

Grassroots

Fundraising

Journal

Volume 4

Number 2

April 1985

\$3.50

Advertisement

# We've Seen The Future --- AND IT WORKS

- In addition—
- We examine the major issues of concern to people and organizations working for a better future.
  - We interview the individuals who are leading the battles.
  - And we tell you "how to"—get a job, get involved, or make your organization more effective.

To find a job with a future, look into *Community Jobs*. Every year we list over 2,000 new jobs in community work nationwide.

Jobs in the environment, education, health care, housing, the media, and more.

**NO-RISK GUARANTEE!** If for any reason you want to cancel your one-year (10 issues) subscription, you'll get a full refund on unmailed issues.

- |                                  |                                  |                                  |  |
|----------------------------------|----------------------------------|----------------------------------|--|
| <input type="checkbox"/> \$12.00 | <input type="checkbox"/> \$15.00 | <input type="checkbox"/> \$24.00 | <input type="checkbox"/> Payment enclosed. |
| Individual                       | Nonprofit                        | Library or                       | <input type="checkbox"/> Please bill me.   |
| <b>40% off the</b>               | Organization                     | Institution                      | <input type="checkbox"/> I've enclosed an  |
| <b>cover price</b>               |                                  |                                  | extra \$10 for first                       |
|                                  |                                  |                                  | class delivery.                            |

NAME \_\_\_\_\_  
ADDRESS \_\_\_\_\_  
CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_



1520 16th St. NW, Suite GFJ  
Washington, DC 20036

**Now Available!**

**KIM KLEIN'S**

**GRASSROOTS**

**FUNDRAISING**

**TRAINING**

**ON VIDEOTAPE**

Kim Klein has just completed a series of five videotapes covering the basics of grassroots fundraising. Thorough but concise, the tapes provide complete training in basic fundraising techniques in one- to two-hour formats. Singly, any tape can be used to teach one facet of fundraising. Together, the five tapes make a complete, one-day training seminar, including practice exercises.

For information about ordering, write:  
Kim Klein, PO Box 640, Inverness, CA 94937

## In This Issue

- The Lord Loveth a Cheerful Giver 3  
The Membership Brochure 10  
Questionnaire 14  
Subscription Forms 15

The *Grassroots Fundraising Journal* is published six times a year: February, April, June, August, October, and December. It is published in San Francisco, California.  
ISSN No. 0740-4832.

**Publishers and Editors:** Kim Klein and Lisa Honig

**Contributors to this issue:**  
Lisa Honig and Kim Klein

© 1985. Please request permission of the *Grassroots Fundraising Journal* to reprint or use this material, except as quotes or part of a review.

**Typesetting:** Access Typography **Design:** Michael Cox

Address all inquiries to: P.O. Box 14754, SF, CA 94114;  
or call 415 669-1118

## Advertising Rates

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

**Classified:**

\$.50 a word, minimum 10 words

**Display:**

(width precedes depth)

1/8 page, 3 1/2" x 2 1/4" \$ 25      1/2 page, 3 3/8" x 9" \$100

1/4 page, 3 3/8" x 4 1/2" \$ 50      1/2 page, 7 1/4" x 5" \$100

Full page, 7 1/2" x 9 3/4" \$200

Ads must be received one month prior to publication.  
Camera ready copy only.

**Deadlines:**

February issue: January 1

April issue: March 1

June issue: May 1

August issue: July 1

October issue: September 1

December issue: November 1

Full payment must accompany ad, unless other arrangements are made in advance.

# The Lord Loveth A Cheerful Giver

*Don't We All!*

*This article first appeared in Vol. 1, No. 3 of the Grassroots Fundraising Journal. It is being reprinted due to popular demand.*

One of the many ways churches and synagogues have helped their congregants give as much as they can, and give cheerfully, is through the custom of the *tithe*—a tradition of giving 10% of all that one has or earns to the church, synagogue, or other place of worship. There are numerous references to tithing in both the Old and New Testaments, and the word “tithe” is usually synonymous with the figure 10%.

In modern times, although churches and synagogues have reinterpreted and changed the emphasis they place on tithing, it remains an essential part of a religious person's life. In some Christian traditions, such as those of Mormons and Seventh Day Adventists, the 10% tithe is taken as seriously as a debt owed to a bank. Others interpret the tithe to mean giving 5% to a church and 5% to other charities. For most religious people, an exact 10% is not strictly calculated, but is taken as a symbol that people are to give generously to both place of worship and other charities.

However the tithe, or in more secular terms, the pledge, is interpreted, it is a very effective way to raise money, and is one that grassroots groups have too often overlooked. Some groups do not like the association of pledging with religious tradition, and others see pledging as too much paper work.

In hard economic times, or among constituencies which have little money, the pledge deserves a second look.

There are obvious advantages to an organization in having a pledge program. People can give more by spreading out their payments than they can give at once, and a sizeable pledge program can provide an organization with a reliable monthly income.

But there are also advantages for the donor. Pledging is

like paying on an installment plan, allowing people to buy things (or in this case, give money) they could not afford if they had to pay it all at once. For people who are committed to an organization, and would like to give more, pledging allows them to do so. Many people have \$5 a month who could not give \$60 a year if they had to give it in one lump sum. Even people who can afford a larger gift, say \$50, \$100, or \$250, can be encouraged to give still more by asking them to give that much, not annually, but quarterly or monthly. People often voice the sentiment that they would like to give more, but they can't afford it. Pledging allows them to have their wish to give more without adding undue hardship to their budgets in one given month.

## ***Start a Pledge Program With the Board***

The idea of pledging will be most appealing to people who are the most committed to your organization—those people giving already: volunteers, staff and Board. (For the purpose of this article, “Board” will mean whoever is the decision-making body of your organization, be it collective, a steering committee, an elected body of representatives, etc.) These people, who are morally, legally, and financially responsible for the organization should be the most committed to it, and can be most easily persuaded to pledge. Staff (paid and unpaid), members, and current donors should be given the option next.

## ***The Elements of a Pledge Program***

In general, a pledge program should be undertaken by organizations which already have a strong individual donor program, in whatever form—membership, subscribers,

**Illustration One***A Sample Pledge Letter for a Direct Service Agency*

Dear Member,

You have helped us repeatedly in the past whenever the going's been tough, and this has meant a lot to us. That is why I want you to consider becoming a member of *Giving Associates*, and help our work in an ongoing way.

A *Giving Associate* is simply one who pledges to give a monthly gift to help support our work with those in need. He or she provides hope and inspiration to:

- ...those overcoming alcohol problems,
- ...those who are forgotten in nursing homes,
- ...those who suffer acute emotional problems.

As a *Giving Associate* you will receive special benefits, such as:

1. An attractive certificate of membership.
2. A free copy of our latest publication.
3. A monthly postpaid return envelope for your contribution.

Remember, there is no specific monthly sum you must contribute. Each *Giving Associate* is asked to pledge an amount that can be comfortably given on a continuing basis.

**Comment:**  
*Remind the donor of his/her commitment.*

*Now you are inviting them to do something special. Remind the donor of the scope of your work. \$10 a month for all this seems like a small amount.*

*Spell out what's in it for the donor.*

*Use adjectives: attractive, convenient, free, etc.*

*Make it sound easy and simple. Anyone can participate. This is not something just for the rich.*

"friends of," etc. To encourage people to pledge, you may wish to add to existing benefits donors receive (such as newsletters, membership cards, T-shirts, etc.) a benefit available only to people giving \$50 or more, or available only to people who pledge. This added incentive will make a difference for many people, both in deciding to pledge at all, and in raising the amount of their pledge. Many organizations give a special name to people who pledge, so that they belong to the "gift of the month club", "donor club", "sustainer club", or are "sponsors", or "friends of" the organization. These clubs or designations have special benefits all their own. It is not necessary to create a donor club, nor to have a special name for your donors. Each organization will want to decide what is in keeping with their image and mission, and what would appeal to their supporters.

### **Seeking Pledges Through the Mail**

There are a variety of ways to introduce the idea of pledging to your donors. Probably the best way is to send a special mailing asking current donors to pledge. This letter would explain that the reader is a valuable supporter, and your organization wants to give him/her an opportunity to give as much as possible. Also, your organization would like to depend on a regular monthly income, and the donor will get certain benefits. (*Sample*

*letters in Illustration One and Two.*)

In addition, the option of pledging should be included in all your fundraising mailings. Though few people will pledge as their first gift, the one or two who do will make it worth it. The idea of pledging sometimes takes awhile to "catch on" in an organization; if donors, members, and volunteers see the word in many different places, they may finally decide to pledge.

Many effective pledge letters specify what the pledge will be used for. The most familiar of these are ones that say, "Twenty dollars a month will feed, house and clothe a child in Bangladesh" or "Five dollars a month will insure good homes for three orphan dogs left at our shelter."

For organizations providing direct service, translate services into terms like these. For example, a shelter for battered women might say, "Our food bill is \$300 a month. We are looking for twenty people to pledge \$15 per month to pay this bill, and would like to invite you to be one of those people. As a member of the Twenty Club, you receive..."

Organizations providing advocacy, litigation, education or other indirect services will need to be more creative, but as the example from Amnesty International shows, it is still quite possible to be specific in your pledge request (*see Illustration Three*). Notice how Amnesty International has taken a major part of their work, which is their research effort, and translated it into a pledge amount—

## *Two unique collections of Journal articles*

### ***The Board of Directors***

*Our best articles on one of the most basic issues facing community organizations today: how to develop a Board of Directors who are willing & able to raise money. 16 pp.  
Cost: \$6 (Postage & handling included).*



### ***Major Gifts Campaigns***

*From getting over your fears, to the letter, phone call, & meeting itself—these articles tell you what you need to know to put together a campaign to solicit large contributions from individuals. 20 pp.  
Cost: \$7 (postage & handling included).*

Order Form

Quantity Total

<i>The Board of Directors</i>		
<i>Major Gifts Campaigns</i>		

Total Amount Enclosed \_\_\_\_\_

Send to:

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_ Zip \_\_\_\_\_

Send check or money order to Grassroots Fundraising Journal, P.O. Box 14754, San Francisco, CA 94114.

## Illustration Two

### A Sample Political Action Appeal

Dear Concerned Citizen,

When I wrote to you nearly a year ago and invited you to join me in sponsoring political action, I was troubled by America's turn to the right.

Fortunately you and more than 200 other concerned citizens here in Sample County shared my sense of frustration.

Together we formed an effective response, which has already had an impact in the following ways:

...sample impact      ...sample impact

Now that it is time for you to renew your support, I want you to consider our future plans.

Plan A...                  Plan B...                  Plan C...

You and I simply cannot afford to let up in our efforts now. I can assure you that with your continued help, we will intensify our campaign, and expand our work.

That's why I hope you'll take a few minutes now to fill out and return the enclosed form.

If we are to provide the critical support needed, it's crucial that we know just how much money we can count on each and every month.

For this reason, I am asking you to commit yourself to a monthly pledge from now until our petition is on the ballot. If you will commit yourself to a small monthly contribution of \$10, \$15, or \$20 each month, we will be assured of victory.

As a way of saying "thank you" for your generous commitment, we will send you a beautiful paper-weight as a tribute to you and all the citizens working so hard and giving so much.

Please let me know I can again count on you by returning your renewal contribution in the enclosed envelope.

Sincerely,

#### Comment:

*Remind the donor of his/her previous commitment. The donor is not alone, but is part of a large number of concerned people.*

*Spell out accomplishments. The message is: your donation went a long way and was well used.*

*Now your money can do this, this and this. The organization is not resting on its laurels. The author of this letter is making a commitment. The message in this paragraph is protect your investment.*

*Act now. Using phrases to suggest action is very effective.*

*An appeal for stability for which any person can appreciate the need.*

*Similar to the appeal which says what the money will be used for, this states when the pledge will be over. Note the suggestive word small.*

*What's in it for the donor:*

*Very personal touch. The reader is especially asked not to let the author down. The reader is given the impression that the author knows everyone he/she is writing to.*

\$10 per month per investigation. Donors have the sense that they will be supporting one investigation if they give \$10, 2 if they give \$20, and so on. This letter shows great creativity — translating a service which costs \$800,000 per year into \$10 per month increments.

#### What to

#### Include with the Letter

In addition to the pledge letter, you need to enclose a pledge card or form, and a return envelope. *Sample pledge cards are shown in Illustration Four.* The purpose of the pledge card is to get the donor to give a specific amount per month or per quarter. (Technically, unless you indicate otherwise, signing a pledge card obligates the donor as much as signing a note for a loan. However, few, if any, organizations take donors to small claims court for failing

to pay a pledge.) The pledge forms should also remind the donor that you will mail him/her stamped, self-addressed envelopes when the pledge is due.

The purpose of the return envelope is not just to get the pledge form back, but also to get the first payment of the pledge.

#### Keeping Track of Pledges

Pledge programs which break down do so usually because the organization does not take sufficient time and care to keep up the pledges.

You need to send a stamped, self-addressed envelope with a note reminding the donor that his/her pledge is due, and how much is owed, 7-12 days before the due date. People may drop out if their pledge reminders arrive at different times during the month. The amount noted as the

### Illustration Three

*This letter with an enclosed pledge card (see below) was sent to people who had given once to Amnesty International in the previous year. The amount and date of their gift was noted on the pledge card. (The following sample is presented with the permission of Amnesty International.)*

Dear Ms. Smith:

Thank you for your recent contribution to Amnesty International. Let me tell you something about how your money has been put to work.

Each week AI receives dozens of letters reporting arrests, brutal mistreatment of prisoners of conscience, "disappearances," and systematic torture of individuals who have angered officials of their governments.

Among the victims are religious and political leaders, union organizers, journalists, demonstrators...and even missionaries and school children.

But before AI can take action to try to rescue the imprisoned and the victims of torture, or find the "disappeared," it is vital that we first confirm the reports we receive — which requires painstaking research.

Independent investigation and accurate data are the cornerstones of AI's work...and there has never been a greater strain on the resources of our Research Department than right now.

We continue to receive more and more reports of political imprisonments, torture, and executions worldwide. Almost daily, we hear of new allegations — often involving deliberate, prolonged cruelty.

Political abductions, frequently ending in the murder and mutilation of the victims, continue.

Thousands of Argentines "disappeared" without a trace...

Soviet dissenters held in mental institutions and "treated with powerful drugs..."

Government security forces summarily slaughtering defenseless thousands in El Salvador (among them, four American missionaries just last December).

Reports like these demand the prompt attention of our researchers, and the cost of their work keeps rising. Last year AI's Research Department in London expended more than \$800,000 on research and follow-up of new cases; this year, over \$1 million will be needed.

There might seem to be little hope of catching up; but I have a novel idea to propose to you which I believe may help to alleviate this constant problem.

It's almost absurd to try to reduce AI's research efforts to a mathematical equation, but consider these figures: About 1,700 new cases were "adopted" by local AI groups last year — approximately a quarter, we estimate, of all the potential cases investigated by our researchers.

More than 6,500 investigations in all, conducted at an overall cost of \$800,000. That averages slightly over \$120 each...\$10 a month per investigation. In that light, with enough good friends to share the burden, the load suddenly seems tolerable!

So...Would you be willing to "retain" Amnesty International for \$10 a month?

What I'm suggesting would be the AI equivalent of a legal aid office for the needy, or a law firm retained by a corporation — we could count on your ongoing support and continue to act promptly whenever we're called upon.

I know that a pledge to give \$10 a month seems a lot for AI to ask of you. But you'd spend more than that on a tank of gas or a restaurant meal...little enough, to enable AI to speak up for those forgotten prisoners.

If you decide to retain Amnesty International with a monthly pledge (of whatever amount you feel you can offer), we'll send you news each month of our activities, together with a reminder of your pledge.

The arrangement would be totally voluntary (and, incidentally, tax-deductible); you could cancel your pledge any time you wish. I promise you that for as long as you can help, your support will make a difference.

Please think about it carefully...and then let me know that you've decided to help us by retaining AI.

Sincerely,

Vincent McGee

Chairman, AIUSA

#### Amnesty International/U.S.A.

304 West 58th Street, New York, NY 10019

YES, I want to "retain" Amnesty International on behalf of Prisoners of Conscience throughout the world. I authorize you to send me reminders of my voluntary pledge to make monthly donations of

\$10     \$15     \$\_\_\_\_\_

I understand I may cancel my pledge whenever I wish.

(date) \_\_\_\_\_ (signature) \_\_\_\_\_

(Keep this receipt of your *previous* tax-deductible contribution for your records.)

Amount: \$10  
Date Received: 06/81

Thank you for your *previous* contribution to Amnesty International/USA. We appreciate your support of our efforts to free Prisoners of Conscience throughout the world.

## Illustration Four

### Sample Pledge Forms

#### I Will Make the Difference

\$ \_\_\_\_\_ Each Week

As part of my commitment to the total mission of the Church, I hereby make this monetary pledge to the Riverside Church for the year 1982.

\$ \_\_\_\_\_ Each Month

\$ \_\_\_\_\_ Each Quarter

\$ \_\_\_\_\_ Payable on \_\_\_\_\_

Name \_\_\_\_\_ Date \_\_\_\_\_

(show here names of other persons covered by this pledge)

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

For office use P \_\_\_\_\_ Ac \_\_\_\_\_ No \_\_\_\_\_

*Typical Church  
Pledge Form*

*Sample reminder card sent monthly or quarterly to people who pledge. Notice that it is very simple and straightforward, requiring minimal bookkeeping.*

DEAR

THIS IS A REMINDER TO SEND IN YOUR

\_\_\_\_\_ PLEDGE OF \$ \_\_\_\_\_

TO THE COALITION FOR THE MEDICAL RIGHTS

OF WOMEN. YOUR CONTINUED SUPPORT IS DEEPLY

APPRECIATED.

CONTRIBUTION TO DATE: \$ \_\_\_\_\_

**I'm pleased by the progress we've made together through Independent Action. But I know we must work even harder if we are to stop the New Right's drive to keep control of the Senate and take over control of the House.**

To provide the vital support for the 1982 House and Senate races, I am renewing my commitment for 1982 by making a *monthly pledge* of:

\$50  \$25  \$20  \$15  \$10  Other \$ \_\_\_\_\_

I know I can cancel my pledge if I choose to do so.

**I'm unable to make a monthly pledge at this time.**

...But I want to renew my support to Independent Action for 1982 and help you continue the campaign to restore progressive leadership to the House and Senate. Enclosed is a special contribution in the amount of:  \$35  \$50  \$70

Other \$ \_\_\_\_\_

Please make your check payable to Independent Action and return it with this form to Independent Action, P.O. Box 1982, Washington, D.C. 20013.



**I**  
*n*  
**hard economic times,  
the pledge deserves a  
second look.**

pledge must be correct, and only one envelope should arrive at a time.

Organizations which have sloppy mailing lists will find it hard to keep up with pledges. A donor who receives a reminder to send in the wrong amount, will not feel confident that his/her donation is being used wisely, and may drop out. If you send your reminders on time, spell names correctly, indicate the right amount, and give special bonuses to your pledges, your drop out rate should not be higher than 5-10%.

Sometimes organizations are tempted to try cost-cutting measures on their pledge programs. They may, for example, send a donor who has pledged \$10 a month

twelve envelopes, and expect that person to send in an envelope each month. People should not be expected to remember to pay their pledge. Even though churches give congregants one envelope for each week at the beginning of the year, they have the advantage of reminding people weekly to turn in their envelopes. Further, for people who don't come to church regularly, the church will send them letters to collect the pledge.

Other organizations leave off the stamp on the return envelope, reasoning that if the donor can afford and is committed enough to pledge, he/she can afford a stamp. Technically this is true, but a stamp makes it easier for the donor to send in the pledge payment, and is a small way to show the donor some appreciation.

It is silly to seek pledges only to sabotage the program with penny-ante cost-saving measures that may cost you donors.

People who pledge should still be sent special appeals and any mailings other donors get. On the anniversary of their pledge, they should receive a letter thanking them for their commitment and loyalty, and asking them to renew their pledge, raising the amount if possible.

Pledge programs are easy to set up and maintain. They do require *attention to detail*, and more ongoing attention than annual renewal appeals. However, the pay-off can be great. A pledge program is a logical extension of any existing individual donor program. KK

Advertisement

## Small organizations are different

Small organizations have small budgets. And overworked staffs. And a board that has lots of commitment and skill, but not a lot of money.

We know that small organizations are different. And we know that they have strengths that bigger groups can't match.

We've helped our small clients do better fund raising without spending a ton of money and we'd like to help you. Call us today for more information.

**WALLY BOCK AND FRIENDS**  
180 Grand Ave., Suite 900  
Oakland, CA 94612  
(415) 645-1506

**Move Beyond  
Cutback & Crisis Management  
with  
Community Training & Development  
Low Cost**

**ADVANCED  
FUNDRAISING  
WORKSHOPS**

Business Planning  
Special Events  
Inexpensive Market Research  
Corporate Solicitation  
Workplace & Federated Fundraising

Send \$1 to receive the Spring 1985 workshop catalog and to be placed on the mailing list:  
CTD; 1095 Market, Suite 612; San Francisco, CA 94103.

## Membership Development: Part 3

# The Brochure

A membership brochure is one of the most important components of any membership campaign. This one piece must reflect the style, philosophy and activities of an organization in such a way that it attracts new individuals' participation. The following article will discuss the essential elements of a membership brochure and how to go about producing one.

The first step is to collect membership brochures of other organizations. Begin to analyze what works and what does not work in each brochure. Is it laid out in such a way that you *want* to read it? Is it too dense and therefore difficult to read? Is it too airy and look as if there is nothing substantial to read? What assumptions do you make about the organization based on the graphics, kind of paper and number of colours used? How do you respond to the tone used in the writing? Does it make you feel like you want to be involved? What about the contents? Does reading the brochure answer all of your questions or raise new ones? If you were interested in getting more information or sending a contribution can you easily determine how to do that?

### The Contents

A membership brochure must answer the following questions. Look over those you have collected to see if and how they have answered them.

1. What does the organization do?
2. Who does it help or serve?
3. If it provides services, who is eligible to receive them?
4. Where is it and what geographical area does it serve?
5. Why is what the group does important?
6. How is it funded?
7. How can someone get involved?
8. Who else is involved?
9. How can the group be contacted?

As you review other organization's brochures, take particular note of the contents included in each. After looking at a few brochures, you will begin to recognize some standard elements incorporated in all of them. They are:

**Organization Mission Statement:** A mission statement

is a one sentence completion of a statement that begins with, "Organization X is..." Examples of organizations' mission statements are:

*"Equal Right Advocates is a nonprofit public interest law firm dedicated to achieving equality of rights under the law for women."*

*"Infact is a peoples' organization building international campaigns to stop abuses of transnational corporations which endanger the health and survival of people all over the world, and particularly threaten Third World people, by creating enforceable agreements with these corporations."*

*"Bread & Roses is a non-profit organization which encourages entertainers to donate their time and talents to provide free live entertainment to institutionalized audiences."*

Note that in each of these mission statements the words used have been chosen very carefully to accurately reflect what the organization is and does. Developing a mission statement is an extremely important part of an organization's development, and should not be done simply for the purpose of a membership brochure. However, if your organization does not have one, this is a good time to develop one.

**General Summary:** This is a section that can be used to expand upon a mission statement. It usually includes details such as how long the organization has been in existence, where it is located, and more specifics about what the organization is and does. Often included in this section is a statement of the philosophy behind or the need for the organization.

**Listing of Project or Program Areas:** Most organizations are defined according to program areas. These are important to list with some explanation of each area. These descriptions will help clarify what the organization does and who it serves.

**Listing of Services Offered:** Sometimes the services offered by a group are mentioned in the descriptions of program areas, and other times not. In either case, it is important that the brochure be clear about what services the organization provides and who benefits from them.

**Sample Achievements:** Often the best way to describe what your organization does is by using examples. Examples also lend legitimacy to your work by saying, "Here are some of the accomplishments for which we have been responsible." Sometimes an organization is best known for one or two victories it had. These are important to include in the brochure. Often the public will know about the victories but not know which organization was responsible for them.

**How the Organization is Funded:** Particularly in a membership brochure it is important to provide a description of the sources of funding upon which the organization depends. This does not mean listing the specific foundations, or donors, but rather, a listing of the kinds of funding, such as, corporations, foundations, government grants, individuals, etc.

**The Vital Statistics:** These are the details that don't necessarily go in one section, but *must* appear somewhere on the brochure. Minimally, they include the organization's name, address and phone number. It may seem obvious that these are important pieces of information to put in a brochure, but quite a few organizations have had to reprint their brochures because something as important as an address got left off.

Most organizations include in vital statistics the names of staff and Board members. Organizations which experience constant turnover in staff should be careful to list only those staff who are relatively long term. Board members should also be listed because they are part of the leadership of an organization and who they are reflects some important information about the group.

One common mistake occurs in the placement of vital statistics on a brochure. Most brochures include a membership form which gets torn off and returned to the organization. Make sure that information like address, phone number and staff and Board names does not appear on the back of the tear-off form so that after someone has joined he/she will still have the information on how to contact you.

**How Others Can Be Involved:** The point of establishing a membership base is to encourage people to become involved in your organization. The membership brochure should list the forms of involvement available. This list may include joining committees, volunteering time, organizing house meetings, participating in leafletting, helping with events, media, outreach, and fundraising, and **contributing money**.

**Description of Membership Program:** This description should include what it means to be a member, who can join, and what benefits one receives by being a member.

**The Tear-Off Form:** The tear-off form is the form that an individual can fill in and send back to indicate his/her interest in being involved in your organization. It is essential to include a tear-off in a membership brochure both to make it easy for people to respond and so that when they do respond you get the information you need. Below is a sample tear-off membership form. Note that specific amounts are

listed as suggested contributions. By listing amounts, an organization is likely to get larger contributions than if each individual is left to determine what would be a reasonable amount to contribute. Membership programs usually have a few categories of members, based on different levels of giving and different benefits offered. This is described in previous articles in the Journal about membership development.

**Yes**, I would like to become a member of the Green Organization. Enclosed is my membership contribution of:

- |   |   |
|---|---|
| <input type="checkbox"/> \$15 (student/ low income) | <input type="checkbox"/> \$ 100 (Sponsoring Membership) |
| <input type="checkbox"/> \$25 (regular member)      | <input type="checkbox"/> \$500 (Benefactors)            |
| <input type="checkbox"/> \$50 (contributing member) | <input type="checkbox"/> \$1000 (Special Friends)       |

Name \_\_\_\_\_

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Phone \_\_\_\_\_

Please make checks payable to The Green Organization. All contributions are tax deductible. Please send to: Green Organization, 700 Mission Ave., Potuck, Mass. 01320.

## Writing the Brochure

As you set out to write a first draft of your membership brochure, the following are a few guidelines to keep in mind:

1. A membership brochure is not a fundraising proposal.

A brochure must be brief. This means that a point that takes three pages to make and substantiate in a proposal must be reduced to one paragraph. If you are not brief, you will have a pamphlet, not a brochure, and you will pay an enormous sum on printing and paper.

A brochure, unlike a proposal, will not usually be read from beginning to end. If you observe people as they pick up a brochure, they tend to glance through it, stopping to read only those sections that catch their eye. For this reason, each section must be written in such a way that it is relatively independent from those preceding it or following it, but encourage the reader to continue. This is also the reason why the use of graphics and design to guide the reader's eye are so important.

2. Before you begin writing, identify the audience to whom you are writing.

Are you writing to attract people who might benefit from your organization's services (potential clients), people who because of their political or social values would want to support your organization, or both? For some organizations, potential members are a completely different group of people than potential clients. For others, there is a lot of overlap

between the two groups. In writing a membership brochure, you must remember that you are trying to attract members. You must make your organization sound like one that involves lots of different kinds of people. You should make sure that a person who has no need for your services would nevertheless find a reason to join based on your brochure.

### 3. *Get outside feedback.*

Writing a brochure can be difficult for someone whose life is immersed in the work of an organization because it is hard to imagine what would be meaningful or impressive to the totally uninvolved individual. For that reason, it is important to have a few "uninvolved friends" review the brochure before it is printed.

## ***Producing a Brochure***

The process of producing a brochure varies greatly according to the in-house skills and resources of each organization. The following provides some suggestions for those unfamiliar with the process.

Because a brochure reflects your organization to the public it is important to that it be neat, organized and attractive. Therefore it is advisable that a professional designer, typesetter and printer be used. If you have access to or the time to recruit the donated services of one or all of these professionals, great. If not, pay for professional help. If an amateur works on the brochure, his/her skill level will be evident in the product. This in turn will reflect on your group.

**The Designer:** The relationship between a designer and an organization is an important one. The designer's style must be one that complements your organization's tastes. The designer must be someone who understands the issues you are working on well enough to represent them graphically; he/she has to understand your limits in terms of costs you can incur and he/she must be able to translate your needs into a product.

You, on the other hand, must be able to effectively express your needs and limits to the designer. A lot of money can be wasted as a result of problematic relationships between designers and organizational clients. It is worth shopping around, and asking for referrals from other organizations. It is also important to recognize when the relationship isn't working and end it before you spend a lot of money on a product that you don't like.

There are several basic steps involved in producing a brochure once it has been written. They include: design, which involves everything from selecting a size for the brochure, and determining how it will be folded, selecting a kind of paper to use and what weight and colour of that paper you will use, selecting a typeface and determining what size of type and what variations of the type such as bold face and italics will be used for different parts of the copy, selecting ink colour(s); getting the copy typeset, laid-out, pasted-up, and printed.

You, as the creator of the brochure can assume a large responsibility for many of these steps or you can assign some

of them to your designer. For example, you can go to a designer having already determined the size, selected a kind of paper, colour ink, and general lay-out and ask him/her to do the basic production. In this case, you would probably work with the designer to select a typeface, and act as a go-between between the designer, the typesetter and the printer. Or, you can go to the designer with only the copy and a very general idea of the format you would like, and ask the designer to suggest the typeface, paper, colours, etc. and coordinate with the typesetter and printer to produce the final product. You should discuss the various stages in the production with the designer, and be clear about what he/she is willing to do and what you want him/her to do, and get an agreement in writing. This kind of discussion will be very helpful to those who are unfamiliar with the process, in that through the discussion they may realize that there are several steps of which they were unaware.

In choosing a designer, interview the person as you would any other contractor. Ask to see samples of his/her work, and show him/her examples of other printed materials produced by your organization, such as brochures, letterhead, or newsletters. If you would like the designer to produce a piece that is graphically consistent with your other materials, say so. If you are open to new graphic concepts, tell the designer. After you have discussed the specific project you want him/her to work on, ask for a timeline and an estimate of costs.

In establishing this relationship, it is important to be clear about what you expect from the designer and what he/she expects from you. Lack of clarity in this area can lead to numerous problems. The most common problem is understanding that you are ultimately responsible for the final product. This means that if the brochure goes to the printer with a mistake made by the typesetter or the designer, it is your responsibility, even though it is someone else's mistake.

Misunderstandings often arise in relationship to unexpected charges. It is important that you understand how much your designer charges and whether the charge is by project or by hour. Be clear about what this charge includes and what will cost extra. Again, get the understanding of who is responsible for what and at what cost in writing before you begin.

The relationship between a designer and client also requires both being able to be flexible and being clear about what elements are negotiable and what are not. You are responsible for the copy; the designer for the physical appearance. Sometimes the copy you write will not work in a particular design. If that happens, both you and the designer will have to understand each other's limits. For example, you may have a limit on what you can spend on this project. One solution to the problem of too much copy may be to increase the size of the brochure, thereby increasing the costs. Another solution is to edit the copy. A third solution may be to alter the design to fit in more copy. Finding a solution that will not compromise the design, the copy or the costs will take flexibility and careful communication between you and your

designer.

Selection of paper and ink colour is integral to a design and so your designer is likely to have some strong opinions about these choices. This is also an area where choices can be made that cost a lot of money. Be sure that the designer knows what financial limits you have so that he/she can make suggestions that fit within your budget.

**Typesetting:** Not all brochures are typeset, but the fact is that one that is looks neater and more professional, and can include more copy. Unless your organization's financial resources are such that you simply cannot afford it, get your material typeset.

There are thousands of varieties of typefaces, and unless you are familiar with them or have a typeface that you absolutely want used in your materials, have your designer select and advise you in this area. In addition to selecting the typeface, consult with the designer about where to use bold type, italics or other variations. These variations are usually used to provide emphasis, and the designer may have some ideas that you have not considered that will achieve the same effect.

When providing copy to the typesetter it is very important to provide clean, double-spaced, typewritten copy. Any mistakes that the typesetter makes because of difficulties reading your copy, you will have to pay to have corrected. Mistakes that the typesetter makes are called typographical errors (T/E) and will be corrected at no cost. Any changes that you make after you see the copy typeset are called author's alterations (A/A) and will be done for an additional charge. Therefore, it is important that you make sure that you provide final copy to the typesetter.

Proofreading is an essential step in brochure production, and is one that is well worth taking the time to do carefully. There are two stages of proofing for which you are responsible. Once the typesetter has typeset your copy, he/she will return it to you for proofing. If you are not familiar with the common editing symbols, ask the typesetter or designer for a list so that you can mark corrections in a way that they will be understood. After you have proof-read the typeset copy, it must be returned to the typesetter for corrections. After the corrections have been made, you should plan to proof-read again to insure that all of them have been made. This proofing can be combined with your "final proofing" which is done just before the project goes to the printer.

**The Printer:** If you are not already working with a printer, ask other organizations who they use. Printing costs vary considerable from printer to printer, so be sure to ask for estimates on your job from several printers before selecting one.

In working with a printer, be aware that "camera-ready" copy must be provided. A printer will print what you provide. Do not expect him/her to straighten out columns, fix spelling errors, notice page numbers missing, or change the colours if the ones selected don't look good.

If you are printing a very expensive piece, you may want to take advantage of points at which you can check your piece after the printer has begun working on it and before several thousand are printed (such as checking the blue line, color key and press proofs). If your piece is costing you more than \$750, it is advisable that you discuss these steps with your designer and printer. Be aware, however, that for a printer to stop a job and wait for you to arrive to check a blue line or do a press proof takes time, and your timeline may have to be altered to accommodate this. Also be aware that any changes made at this late stage can cost you quite a bit. For each change, you will have to weigh the costs and time involved to determine whether they are worth making. The care you take in the early stages of production in proof-reading and reviewing the designer's work will pay off at this point.

**Timelines and Budgets:** Brochure production almost always takes longer than you expect. Before you start, make a list of all of the steps involved and assign times/dates by which each step must be completed. Review this timeline with all those involved (printer, typesetter, designer). This review is important. It makes it possible for you to find out if you are being unrealistic about the amount of time each step will take and for everyone involved to compare your schedule with their own to determine if, based on other work in their calendars, each will be able to work on your job when you have scheduled them to.

Remember, if anyone does not follow the timeline, it will throw off everyone else. This includes you. If, after the first typesetting, you decide that you don't like the way the copy reads, don't expect that one "little" change can be made and then everything can continue as scheduled. Each change takes time.

It is also important to establish a budget for a printing project. Like any project, if you don't know how much each step will cost, ask. Get estimates. When you are collecting other groups' brochures, if you see one that you like, ask how much it cost to produce. Know how much you have to spend and communicate that. Don't let your designer come up with a design that depends on using five colours of ink and glossy paper and then tell him/her that the design is too expensive. Also be sure to find out when changes can be made at no cost and when you will be charged. When you have completed your budget, add in a contingency of 10% to cover extra expenses that come during the production process but are unpredictable.

### **Learn From Your Mistakes**

If you take a look at the brochure after it is printed and find a typographical error, don't be too upset with yourself. Almost everybody makes one or two mistakes. Notice where the errors are, so that the next time you are producing a piece you will spend a little more time checking in that area.



(Thanks to Michael Cox for his advice on the production section of this article.)

# 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 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.**

### New Subscriptions

**Yes**, I want to order the *Grassroots Fundraising Journal*.  
I understand that if I am dissatisfied with the Journal, my money will be refunded for all the issues I have not received.

Name (Please Print) \_\_\_\_\_ Organization \_\_\_\_\_  
Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Please send me a subscription for  One Year (\$20)  Two Years (\$40)  Three Years (\$60).  
(Please allow six weeks for processing of new subscriptions.)

4/85

### Gift Subscriptions

Want to do a good deed for your favorite causes? Buy them a subscription to the *Grassroots Fundraising Journal*. Please send a gift subscription to the following organizations on my behalf. I enclose \$20 per subscription.

Name \_\_\_\_\_ Organization \_\_\_\_\_ Address \_\_\_\_\_  
Name \_\_\_\_\_ Organization \_\_\_\_\_ Address \_\_\_\_\_  
Name \_\_\_\_\_ Organization \_\_\_\_\_ Address \_\_\_\_\_  
Your Name \_\_\_\_\_ Organization \_\_\_\_\_

The *Grassroots Fundraising Journal* will send a card acknowledging your gift. The subscription will start with the next issue. Send to: P.O. Box 14754, San Francisco, CA 94114.

### Renewals

Please renew my subscription to the *Grassroots Fundraising Journal* for:  
 One Year (\$20)  Two Years (\$40)  Three Years (\$60).  
Make checks payable to: *Grassroots Fundraising Journal*. Send to: P.O. Box 14754, San Francisco, CA 94114.

### Back Issues

**Vol. 2 No. One:** So You Want Your Board to Raise Money; Four Months on the Road to Peace; Record Keeping, Part 2: Research.  
**Vol. 2 No. Two:** Getting Over the Fear of Asking; Evaluating Your Board of Directors; Ideas for Expanding Your Mailing List.  
**Vol. 2 No. Three:** The Fine Art of Asking for the Gift; Summer in the Non-Profit World; Expanding Your Board of Directors; Twenty Commonly Asked Questions.  
**Vol. 2 No. Four:** Grammar for Grantseekers; Federated Fundraising; Asking Current Donors for Extra Gifts.  
**Vol. 2 No. Five:** Prospect Identification; The Cost of People; Tying Charity's Hands; Tax Strategies for Charitable Giving.

**Vol. 2 No. Six:** Introduction to Phonathons; 29 Ways for Board Members to Raise \$500; Planning for Fundraisers.  
**Vol. 3 No. One:** Cash Management for Smaller Non-Profit Organizations; Using Phonathons for Renewal; Using a Consultant.  
**Vol. 3 No. Two:** Personalizing Fundraising Appeals; Computers for Non-Profits, Part 1; Setting Up a Canvass, Part 1.  
**Vol. 3 No. Three:** Setting Up a Canvass, Part 2; Computers for Non-Profits, Part 2; Fundraising Luncheons, Part 1.  
**Vol. 3 No. Four:** Fundraising Luncheons, Part 2; Computers for Non-Profits, Part 3; Fundraising During an Election Year.  
**Vol. 3 No. Five:** Marketing Demystified; Case Study of a Successful Special Event; Responding to Put-Offs.  
**Vol. 3 No. Six:** Developing a Membership Base; How to Break Through Bureaucracy; But Will They Open the Envelope?

**Vol. 4 No. One:** Attracting New Members; Tao House Calendar.

#### Order Form

Qty.	Item	Total
	Vol. 2 No. One	2.50
	Vol. 2 No. Two	2.50
	Vol. 2 No. Three	2.50
	Vol. 2 No. Four	2.50
	Vol. 2 No. Five	2.50
	Vol. 2 No. Six	2.50
	Vol. 3 No. One	3.50
	Vol. 3 No. Two	3.50
	Vol. 3 No. Three	3.50
	Vol. 3 No. Four	3.50
	Vol. 3 No. Five	3.50
	Vol. 3 No. Six	3.50
	Vol. 4 No. One	3.50

Qty. \_\_\_\_\_ Total \_\_\_\_\_  
SEND TO: \_\_\_\_\_ Total Enclosed \_\_\_\_\_  
Name \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_  
State \_\_\_\_\_ Zip \_\_\_\_\_

---

**Grassroots Fundraising Journal**  
P.O. Box 14754  
San Francisco  
CA 94114

**Bulk Rate**  
**U.S. Postage**  
**PAID**  
San Francisco CA  
Permit No. 14535

*Moved? Please send us an address-change notice.*