organizations are interested in exchanging lists so that you can mail to their members and they can mail to yours. Usually, exchanges are made on a one-for-one basis. This means that if you have a list of 200 names, you can ask another organization to exchange 200 of their names for 200 of yours.

Because the list exchange business has grown so large, many individuals are beginning to resent their names being given out to many different organizations and then being the recipients of lots of "junk mail." A principled way to handle this issue is to send your members a mailing before you exchange any lists. Provide them with a card that they can send back asking that their name and address not be given out to any other organization. You can then eliminate the names of those who return the card and assume that anyone who does not return it does not mind their name being traded around.

If an organization is not willing to trade their list, or you do not have enough names to merit trading, you might inquire about the possibility of renting lists for membership outreach. Again, select the organizations whose work

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Record keeping is extremely important.

is very similar to yours, as their lists are likely to generate the best returns. Keep in mind, however, that organizations who have gotten to the stage of seeing their lists as an asset to be rented for profit are probably allowing their lists to be used by many different organizations. Therefore, the people on those lists are getting a larger number of requests, and the likelihood that they will respond to yours is significantly diminished.

When mailing to lists of members or supporters of other organizations, you must make every effort to create an appeal that will attract their attention. The letter that you use to people who attend your events may not be right for these mailings. Don't be afraid to try out different letters to different organizations. Pay attention to who is signing your appeal. If you are mailing to the list of another organization with whom you have worked closely, ask the director if she or he will sign your appeal. Then draft a letter for that person that explains why she or he is asking her/his organization's supporters to support your organization as well.

When you are mailing to a variety of lists, you will find that record keeping is extremely important. In order to evaluate the results of each mailing, you must be able to identify each piece of return mail according to which list generated it. Code your mail before it goes out, with either a mark or a number or a letter, to indicate each different list. Be sure to keep careful track of your coding system.

Many organizations are surprised by the returns they get from these kinds of mailings in that they expect about 50% response and only get 10%. 10% is a very good rate of return. Anything above 10% is excellent. 5-10% is still very good. 2-5% is average. Anything below 2% is not good for these kinds of mailings. (These percentages come from years of experience with mailings and lengthy discussions with experts in the direct mail business.)

In addition to keeping track of returns, it is important to keep track of your expenses related to these mailings. By comparing your expenses to your returns you will be able to determine whether each mailing broke-even, generated a profit, or resulted in a loss.

It is important to note that while the bulk of membership outreach is done through the mail, there are other methods of reaching individuals to encourage them to become members that should not be ignored.

If your organization's staff does public speaking you have probably already encouraged them to mention your membership program and distribute brochures. Some organizations also use their membership campaign to promote their public speaking program. You might try to expand your public speaking program to let other groups of people know that they can support your work by becoming members. Events have already been mentioned as a place to find potential members. If your organization does not already do so, now may be the time to explore the possibility of creating or sponsoring public events that will introduce new people to your organization who can be encouraged to join as members. Some such events are educational programs, film screenings, lecture series, and open houses.

There are many other methods of recruiting members which have not been discussed in this article, such as large events, canvassing, phonathons, and use of direct mail, all of which require a large investment of staff time and money to be done effectively. Before investing your resources in these kinds of activities, it is important to engage in a thorough evaluation of your membership program to date. You may find that, at the end of a year of trying to attract members, you are spending a lot more time and money than the results merit. Not every organization is one that can attract members, and you may find that yours is one that cannot. This does not mean that you should stop pursuing small contributions from individuals. However, membership may not be the method to use.

The next article on membership will discuss how to keep records in a way that they are useful both for ongoing membership development and ongoing evaluation of your membership program. LH

Don't be afraid to try out different letters to different organizations.

The donor interviewed for this profile lives on the West Coast in a major metropolitan area. She holds an MBA degree and is a Certified Financial Planner. She has her own firm with three "associates" which mainly works with women helping them to budget, invest, and set appropriate financial goals.

She is nearly 40, and earns around \$45,000 a year. She inherited \$200,000 when she was 31 and has invested that and parlayed the capital into about \$350,000.

She is a strong supporter for what she calls "the whole non-profit sector." She gives 10% of her gross income (\$4,500) and \$10,000 from the interest off her inheritance every year. She sits on two Boards, one a major national health organization, and the other a community arts group. She is divorced and raising 2 children, ages 10 and 8.

She only gives when she is asked directly by phone or in person by someone she either knows or by someone who has some connection with her. She never responds to direct mail and rarely goes to special events. Her minimum gift is \$100. She wants to give gifts of a size to make some impact on the group, and believes that gifts of \$15-50 are of negligible value.

Her first question on being approached for a gift is, "Do all your Board members give money?" She says, "If the

Profile Of A Major Donor


answer is anything less than an unqualified 'yes,' I say no to the request." Giving time, or giving donations of skills or even things doesn't count for her. "Only actual money gifts from all Board members to the group—regardless of anything else they might give will get a money gift from me." When asked if the economic profile of the Board made a difference, she said, "No. I realize that if you have a Board with poor people on it, their gifts are not going to be substantial. I don't care about the size of the gift only that they give. \$1.00 would be enough. 25¢ would be enough. I want 100% giving."

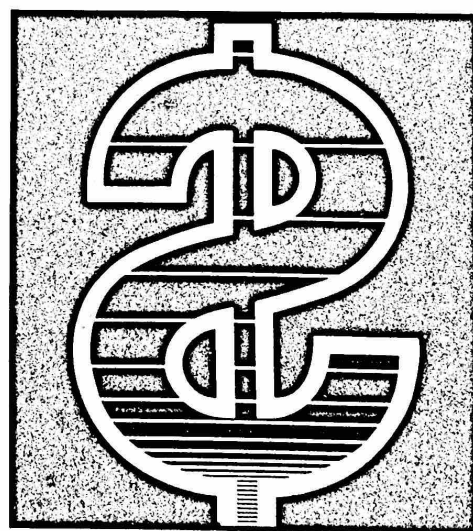
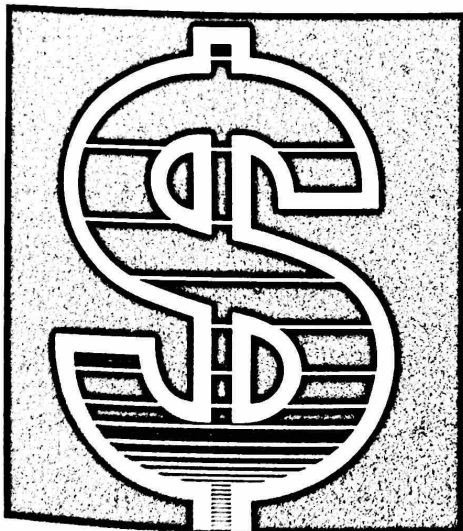
She supports a wide variety of groups. Included in her spectrum are two church missions which are both schools operated by Methodist churches in foreign countries, 3 women's health organizations, 3 of the largest museums in the United States, local family planning agencies, 4 environmental groups, two local repertory theatres, a residential treatment center for disturbed adolescents, and a local anti-nuclear group. What all these groups have in common, she explained, is well run Boards, track re-

cords of success, and evidence that money is carefully spent. In addition, someone from each of these groups personally asked her. Her largest gifts, \$2500 each, go to the organizations on whose Board she serves.

She has three pet peeves about the ways many organizations do fundraising. 1. The solicitor of the gift will not actually ask for the gift, but hints that a gift is desired. "Give me honesty," she says. 2. The organization does not have a financial plan, has not set goals for fundraising, and has no long range plan. 3. The organization does not write her a thank you note within a week.

She is most likely to repeat or upgrade her gift to organizations which send her thank you notes promptly. The thank you notes should be personal and signed by someone. In addition, she wants a copy of the organization's Annual Report accompanied by a personal note (even if the note is as brief as, "Hope you are having a nice summer."), and organizations which ask her to repeat the gift must use a personal letter and follow-up phone call.

This donor illustrates a phenomenon which is increasingly common: giving to organizations less because of what they do or what they stand for, and more because of how well they are run. She also underscores the need donors have to be cultivated, sought out, and asked honestly and straightforwardly. 



Tao House Calendar

by Laurel Zien

Note from the Editor:

Many readers have inquired about selling products as a fundraising strategy. For groups who have products related to their work, such as educational materials, bumper stickers, t-shirts, or art work, products can be a steady source of income. However, products rarely generate large amounts of income and they require a significant investment of time and resources to handle the marketing, advertising, responding to orders and keeping an inventory.

The following article describes one organization's venture into the field of product sales, and their mixed success with it.

Early in 1983, two past presidents of the Eugene O'Neill Foundation, Tao House, were discussing possible fundraising projects that would bring the existence of Tao House and the Foundation to the attention of a wider audience. The only national park for the performing arts in the West, the Eugene O'Neill National Historic Site in Danville, California, is unique in ways far beyond its goal to honor America's only Nobel Laureate in playwrighting. Tao House is the home where the masterpieces *Long Day's Journey Into Night*, *The Iceman Cometh*, *A Touch of the Poet*, *A Moon for the Misbegotten*, and *Hughie* were written. Plans for the wilderness site include residential workspace for performing artists, a conference center and a unique theatrical library, in addition to tours of the restored home. Clearly, a unique fundraising tool was called for.

At that time, the Foundation had recently acquired a copy of the diaries of Carlotta Monterey O'Neill, O'Neill's

third wife (and the person responsible for the construction of Tao House and, some say, the creation of the Tao House Plays), and had earlier obtained copies of O'Neill's work journals. Never before published, these private papers, along with accompanying photographs, became the core of the proposal to produce **The Years at Tao House**, the 1984 fine quality calendar published by the Foundation in 1983.

A fine art calendar is a costly venture to produce. Several major donors were approached by Board members relative to possible underwriting and receiving credit for such a project. \$2,000 was raised in this fashion. 1000 calendars were printed at a cost of approximately \$5.40 each.

The calendar was of extremely high quality, it was unique, and it showed a side of the O'Neill's life that had never before been available to the public. It was marketed in several ways. First, the Foundation Auxiliaries sold copies to their members and friends. Second, reviews were solicited from book reviewers. Due to popular and unanimous acclaim, orders flooded in. Third, while several bookstores had been approached, only one agreed to sell the calendars without commission (it was feared that to exceed the \$10 cover price would be poor public relations). Fourth, advertisements were placed in *Atlantic Monthly*, and the *Los Angeles Times*. Fifth, a glossy postcard calendar announcement, featuring a photograph of O'Neill at Tao House was sent to the Foundation's mailing list of approximately 1500 names. Approximately 300 calendars were extended as public relations gestures. 500 were sold, and the Foundation netted approximately \$1,600 on their first publishing venture. If you called this beginners' luck, you'd be absolutely correct.

Heady from their success, the Board of Director, and their small editorial committee of two, proceeded to develop ideas for the 1985 calendar. This was no small task.

Sample Calendar Order Forms

1985 O'NEILL CALENDAR TO CELEBRATE FOUNDATION'S TENTH ANNIVERSARY

Our 1985 Tao House calendar will celebrate ten years of the Foundation's existence. The history of how Tao House was saved for future generations is long and tortuous. The calendar will provide a detailed, accurate history for our members, auxiliaries, and the general public. It can be referred to for years to come for factual information about the project. It will be exciting, too. Pictures of past special events: HUGHIE, THE HAIRY APE, and A MOON FOR THE MISBEGOTTEN will be included along with some historic 'surprise' pictures. Darlene Blair is hard at work ploughing through mountains of clippings, photographs, minutes and personal recollections in order to produce our second successful calendar.

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The editorial efforts of the first calendar took these two dedicated women over 40 hours per week for the better part of five months. The subject for the 1985 calendar was at first undecided, but as the Foundation had been planning to produce a 10th Anniversary memorial book, this seemed like a natural opportunity to combine two pieces in one.

About nine months of painstaking research resulted in an historic preservationist's masterpiece. **The Eugene O'Neill Foundation, 1974-1984** (as the 1985 calendar is titled), is the chronicle of the efforts of a public spirited group of citizens, of their desire to rescue a precious remnant of our cultural past and not only preserve it, but to establish it as a National Historic Site and a national park for the performing arts in the bargain. This document, quite properly, provides a model for preservationists in all areas of our country. The 1985 Calendar, like its predecessor, shows unusual and rare photographs of such notables as Jason Robards and Helen Hayes, two of the Foundation's Honorary Members. It has not slipped a mote in quality.

Funding for the 1985 calendar was provided in part by 21 local businesses (solicited in a major campaign which contacted over 150 specially targeted firms), who sponsored the piece at \$100 each. Based on the success of 1984's calendar and on the belief that the historic information contained therein would be of value in many uses,

1200 calendars were ordered. The cost for this calendar went up this year to \$6,800, not only due to the addition of eight pages, but also to many last minute editorial content changes. It was determined to keep the price at \$10: 470 calendars needed to be sold to break even.

Marketing efforts were not improved over the previous year: the paid ads were dropped as it appeared they had drawn few, if any, orders. However, the Foundation's newsletter, published in late summer, contained an order coupon which brought a steady, and early flurry of orders.

And now for the bad news. Unlike its predecessor, the 1985 calendar has not sold at all well, revenues as of the end of December showing a loss on the project of approximately \$2,490 (on a sale of 210 calendars). Perhaps this edition relies too heavily on the Foundation history, and not enough on O'Neill. Perhaps the Foundation needed, in the second year, to anticipate that less than one-half of the previous year's purchasers would return, and make a more concerted effort to move beyond this small circle of devotees.

It should also be noted that local competition increased this year. The Town of Danville, celebrating its 125th anniversary, has just published a \$25 fine quality book of local history and photographs, and the San Ramon Valley Kiwanis published a calendar of its own. These have undoubtedly cut into the Foundation's market, but certainly support the validity of the concept.

Due to the potential financial loss this year, the editorial content of the 1986 calendar is being carefully studied. Also being noted is the need for complete underwriting of this project in the future. Additional recommendations include: marketing efforts planned by a separate committee whose work would be facilitated by an early publication date. This would possibly allow for distribution through small press/calendar distributors.

Why continue with this venture? The public relations

The
public relations value
of the Tao House
calendar cannot be
underestimated.

value of the Tao House calendar cannot be underestimated. Unlike many major businesses in our area that easily become a part of the community, the O'Neill Foundation, due to current restrictions on access to Tao House, remains somewhat isolated. In addition, most area residents, while perhaps aware of our existence, have not seen the House or the results of any of the Foundation's efforts. The calendars, especially when sponsored by local businesses, allow the community to feel a part of our efforts—they can see and "buy into" this cultural resource by purchasing a share in one of our projects. The calendars also remind local and national politicians of the value of the project to the community, and the need for continuing support not only for Tao House, but for all of the performing arts. Calendars displayed in local libraries remind residents of the great works of dramatic literature that were written in our midst, and perhaps will encourage them to support the Foundation or other theatrical ventures.

The Tao House Calendar wins the admiration and support of all who see it. Kudos have come from a wide

variety of sources, and provide the encouragement to continue with this publication effort. Here is a sample:

"Thank you for the handsome calendar. I want to order more..." Helen Hayes, Honorary Member.

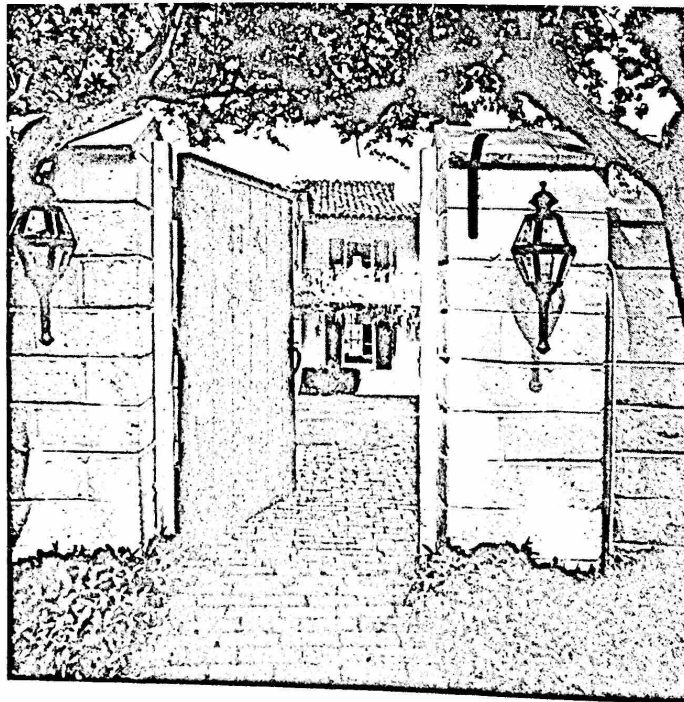
"It's an excellent work of O'Neill memorabilia, done with impeccable taste." Louis Sheaffer, author of the Pulitzer Prize winning "O'Neill, Son and Artist."

"I can attest personally to its beauty and assure potential purchasers that it will be cherished long after its 365 days on the wall have passed...its only flaw is quality: though space is provided, I couldn't imagine defacing it with ephemeral scribbles of my own! This one, like the writer it celebrates, is for the ages." Frederick Wilkins, Editor, Eugene O'Neill Society Newsletter, an organization of scholars from around the world. ■

Laurel Zien is an arts management consultant, writer and instructor. She served for six months as Planning Consultant for the Eugene O'Neill Foundation, Tao House, before being hired as the Foundation's first Executive Director in September of 1983.

EUGENE O'NEILL

The Years at Tao House



1984 Calendar

Important Questionnaire

please fill in

In the December, 1984 issue of the *Grassroots Fundraising Journal*, we published an article on fundraising during an election year. Many readers have been asking whether we know how other organizations were affected by the 1984 elections. As a result, we have developed the following questionnaire to assess the actual impact of the '84 elections on various organizations' fundraising efforts. We encourage you to fill it out and send it in as soon as possible. The results will be compiled, analysed and reported in the June issue of the *Journal*.

Name (optional) _____

Organization (optional) _____

Location: City _____ State _____

What is the geographic focus of your organization's work?
 urban rural neighborhood state nation

Briefly describe what your organization does:

Annual Budget 1983 \$ _____ 1984 \$ _____

Results of Fundraising Efforts 1983

Source of Revenue	Budgeted	Actually Raised

Total: _____

1984

Source of Revenue	Budgeted	Actually Raised

Total: _____

Did you have an end-of-year fundraising campaign in 1984?

yes no

What kind of campaign was it?

Special Event Major Gifts Other _____

What was its goal? \$ _____

How much was raised? \$ _____

(please use gross figures)

If you had the same campaign in 1983, what were the results?

Goal \$ _____ Actually raised \$ _____

Do you have a membership program? yes no

If yes, what were its goals? 1983 \$ _____ 1984 \$ _____

How much was raised? 1983 \$ _____ 1984 \$ _____

How many new members joined? 1983 _____

1984 _____

Do you believe the '84 elections had on an impact on your fundraising efforts? yes no

If yes, the impact was positive negative

Please describe the impact:

Thank you for taking the time to fill in this questionnaire. All of the information you have provided will remain completely confidential. Please send completed questionnaires to: **Grassroots Fundraising Journal**; PO Box 14754; San Francisco, CA 94114.

Book Review

The National Bestseller 

GETTING TO YES

Negotiating Agreement
Without Giving In

Roger Fisher and William Ury
Of the Harvard Negotiation Project

Getting to Yes: Negotiating Agreement Without Giving In.

by Roger Fisher and William Ury.
Penguin Books, 1983. 161 pp.

Getting to Yes is a book about negotiating. Its premise is that the standard methods of negotiating tend to leave all parties dissatisfied, worn out or alienated but that there is an alternative. This alternative is known as principled negotiation.

What is principled negotiation and why is a book about it being reviewed in a fundraising journal?

Principled negotiation is a method of negotiation that sees everyone involved as problem solvers working together, looking for mutual gains, discussing merits, looking at options, focusing on each party's interests rather than their positions. It avoids trickery, establishing bottom lines, making threats, or applying pressure. It is an honest, non-antagonistic method of resolving differences and it is in keeping with the principles of most social change organizations.

Getting to Yes was produced by the Harvard Negotiation Project. Inspired

by the question, "What is the best way for people to deal with their differences?" the authors drew on their backgrounds in international law and anthropology and an extensive collaboration with practitioners, colleagues and students. The result was a practical method of negotiating agreement amicably without giving in.

The authors of this book have been working together for four years. Roger Fisher teaches negotiation at Harvard Law School and is the Director of the Harvard Negotiation Project. He has also practiced law in Washington and served as a consultant to the Department of Defense.

William Ury is the Associate Director of the Harvard Negotiation Project. He has served as a third party in disputes ranging from landlord-tenant grievances to labor-management conflict at a Kentucky coal mine.


The methods described in the book are based on four points: separate the people from the problem; focus on interests, not positions; generate a variety of possibilities before deciding what to do; and insist that the result be based on some objective standards. One section includes a chapter devoted to each of these points describing how, when applied, this form of negotiating obtains different results from standard negotiating tactics. Another section, for the skeptics labeled "Yes, but..." answers common questions about the method.

Principled negotiation is a methodology that can be used by social change organizations in many facets of their work. For example, drawing on its principles, *Getting to Yes* suggests ways to approach some of the common reservations expressed by fundraisers. One such reservation is that often people seeking contributions feel that they are "using" their friendships, and that as a result, some relationships that they care about might be destroyed. The authors of *Getting to Yes* see this as a problem that exists for everyone engaged in negotiation in that they are interested both in the substance of the problem being resolved and in maintaining a

relationship with the "other side." Their solution is to separate the people from the problem. Among the suggestions they make to accomplish this are: understand the other side's thinking, don't deduce their intentions from your fears, discuss the other side's perceptions and make your proposals consistent with their values.

Applied to a fundraising situation, the above suggestions might be translated into: put yourself in the donor's shoes. What would you want to hear to be convinced to make a contribution? Don't mistranslate what are legitimate questions into attempts to say no. Take everything the donor says at face value. If you are afraid that the donor will feel that you are using their friendship to get something, discuss that fear openly so that it does not interfere with a discussion about the merits of your organization and why it deserves to be supported. Finally, ask for what is reasonable for that donor to give and phrase your request in a way that addresses their interests as well as yours.

This is simply one example of how principled negotiation can be applied to fundraising and to the work of social change organizations. The methodology will be equally if not more useful in attempting to resolve differences within the organization, such as those between staff members or between staff and board members, or in trying to achieve the very changes that your organization is seeking in the community. In the words of the authors, it "shows you how to obtain what you are entitled to and still be decent."

What is special about this book is that it is not just theoretical. All of the examples are realistic, and it is written in a way that any reader can see how the methodology can be applied to their own every day interactions. In addition, a noticeable attempt has been made to use non-sexist language. For anyone who finds the process of resolving differences uncomfortable this book will be very helpful. For activists in social change work, it is highly recommended. 

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