

Grassroots

Fundraising

Journal

Volume 5
Number 1
February 1986
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In This Issue:
State of the
Journal; Raising
Money from
Churches;
Creating a
Successful
Renewal Program.

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

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(width precedes depth)

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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 State of the Journal

February, 1986, marks the beginning of the fifth year of the *Grassroots Fundraising Journal*. We think this is a good opportunity to reflect on our past and comment on our future.

The *Journal* now has 1,300 paid subscribers and a circulation of about 3,000 readers. When we started in February, 1981, we had 50 paid subscribers. We recruited them through an introductory "charter subscriber" ad. Loyal friends and family signed up, and most have remained subscribers. We began with an investment of \$600—just enough to bring out the first issue and do some mail appeal advertising. Each subsequent issue paid for itself, and when there was money left over, we advertised in magazines or sent more mail appeals. We began handing out subscription forms at fundraising trainings and conferences, and soon other trainers were doing the same for us.

Some people have asked us why we didn't incorporate as a non-profit and seek foundation funding. The answer is two-fold: one, we felt that a journal which described fundraising for self-sufficiency ought to be self-sufficient and not foundation dependent; and two, we wanted total control over the content of the *Journal*.

Our incentive for starting the *Journal* remains our underlying motive for keeping it going: to provide information, success stories, models, charts, forms, opinions and how-to's about all types of grassroots, community based fundraising. Our audience also remains the same: organizations engaged in social change and social service with budgets under \$500,000.

Because so much of what we publish applies to all groups, it follows that all types of groups subscribe to the *Journal*. We now have subscribers in

all 50 states, as well as Puerto Rico, Canada, Malaysia, England and Denmark. Subscribers include national organizations with multi-million dollar budgets, churches, hospitals, universities, public and private schools, libraries, consulting firms, and individuals, public and private schools, libraries, consulting firms, and individuals, but the vast majority of subscribers are small organizations with one or two or no paid staff. About 40 percent of our subscribers are in California, where the *Journal* is published. About half of the subscribers are in metropolitan areas, with about 20 percent from towns with populations under 25,000; many of the latter are identified with rural organizations.

The success of the *Journal* in the past two years owes a great deal to the loyalty, competence and hard work of three people: Nancy Adess edits many of the articles submitted to the *Journal*; Leanne Bynum handles subscriptions, renewals, the mailing list and orders for back issues and reprints; and Michael Cox, who joined us three years ago as the graphic designer.

The publishers remain close friends. Kim Klein has a thriving practice teaching groups how to do grassroots fundraising. In 1985, she travelled more than 50 percent of the time and went to 30 states. In June, 1985 she published a book, *Fundraising for Social Change*.

G F J

FIFTH

YEAR

For the past two years, Lisa Honig has devoted all her time to peace and anti-nuclear work including living at Greenham Women's Peace Camp outside the U.S. Air Force Base at Greenham Common, England, founding a peace camp here in the Bay Area, and fighting the homeporting of a battleship carrying nuclear weapons, the USS Missouri, here in San Francisco. She is in the middle of her first year of law school, and hopes the study of law will provide her with additional skills to work for social change in this country.

Many people ask us about the future. We plan the *Journal* one year at a time. There are many topics the *Journal* has not yet examined thoroughly, such as capital campaigns for small groups, budgetting, deferred giving, products for sale, direct mail, workplace giving, to name a few. With this issue, we begin looking at raising money from churches.

We are planning to publish two more reprints this year: one on special events and another on membership. Our current reprints—*Major Gifts Campaigns* and *Boards of Directors*—have been very popular. Many readers have ordered multiple copies of the *Boards of Directors* reprint as a nice addition to a Board member handbook, and other readers have ordered multiple copies of the *Major Gifts Campaigns* for their fundraising or large donor committees.

Response from readers and reviewers continues to verify that the *Journal* fills an important need for fundraising knowledge among non-profit organizations. The price is right (we have no plans to raise the price) and the content is appropriate. As long as we continue to hear that, we will keep publishing.

Kim Klein & Lisa Honig

We will be celebrating five years of the *Journal* on Tuesday, February 25, from 5:30-9:00 at Modern Times Bookstore, 968 Valencia Street, San Francisco. Everyone is welcome! There will be refreshments, entertainment, and back issues of the *Journal* for sale at discounted prices. See you there!

Just Published!

From the co-editor of the *Grassroots Fundraising Journal*, a book guaranteed to get you results:

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By Kim Klein

The nuts-and-bolts strategies that *all* small nonprofit groups need to raise money successfully from individuals.

Learn how to:

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Organization _____

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Send orders to: Kim Klein, P.O. Box 14754,
San Francisco, CA 94114

Raising Money From Churches

by Gary Delgado

LEVERAGING

GOD'S RESOURCES

FROM HER

REPRESENTATIVES

ON EARTH:

A WORKING MODEL

Is there a light at the end of the tunnel? Short of smashing capitalism, probably not. However, there is a glimmer of hope from a potential source of support that is substantial and, if the work is meaningful, repeatable—the churches.

In addition to the fact that religious institutions have more money to give away (\$7.5 billion in 1983) than corporations (\$3.1 billion in 1983) and foundations (\$3.46 billion in 1983) combined, church fundraising is an activity that has a number of benefits not present in the foundation and corporate worlds:

Access

More than 40 percent of the U.S. population attends church regularly. The percentage of church attendees in low-income organizations is often higher. Our members are their members. Therefore, a prime point of entry into the church world is our own membership.

Legitimacy

Outreach to churches can short-circuit some criticism, dispel some rumors, and in many cases build alliances for the long haul. The authority, weight, and credibility of a local minister and/or congregation can often be utilized effectively in our work.

Resources

Aside from giving money, churches can often provide organizations with resources for organizational stability and growth, such as meeting and office space, printing, publicity (via church bulletins or access to denominational publications), and volunteers.

One disadvantage is that church fundraising usually takes a long time to pay off—anywhere from six to 24 months. And, because churches do not see themselves primarily

Yes, it is a fact. Money for organizing, advocacy and almost anything reasonable is drying up. Government has retrenched, foundations are running scared and individual donors are receiving direct mail requests at a rate far exceeding their capacity for or interest in giving.

as philanthropic institutions, the ground rules for applying for funds are different for each program within each denomination. Very often it is difficult to catch up with the person responsible for proposal review since, for church people, funding is only one of a number of responsibilities. Even taking these problems into account, however, the work is worth it. Church money is, for the most part, an expression of the church's philosophy. Many churches do believe in peace, social and economic justice and empowerment of the oppressed, just as we do. So, we don't have to hide the fact that we are working for institutional change. Moreover, because the church's commitment is moral, it tends to be less hung-up about repeating grants to good organizations. Since the church as an institution has been around for a good number of years, most church funders do not expect your organization to change the world in a year or two or express your measurable progress in quarterly reports. Finally, clergy people know that it takes money to run an organization—many of them ask for it at least once a week. Often we can tap their fundraising expertise to help us get a handle on raising money within their particular denomination.

Preliminary Work

Before making any moves in the church world, it is necessary to understand the formal/informal structure of local church organizations, their relationship to the national church funding sources, and who the key actors are. One good source for the lowdown on local churches is the local Council of Churches. Not only is the Council often an instrument for church activists interested in social justice, it frequently publishes a directory. If you can develop a good rapport with any of the folks at the Council, you may get a rundown of who's likely to support your organization. It is important to develop local contacts in

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all the major denominations because your organization can get resources of some sort from almost every one. Most funding sources require that projects or organizations applying for funds have some degree of support or approval from the local church level. For the Catholic Church this is true for the social justice fund known as the Campaign for Human Development, but it is even more important for fundraising from the orders of men and women religious who also have giving programs.

In a recently published guide to church funding sources, the author notes, "when looking for the support of any church, the value of personal contacts within the church *cannot be overemphasized.*" People give to people, so it is very important to do an internal survey of your organization and find out who your members and staff know and to what churches they belong. In addition to personal contacts, it is important to have a general sense of the structure of each of the denominations.

Bottom Up or Top Down?

Most church denominations have funding mechanisms at both the local and national levels, often with regional evaluations. Getting an endorsement and/or funding from a local entity is usually helpful in going for a larger national grant. However, reversing the process often does not work. In fact, if you receive national funding without dealing with the local folks you can often inadvertently offend people at the local level. Local opposition to your project will almost certainly make it difficult to move resources from the national church bodies.

First Moves

After getting together a list of clergy, decide how you are going to make contact. There are a number of ways to begin, including:

- staff and organizational member make a presentation at the local council of churches or to a group of denominational executives and then follow-up with visits to individual members of the council;
- do a mailing to churches and follow it up with meetings;
- have members of your organization set up meetings with their minister, priest or rabbi;
- get two or three key clergy to set up the meetings for your group;
- use any or all of the above methods in combination.

Even on the local level, the question of top-down/bottom-up arises. If you opt to target the denominational execs rather than the local neighborhoods, ACORN Regional Director Mike Shea, who went that route, cautions, "To avoid problems, start at the top. The denominational executives can put the damper on individual churches very quickly. In our Colorado campaign, the presentation was given to denominational bigwigs and we asked for letters of recommendation/

endorsement to their individual churches. Some agreed. But even the hostile ones implicitly agreed not to interfere with our attempts to line up individual churches for support."

If you decide to go through local contacts first, try to use your organization's personal network, having your members who belong to church groups contact the appropriate person working in the local congregation. If you don't have contacts within the church, it's a good idea to contact ministers or other key individuals by letter. Calling first may get you a prompt "no" or a stall. Follow up the letter with phone calls or personal visits, especially to key actors in the area. The most successful contacts in one effort were among United Methodist Churches (seven of the nine largest churches were receptive to meetings). A list was obtained through the local district office and one general endorsement letter opened the door to a number of interested ministers.

After the letter has been sent, keep phoning. It can sometimes take as many as 15 calls to line up a meeting. Keep an accurate file of clergy and committee contacts and a "tickler file" of when follow-up calls are to be made. Getting appointments with clergy can be tough. They may not return phone calls. Your members may not be helpful in putting together a meeting. However, a sure way to introduce yourself to clergy people and ask for a meeting face to face is to approach them right after their services on Saturday or Sunday.

First Meeting: Putting the Organization on the Church's Agenda

No matter who sets it up, the first meeting should include a staff person, at least one member of your constituency, and a representative of the church. The purpose of the meeting should be to establish the basis of a relationship between the church and your organization. Therefore, the member of your constituency should briefly explain:

- How the particular problem your group is working on affects him/her and what your group expects to do about it;
- The types of issues your group works on, with examples of successes and failures;
- The general constituency your group works with, and why;
- Some examples of how your group has worked with other churches, labor, other community organizations, etc., or why you need to.

It is as important to communicate *why* you do the work as it is to communicate what the work is. It is also important to give the person some sense of how the group makes decisions. If the church representative seems receptive, you should ask for his/her participation in your group's current efforts. Participation builds understanding and

The value of personal contacts within the church cannot be overemphasized.

commitment and can come in a number of ways, including:

- attending a meeting of your group;
- participating in an action;
- writing an article for the church publication;
- writing a letter of support for your organization;
- arranging an opportunity for your group to speak or make a slide presentation to the church's membership or to a special committee.

Use your judgment, but my experience says that in the first meeting you can push a lot of things, but do not ask for cash. You may get turned down or you may get it, with the minister thinking that all you wanted was the money. Make no mistake, money is important, but what you are after is the development of a relationship that will result in the commitment of church resources over the long haul. No matter what kind of an agreement you get, remember to write a thank-you letter and, if possible, print a "thank you to our church supporters" in your newsletter. If it's convenient, try to use the church for a group meeting between the first and second meetings with the clergy.

Presentations

If you have the opportunity to make a presentation to a church body, keep in mind the same points mentioned for the first meeting with the clergyperson. If a member of the group is doing the presentation, be sure to prepare the person by going over a rough outline and role play some sample questions. (A rule of thumb is that it usually takes an hour of prep for every 20 minutes of presentation.) If you intend to use pictures or a slide show, make sure you know what the set-up in the room is. If you need a projector, tape recorder, extension cord, etc., check with the church to see if there is equipment you can use. At the presentation, the following components can be

included:

- introduce the purpose of the meeting (“To get our organizations better acquainted and to solicit your support for our bilingual education campaign.”);
- show your slide show or make a general presentation about the organization;
- anticipate questions from the audience and answer some of them (“You may be asking yourself whether we really expect the school board to concede on the bilingual issue...”);
- answer other questions from the audience;
- make the pitch for support. If you’re meeting with a committee you can either ask for participation or you can ask for money. If you decide to ask for money BE SPECIFIC: “We need \$250 for a mailing; \$500 for printing fact sheets and leaflets; \$1000 for buses for an action,” etc.;
- be sure to have your own sign-up sheet so you can follow up with anyone who might be willing to volunteer.

Follow-Through: Upping the Ante

Your objectives for the second church meeting are: 1) to obtain resources; 2) to convince the church contact to become an advocate for your organization within the bureaucracy; 3) to set the stage for your organization getting successful contacts with other local clergy and national funding agencies.

The first thing you want to do in the meeting is get some feedback. If the clergy person has attended a meeting/action/presentation, ask for his/her impression. Very often s/he can give you pointers on how to present your case more effectively. If s/he didn’t like something

about your meeting or presentation, provide an opportunity to tell you and to suggest improvements. Ministers work in groups all the time and very often they’ll catch something that we might have missed.

After getting the feedback, explain how your group’s work is going and what your needs are. Try to figure out what kind of assistance the church can give to your efforts.

Possibilities include:

- office space;
- donations of furniture or equipment;
- volunteers or the temporary assignment of paid staff to your current campaign;
- payment of telephone or utility bills;
- printing;
- money for specific expenses;
- matching grants.

One good way to get local churches to pay for specific expenses (rent, phone, etc.) is to leverage: “Rev. Alonzo is paying the rent—can you pay the telephone bill for the next six months?” For really enthusiastic folks, ask them to hold a fundraiser for you—a raffle, bingo, etc.

Depending on how successful you are with these local meetings, it may make sense to try to use the “political capital” of the local clergy in your campaign. You can get a special clergy committee or even the local Council of Churches to “investigate a problem” or to sponsor or co-sponsor public hearings with your group. Very often these activities give church activists hands-on experience and a stake in both your organization and its issues. At the very least, clergy people who support your group should be asked to help set up meetings with other clergy or invite your group to denominational gatherings.

Major Protestant Denominational Structures

<i>Denomination</i>	<i>National</i>	<i>Regional</i>	<i>Sub-Regional</i>	<i>Local</i>
Episcopal	General Convention	Province	Diocese	Church parish
Presbyterian Church, U.S.A.	General Assembly	Synod	Presbytery	Church congregation
United Methodist	General Conference	District	Local conferences	Church congregation
United Church of Christ	General Synod	Conference	Association	Church congregation
American Lutheran	General Convention (Nat’l Church Council)	District	Conference	Church congregation
Lutheran Church of America	Biennial Convention		Synod	Church congregation
Lutheran Church/ Missouri Synod	Convention	District	Circuit	Church congregation
Christian (Disciples of Christ)	General Assembly (General Board)	Regional Office		Church congregation
American Baptist	Biennial General Board meeting	Regional Office	Association	Church congregation

Source: *Women’s Technical Assistance Project, Center for Community Change, Washington D.C.*

NCCC/Ecumenical Review Board*Chairperson: Dr. David Crean*

American Baptist Churches
Neighborhood Action Program
National Ministries
Valley Forge, PA 19481
Contact: Rev. A. Roy Medley
(215) 768-2418

American Lutheran Church
12006 Briar Lane
Minnetonka, MN 55343
Contact: Mr. Gene Sylvestre
(612) 545-5977/8163

*Campaign for Human Development
1312 Massachusetts Ave., NW
Washington, DC 20005
Contact: Douglas Lawson
(202) 659-6650

Church Women United
475 Riverside Dr., Room 812
New York, NY 10115
Contact: Ms. Patricia Roache
(212) 870-3238

*The Episcopal Church
Hunger Office
815 Second Avenue
New York, NY 10017
Contact: Dr. David Crean
(212) 867-8400

Jewish Fund for Justice
1334 G Street, NW, 3rd Floor
Washington, DC 20005
Contact: Ms. Lois Roisman,
Executive Director
(202) 638-2550

*Lutheran Church in America
231 Madison Avenue
New York, NY 10016
Contact: Mrs. Audrey Russell
Mrs. Kay Dowhower
(212) 696-6788

Lutheran Church/Missouri Synod
1333 S. Kirkwood Road
St. Louis, MO 63122
Contact: Rev. Melvin Witt
(314) 965-9000

The Presbyterian Hunger Program
475 Riverside Drive, Room 1268
New York, NY 10115
Contact: Rev. Joseph Keesecker
Ms. Judi Coats
(212) 870-3108

United Church of Christ
Hunger Office—16th Floor
475 Riverside Drive
New York, NY 10115
Contact: Rev. Neill Richards
(212) 870-2951

United Methodist Church
Bd. of Global Min./Nat'l Division
475 Riverside Drive, Room 332
New York, NY 10115
Contact: Rev. Kinmoth Jefferson
Mr. Clay Hammond III
(212) 870-2832/3820

Marianist Sharing Fund
4301 Roland Avenue
Baltimore, MD 21210
Contact: Mr. Richard E. Ullrich
(301) 366-1324

*Executive Committee

Receives Proposals for Information:

Reformed Church in America
475 Riverside Drive, Room 1815
New York, NY 10115
Contact: Rev. Everett L. Zabriskie
(212) 870-2265

Staff for the ERB

Mary Ellen Lloyd, *Director*
NCCC/Ecumenical Review Board
Division of Church & Society, Rm. 572
475 Riverside Drive
New York, NY 10115
(212) 870-2307/2308

If persistently pursued, this local approach can really pay off. One group I worked with got a free office, free furniture for two offices, free printing, and \$32,000 in cash over a year's time. More importantly, when the group was attacked by the IRS, our newly-recruited United Church of Christ minister went with us to the hearing and attested to our group's good non-partisan work organizing poor people.

One thing to remember is that working with churches is a two-way street. If you develop the relationships and really pay attention to what clergy people have to say (since many of them organize congregations larger than our groups), the collaboration will work for both parties. If

you just go for the money, you may get it—once. So if you want a long range relationship, pay attention to the self interest of individual clergy.

Parlaying Local Contacts into the Big Bucks

As I mentioned earlier, many local churches have once-a-year giving cycles, usually in late fall. However, not only do the Episcopalians, United Church of Christ, and Methodists have different application forms, within each denomination the various funding agencies have different forms. Yes! It is a pain. But, not to worry. The secret to

Grassroots Fundraising Journal

filling out all these different applications is to *write out the proposal for your project first* and then excerpt from your proposal for each application form. There are a couple of other tricks to the application form.

First, because they often give you two lines to tell them what you are going to do, feel free to use 12 point pitch on your typewriter, reduce your answers at a xeroxing place and photocopy onto the application so that you can make your case in the space provided. Secondly, even though they don't ask for it, attach your full proposal and anything that supports it, including news clips, staff/board list, etc.

Many local funders will automatically submit your proposal to national sources. However, another way to have your proposal examined by a number of national church funders is to go through the Ecumenical Review Board (ERB). To get your project reviewed by the ERB you need to have it sponsored by one of the board's members. Mary Ellen Lloyd, the Director of the ERB, is

a good person to talk to about a likely sponsor. If you have a relationship with a local clergy or lay person who has a contact on the ERB that's another way to proceed. Your sponsor sends in your proposal with a cover letter and enough copies for each member of the board. A board member (not the sponsor) evaluates the proposal and submits the evaluation to the board a whole. Your sponsor then makes a presentation to the board. (See box on previous page for current ERB members.)

The ERB does not give money! However, it does indicate whether the project your organization has submitted would be appropriate for submission within the denomination. Therefore, after the evaluation your group might receive a letter from the ERB which states:

Dear Valley Welfare Rights:

The Ecumenical Review Board in their 1985 Fall Cycle Review voted to commend your request for funds to the following members for review in anticipation of possible dollars:

National Funding Sources

Without a doubt the best current resource on church fundraising is a packet entitled "Resource Guide to Church Fundraising" produced by the Women's Technical Assistance Project of the Center for Community Change, 1000 Wisconsin Ave. N.W., Washington DC 20007. This packet, for which the group reluctantly accepts a \$5 donation, includes deadlines and applications and the format is excellent. Another compilation entitled "Church Funds For Social Justice" is available for \$9 postpaid from the Greater Minneapolis Council of Churches, 122 W. Franklin Ave., Minneapolis, MN 55404. A third resource, entitled "The Church Funding Directory," contains all of the major sources as well as a fair number of Catholic Orders that fund social change. It is available for \$4 postpaid from the Center for Third World Organizing, 3861 Martin Luther King Way, Oakland, CA 94609.

Some of the sources included in these directories not on the ERB include:

Christian Church (Disciples of Christ)
General Reconciliation Committee
of the Church Finance Council
P.O. Box 1986

Indianapolis, IN 45206

Areas of interest: housing/community organization/
peace/race and poverty

Grant size: \$300-\$10,000

Contact person: Rev. Ernest Newborn

First Unitarian Society

UU Social Concerns Panel Fund

900 Mount Curve Ave.

Minneapolis, MN 55403

Areas of interest: One time "cutting edge" projects in
the area of social reform

Grant size: \$1,000-\$10,000

Contact person: Rev. Koran Aresian or Beth Waterhouse

Marianist Sharing Fund

4301 Roland Ave.

Baltimore, MD 21210

Areas of interest: leadership development/community
organizing/peace advocacy

Grant size: \$4,000 limited to New England, the Midwest
and West

Contact person: Richard E. Ullrich, Exec. Secretary

The General Commission on Religion and Race
of the United Methodist Church

110 Maryland Ave. N.E., Box 48-49

Washington, DC 20002

Areas of interest: women's issues/empowerment/
minority concerns

Grant size: \$4,000-\$15,000

Contact: Rev. Kenneth Deere, Assoc. Gen. Secretary

Sisters of Loretto

Special Needs Committee

3001 S. Federal, Box 1113

Denver, CO 80236

Areas of interest: social justice

Grant size: \$500-\$2,500

Contact: Nancy Finneran

*American Baptist Churches,
American Lutheran Church,
The Episcopal Church,
United Church of Christ
United Methodist Church*

The following members responded that your request is already moving through their process for possible funding:

*Presbyterian Church, U.S.A.,
Church Women United,
Campaign for Human Development*

I am enclosing information for your guidance into the individual member reviews and will be glad to answer any questions you might have. Please discuss the review with your sponsor, as well.

It was good to meet you at the CHD Celebration this summer.

*Sincerely yours,
Mary Ellen Lloyd*

Even when the ERB members indicate support from their denominations, it does not mean that the funding agencies will support your project. For instance, my own organization, The Center for Third World Organizing, received favorable responses from seven ERB members but only three agencies funded our project. However, the connections and the discussions we have had with the places that didn't fund us have proved invaluable in our

subsequent fundraising efforts.

A Word To The Wise

My grandmother always used to point her finger at me (in fact, the last time I saw her she did it again), look me dead in the eye, and say, "A word to the wise is sufficient." Now, I've never figured out what this cryptic West Indian proverb really means so I'm passing it on to you. The fact that I've titled this article "a working model" means that it has worked for a number of the groups that I've worked with. But it has also been modified and refined by a number of people who've tried it. The only way for me to update it is to get feedback from other people who use all or some parts of it. So, if you use any of these ideas or if you have problems, please write or call.

Gary Delgado is the director of the Center for Third World Organizing (CTWO), a network of organizations, researchers and activists committed to working with Asian, Black, Latino, and Native American organizations working to achieve social justice. Gary has a Ph.D. from the University of California, Berkeley, and is the author of Organizing the Movement. He has 15 years of community organizing experience.

NAEIR Begins Its Tenth Year of Free Goods to Non-Profits

A unique national non-profit association is beginning its tenth year of proving that it is indeed possible to get something for nothing.

In fact, the National Association for the Exchange of Industrial Resources (NAEIR) continues to prove it so successfully that today nearly 5,000 non-profit organizations, schools and charitable service groups are receiving millions of dollars worth of useful products and materials each year, free of charge.

At first, though, it was little more than a dream. When Norbert C. Smith founded NAEIR in January, 1977, he really didn't have much more than a dream to work with.

He knew from previous business ventures, however, that U.S. industry possessed billions of dollars worth of excess inventory and slow-moving material that was gathering rust and dust in warehouses all across the country. In many cases, this useful, first-quality merchandise was being sold to surplus jobbers at a fraction of its value or simply

being scrapped because it cost more to store it than to throw it away.

From his experience as a charitable gifts consultant for several major corporations, Smith also knew that thousands of non-profits were being told to do more with less as contributions dwindled and budgets were slashed.

Thousands of these groups could benefit greatly from industry's surplus, if only they had access to it. What was needed, he saw, was a national association to solicit this merchandise from industry—which didn't want it—and distribute it to non-profits—which did.

The result was NAEIR, the largest and only national gifts-in-kind association in the United States, which last year solicited over \$30 million worth of useful material from industry, and then distributed it free of charge to its members.

NAEIR's donors were then eligible for a federal tax deduction of up to twice the cost of the material donated,

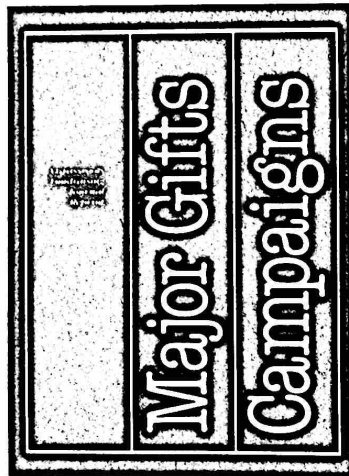
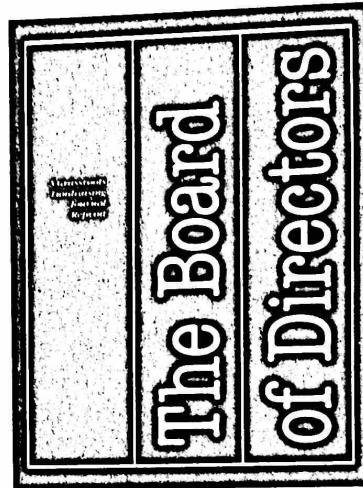
continued on page 18

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Creating A Successful Renewal Program

by Nancy Adess

Nancy Adess is the former director of DES Action National, a grassroots organization educating the public and health professionals about the drug DES (diethylstilbestrol). She now has her own business as an editor. She is the copy editor for the Grassroots Fundraising Journal. In this article she describes the successful renewal program she devised for DES Action.

An organization works hard to build its donor base. Each new membership represents outreach and education about your issue to prospective donors, and your success in winning them to support your cause. A key element often overlooked by small organizations is maintaining donor support through a successful membership renewal system. Getting someone to be a donor the first time is hard, but with very little effort, that person can be encouraged to renew their gift on a yearly basis.

Membership renewal is crucial to an organization's ongoing financial stability. This article describes a basic renewal system which is simple to implement and results in greatly increased renewal response.

Overview

The key to this membership renewal system is that people are given more than one chance to renew their membership. Through a spaced series of mailings, members are first asked to renew, then (for those who don't

renew) reminded of their need to renew as many as three times before being deleted from the membership rolls. Although the non renewing members' subscription to the organization's newsletter (or other benefit your organization offers) does end when his/her membership year is over, he/she stays on the "inactive" mailing list, receiving special appeal mailings and other notices that go to all current and inactive members. These other mailings, in addition to repeat renewal letters, reminds inactive members of their past support of the organization, and keeps the organization's name and work in front of them.

In this system, "major donors"—people who have given \$50 or more, or whatever you define as a significant contribution—are treated separately from "regular" members for the first renewal letter. The major donor renewal letter will be discussed later.

The first renewal mailing goes to all regular members whose membership is due to expire that quarter (or month, if your membership system is on a

monthly or bimonthly basis). A second renewal letter goes out eight weeks later to all those who have not yet renewed. A third letter goes to those who have still not renewed sixteen weeks following the first letter. And a final notice goes to those who remain inactive nine to twelve months after the first renewal mailing. (See sample timeline).

All mailings must go out on time, when scheduled, for this system to work. Otherwise, people will not have enough time to respond to one mailing before receiving the next. This can make for some grumpy members. The timings of the mailings are based on a formula that takes into account the length of time it takes a piece of bulk mail to reach the furthest destination (four weeks for cross-country, except at holiday time), plus a reasonable length of time for a person to respond (four weeks). Those who receive the mailing sooner will have even more time to respond before being sent another notice. Renewal notices sent at these intervals are far enough apart to give people a chance to respond before being sent another notice. Renewal notices sent at these intervals are far enough apart to give people a chance to respond, but not so widely spaced that inactive members lose sight of or interest in the organization altogether.

Even using this formula of "sufficient

Sample Timeline

Mailing Dates	1st Appeal	2nd Appeal	3rd Appeal	Final
January 11	×			
March 7	○	×		
May 3	☆	○	×	
July 12		☆	○	
September 13			☆	
October 11				×
November 8				○
January 10				☆

- × Members whose memberships or subscriptions expire during January-February or during the first quarter.
- Memberships expiring during March-April.
- ☆ Memberships expiring during May-June or during the second quarter.

time," second or third mailings do occasionally overlap with a member's renewal check. Donors, like the rest of us, don't like to be reminded about a bill they've already paid. Therefore, it is very important that second and third renewal letters, discussed in more detail below, acknowledge that they might be crossing in the mail with a renewal check. The postscript is a good place to put this thought, as in "P.S. If you've already sent your renewal check, thank you—your renewal and our letter have probably crossed in the mail."

As with any mail appeal, the renewal package contains a letter, a mailback card, and a mailback envelope, all in a carrier envelope. Let's look at the parts of the appeal in closer detail.

1. The Mailing List

It is essential that your mailing list be coded for expiration date of your members, and be easily retrieved onto mailing labels according to expiration dates. If your list is larger than about 2,500 names, placing it on a computer (either your own or that of a computer service firm) is probably the most efficient way to maintain it and retrieve labels by expiration date. If your list is not on a computer, devise a way that you can easily get labels and keep track of people renewing between the first mailing and the second (and between the second and third), so that those who

have renewed do not receive further renewal mailings.

2. The Letter

Some renewal letters, like those in some initial direct-mail campaigns, are long treatises on the problems of the world and how the organization seeking your donation is trying to solve those problems. This type of approach is not necessary. Recently, some organizations have been sending initial appeals consisting merely of a small card with the potential donor's name and donation amount options on one side, and the "appeal," or message, on the other. This style will work equally well for first renewal appeals to members of your organization, and means that you do not have to include a separate letter for the first appeal. Merely write your message on the "back" of the renewal card (the "front" of which is described below). (See example.)

Your renewal message needn't be long. A short message can be just as effective as a long one, and your donor will appreciate not having to read a lengthy document about work she or he is already supporting. (Leave reports on your programs for Annual Reports, articles in your newsletter, or special appeals.) The message should simply say: 1) It's time to renew your membership; 2) with your renewal you will continue to receive the organization's

newsletter or other benefits, and you will continue to support important work on a cause you care about; 3) we appreciate your ongoing donations, and 4) your contribution is tax-deductible.

More than half of your donors will renew with the first appeal. To those who don't you will need to send a more compelling second mailing eight weeks after the first. This time, a short letter may get their attention. Write one that will fit on a half-sheet of stationery or note paper. Remind them that their subscription or membership has expired and that you hope it was merely an oversight. As with the first appeal, mention one or two reasons they might still wish to renew (continue receiving the information provided by your newsletter or other publications; know that their donation is helping to address an important problem). Remind them that their donation is tax-deductible. And don't forget the P.S., thanking them if they have renewed already. (See example.)

A healthy percentage of those who receive this second letter will renew. But for those who don't, a third appeal, sent eight weeks after the second, is definitely worth the expense and time. This time the letter could begin, "Have you forgotten something? Your membership in Project for Important Cause has lapsed." Again, remind them of the benefits to them and to the cause of their donation, and say you hope they'll renew immediately so that they won't miss a single issue of your newsletter. Use the same P.S. as in the second letter.

For those who do not respond to this third appeal, leave them alone for a while. Then, six to nine months following their first renewal appeal, send a final mailing. This can be identical to the first appeal you sent many months before, using the same renewal card printed on both sides. It will look vaguely familiar to them, and if they had meant to renew then, or are having positive urges to renew now, the simple message on the card will push them to do it. There's no need to thank them for a renewal that might be in the mail—it's been far too long for that to

The First Renewal "Letter"

(This is printed on the other side of the mailback card; see below for front.)

**YES – I want to continue getting the answers about D.E.S.
Enclosed is my tax-deductible membership.**

- Subscriber: \$20-\$40 Receives the **D.E.S. Action Voice** quarterly.
- Friend: \$50-\$250 Receives the **Voice** plus your choice:
 - DES: The Complete Story* by Cynthia Orenberg
 - A sturdy D.E.S. Action Tote Bag
- Supporter: \$250 and up Receives all of the above plus special reports on D.E.S. Action's work and progress.

DES Action National Long Island Jewish Hospital New Hyde Park, NY 11040

Please note any address change

The Mailback Card: Front

D.E.S. ACTION – Renew Your Membership Today

**D.E.S. –
More
Questions
More
Answers**

What is the latest research about D.E.S.?
 Will I have any problems from my D.E.S. exposure?
 What about my children?
 What have other people experienced?
 Many questions about D.E.S. have been answered. But many remain. D.E.S. Action works to find answers to all the questions about the D.E.S. story.
 You can keep up with the questions and the answers from medical, legal, and personal viewpoints through the national quarterly, the **D.E.S. Action Voice**.
 Keep up to date on D.E.S. Renew your membership today. Each membership of \$20-\$40 receives the **D.E.S. Action Voice** four times a year. Memberships of \$50 or more also receive a free gift. See reverse for details.

The Second Renewal Letter

DES ACTION

Dear DES Action Member,

You may have missed our reminder to renew your membership in DES Action. Your renewal is now overdue, and we want to make sure you don't miss an issue of the DES Action Voice.

The DES Action Voice is your source for up to date, important information about DES. We summarize the latest medical research reports, share personal stories, answer your questions to doctors, and much more.

With new information coming out all the time about DES exposed mothers, daughters, and sons, it's important to stay informed.

Send your renewal today, and you won't miss the next issue of the DES Action Voice.

And please be as generous as you can. DES Action continues to grow and to need your generous support. Our 31 volunteer offices around the country, as well as our affiliates in Canada, Australia, and Europe, are working at maximum efficiency to make sure everyone knows about DES and receives proper medical care -- and to make sure the DES story doesn't happen again.

If you've already sent your renewal -- thank you. If you haven't, please send your tax-deductible contribution today.

Sincerely,
Nancy A. Hess
 Nancy A. Hess
 Executive Director

NATIONAL

East Coast Office: 11 Jewish-Hillside Medical Center, New HydePark, N.Y. 11040 (516) 775-3350
 West Coast Office: 2815 24th Street, San Francisco, California 94110 (415) 826-5060

be likely.

3. The Mailback Card

The mailback card is the card on which your member indicates at what level of membership they wish to renew, and which they send back to you, along with their check, in the return envelope. In order to fit into the return envelope, the card should be 3¼ by 6 inches.

In this system, the mailback card has all the renewing information, including the donor's mailing label, on one side of the card. Place the mailing label on the card so it will show through a "window" envelope (more on the carrier envelope in a moment). With the label on the card, rather than on the envelope, any information coded on it that identifies your donor to the computer stays with the renewal card when it is returned to your office. Most computer generated labels have a "match code" or identifying data, and

can also contain codes indicating amount of last gift, date of last gift, expiration date, etc., as you wish. Having the label on the card also saves the donor the trouble of writing their name and address on the card, simplifying the renewal process.

Cards that are used for the first and very last (fourth) renewal mailing are also printed on the "back" with the message, as discussed above. The donor removes the appeal from the envelope, reads the message on one side and checks off the membership renewal information on the other. For the second and third mailings, which do include a separate letter, only the side with the renewal information is printed.

4. The Mailback (Return) Envelope

The return envelope is a size 6¾ envelope with your organization's name and address printed in the center.

Including a return envelope in each renewal mailing will substantially increase your response rate. It is not necessary, however, that the envelope be "Prepaid" or a "Business Reply Envelope" (BRE). These are expensive, and studies show that donors would rather place their first class stamp on an envelope than think your organization is using their donation to pay for costly BREs.

5. The Carrier Envelope

The carrier envelope in this renewal system is a No. 7 window envelope. This No. 7 accommodates the return envelope, the mailback card, and, for mailings two and three, the short letter on half-sized stationery. If you wish, you can print a statement such as "Renewal Enclosed" or "It's Time to Renew" on the outside of the envelope when you have your return address and bulk mail indicia printed. Although slightly more

*The Third Renewal Letter***DES ACTION**

Dear Friend,

Have you forgotten something? Your subscription to the DES Action Voice has expired.

The DES Action Voice is your only source of accurate, up to date information on the DES story. Four times a year, the Voice brings you abstracts of the most recent medical articles on DES effects on mothers, daughters, and sons. It brings you articles by DES exposed people about their experiences, answers to your medical questions by our medical advisors, and updates on legal and legislative matters.

I'm sure you won't want to miss this important information. It is vital to the health of DES exposed people and critical to a thorough understanding of the DES story.

Send your renewal today, and keep up to date on DES.

If you've already sent your renewal -- thank you, and please excuse this extra notice. Our computer probably hasn't caught up with your renewal yet.

If you haven't sent your renewal, please do so today. And thanks for your support.

Sincerely,
Nancy Abess
 Nancy Abess
 Executive Director

P.S. As always, your gift is tax-deductible.

NATIONAL

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expensive than a plain envelope, the window envelope enables you to retrieve the mailing label with the mailback card so that your records can be quickly and accurately updated by your computer or other system.

The Exception—Major Donors

Because major donors are special friends of the organization, they deserve a personalized letter when their membership is up for renewal at the end of the year. This letter can be longer than the appeal message on the renewal card, but needn't exceed one page. It should mention the amount the donor gave last year and ask for "a gift of the same size or larger" this year. You can remind the donor of how important larger gifts such as hers or his are to your organization, and of some of the work that their support enables you to do. (See example.)

In the case of major donors, the return

envelope should have a first class stamp affixed as a courtesy, and to encourage them to mail their renewal right away. It need not contain a mail-back card. Since you have already indicated the amount of the gift you want them to make, they do not need a renewal card on which to check their membership plan.

If a major donor does not renew by the time the second letter is being sent to the regular members, you can either send them a second personal letter or place their name with the others to receive the standard second, third, and final renewals. Surprisingly, many major donors will respond to a standard renewal with the same large gift they would have sent if they had not overlooked the personal appeal.

Results

Followed carefully, this renewal program should increase your member-

ship renewal rates a great deal. If you use the first three renewal mailings in this system, you can expect a 66 percent rate of return. Adding the fourth renewal reminder will raise your response rate to 71 percent or better. If renewals are sent out on time and responses recorded immediately and accurately, there should be little duplication of renewal notices to members who do renew, and a greater chance that those who don't renew with the first letter will do so eventually. Even the final renewal notice, sent to donors whose membership has lapsed for six months or more, usually results in a 5 to 10 percent return rate, and many lapsed members include additional gifts above the renewal amount.

Don't forget to thank your renewing members promptly with a short note or postcard in appreciation of their donation—it will ensure an even higher renewal rate next year!

Donor Letter

DES ACTION

June 19, 1985

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Ohio
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Oregon
Pennsylvania
Texas
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DES Cancer Network
DES ACTION
INTERNATIONAL
Australia
Canada
Netherlands

Dear :

Last year at about this time you generously donated to DES Action's work. We would like you to renew your donation this year, and, if possible, increase your support of DES Action's important work.

Important new medical research shows that DES mothers are at higher risk for breast cancer and DES daughters are more likely to have a pre-cancerous condition called dysplasia. These new studies (as reported in the Winter DES Action Voice) remind us how important it is for DES Action to get this information to all those who were exposed. Only when DES exposed mothers, daughters, and sons know what effects DES has can they get the best possible health care.

As we continue to provide information, education, and outreach to DES exposed people throughout the United States, we are also aware of DES use elsewhere in the world. Through our new International Outreach program, we have made contact with health workers in other countries. They are receptive to our information but, for the most part, very ignorant of problems linked to DES. We must spread our education around the globe so all those exposed to DES will get the special care they need.

To do this, we need your continued help. Your gift of or more will enable us to continue these vital programs. We must keep attention focused on the DES issue until every DES exposed mother, daughter and son is appropriately cared for.

Thanks for your ongoing support.

Best wishes,
Nancy Ades
Executive Director

P.S. Please use the return envelope enclosed to make your tax-deductible donation today.

NATIONAL

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West Coast Office: 2845 24th Street, San Francisco, California 94110 (415) 826-5060

NAEIR: continued from page 11

as allowed under Section 170(e)(3) of the Internal Revenue Service Code.

Membership is open to any non-profit, tax-exempt 501(C)(3) organization within the United States. NAEIR members include every type of non-profit organization, including camps, churches, schools, YMCAs, municipalities, cultural development groups, museums, scouting groups and urban development groups, among many others.

Each member is assessed annual dues of \$350 and, in turn, receives an average of \$4,200 worth of new, free merchandise each year that would usually have to be purchased instead. Four times a year, members are eligible to request the items they need or couldn't otherwise afford from NAEIR's quarterly Gift Catalogs. All merchandise listed is available free of charge to members, who pay only shipping and handling charges.

Typical items listed in the association's current Gift Catalog include abrasives, appliances, arts and crafts materials, automotive supplies, audio/visual equipment, books, computer supplies, electronics, electrical supplies, food service items, health supplies, heaters, lab equipment, hand and power tools, lubricants, maintenance supplies, office supplies, telephones and plumbing fixtures, among hundreds of other items.

NAEIR's unique guarantee means there is absolutely no risk to new members: If, after one year, the value of the material received as a NAEIR member was not worth at least twice the cost of the annual dues, NAEIR will either give a second year's membership at no cost or refund the dues.

For a complete information kit outlining the benefits of NAEIR membership, write: NAEIR, N-P Membership, P.O. Box 8076, Northfield, IL 60093, or call (312) 446-9111.

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Volume One: Number Two (April 1982): The Lisbon Area Community Organization (case study of a small business endeavor); Fundraising Events: Part One: Planning; Use of a Fiscal Agent.

Volume One: Number Four (August 1982): The August Doldrums (How to use slow time productively); Twenty Words That Sell; Fundraising Events (Part Three): Budgeting.

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

Volume Two: Number One (February 1983): So You Want Your Board to Raise Money; Four Months on the Road for Peace (a trainer's experiences around the country teaching peace groups to raise money); Record Keeping (Part Two): Research.

Volume Two: Number Two (April 1983): Getting Over the Fear of Asking (a series of group exercises to help people get over their fear of asking for money); Evaluating Your Board of Directors; Ideas for Expanding Your Mailing List.

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Volume Three: Number One (February 1984): Cash Management for Smaller Non-Profit Organizations; Using Phonathons for Renewal; Free Advice for a Price (how to hire and use a consultant).

Volume Three: Number Two (April 1984): Personalizing Fundraising Appeals; Computers for Non-Profits (Part One); Setting Up a Canvass (Part One).

Volume Three: Number Three (June 1984): Computers for Non-Profits (Part Two); Setting Up a Canvass (Part One); Fundraising Luncheons (Part One).

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Volume Four: Number Two (April 1985): The Lord Loveth a Cheerful Giver (Designing and Maintaining a Pledge Program); The Membership Brochure (Content, Writing and Graphics for effective brochures).

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