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Grassroots

Fundraising

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**In This Issue:**  
The Seven Deadly  
Sins, Part Two;  
The Logistics of a  
Major Gifts  
Campaign;  
Profile of a Major  
Donor

Journal

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

**Copy Editor:** Nancy Adess

**Subscription Services:** Leanne Bynum

**Contributors to this issue:**  
Andrea Ayvazian & Kim Klein

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### A Letter From the Co-Editor Kim Klein

As many Journal readers know, as of this June, I am living in Knoxville, Tennessee. Some readers have inquired how that move affects the Journal. Rest assured—the Journal will continue to be published on its regular schedule. I will be as involved as I have ever been. I have moved to Knoxville to continue my fundraising career and to get a taste of living in the South and the East. I grew up in Colorado, and except for a short stint at college in Wisconsin, have only lived there and in California. Lisa Honig and I will continue to work together, and we both feel that the new experiences I will be having will be helpful to the Journal. Through the end of 1986, the address for the Journal will remain the same. A new phone number for the Journal will be published in our August issue. **KK**

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**Note to Our Readers:** Part Two of our Marketing series was to have appeared in this issue, but will appear instead in the August issue. We apologize for this inconvenience.

Also, some readers have noted that the December '85 and February '86 issues of the *Journal* had mechanical difficulties in the binding or printing processes. This resulted in a small number of *Journals* having blank pages or illegible type, or pages cut in half. If you find any production problems in your copy, simply return the damaged issue to us and we will send you a good copy.

*Part Two*

# Organizational Development:

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## The Seven Deadly Sins

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by *Andrea Ayvazian*

*Andrea Ayvazian is director of the Exchange Project, the technical assistance program of the Peace Development Fund (Amherst, Massachusetts). In the last issue of the Journal we reprinted the first part of her booklet on dealing with the organizational issues that arise as groups move from the "kitchen table/church basement" stage into their maturity. We print here the conclusion of that discussion, covering the problems of No Clear Lines of Accountability, Poor or Non-Existent Office Systems, and Horrendous Meetings.*

### **Problem No. 5:** **No Clear Lines of Accountability**

**I**n some cases we have become so alternative—we want to do everything differently—that we have thrown out all trappings of hierarchy for good or for bad. Sometimes when we lack structure we are doing ourselves a disservice, because often people do not know what, in the end, they are responsible for, and to whom they are accountable. Not, that is, until something has gone wrong. When a disaster hits, everybody turns around and says, "You didn't do what?" and you realize that the project was in your lap.

We need not be so afraid of hierarchy. It can be a relief for people to know whom they answer to and what they are responsible for. When you delegate responsibility say, "This is what we're counting on you to do, from start to finish," give the task away, and let the person be totally

responsible for its completion and success.

When lines of accountability are clear, it is also important to give people feedback when you feel they have stepped outside their bounds. If people are only going to know what's clear when they err, it decreases risk-taking. People do not want to risk being wrong, so they don't risk anything at all. When you know you have some power in a certain area, it can increase creativity.

### **Problem No. 6: Poor or Non-Existent Office Systems**

**I**nadequate record keeping and poor internal communication contribute to frustration and inefficiency. I once asked to see a group's financial files and records, and they pulled out an entire file which simply said, "1982." Nothing was subdivided. Every receipt was in there—a bulging file of receipts and notes and scrawls. That is an extreme example, but it is one of several on a continuum of ineffectiveness. For every event, you need to write down what happened, the key things you learned, and the evaluation. You need files on donors. You need samples of your past work so you can re-use graphics and see what ideas worked well. The list goes on and on. The point is: document your work and keep detailed files. It is also your group's history in that cabinet.

Communication is another important item. There are groups where you cannot even be sure that someone you call will get the message that you phoned. I have had to call back three and four times because people have never been told I called. "Oh, you called before?" they

# Make notes. It makes life easier. It is time well spent.

say. These are the things that contribute to burnout. You keep having to do the same things over.

Documentation of our work helps us as individuals, too—it combats our feeling of being indispensable. If you could say, "Pull the file on Mr. Brewster. Read over my notes from last week's conversation and please make the follow-up call," then you can let that task go to someone else, because it is all written down. The more you carry in your head, the more you are making yourself indispensable and minimizing the work of others. You are doing the group a disservice and leading yourself to burnout. Make notes. It makes life easier. It is time *well spent*.

## Problem No. 7: Horrendous Meetings

**W**e have to accept the fact that the work we are doing gets done in meetings. We do not sit isolated in offices, we are not academicians, most of us, who write things and send them off to the publisher, we are not corporate executives making unilateral decisions. We do our work in meetings. We strategize, we socialize—we meet. But we are attending and running horrendous meetings—meetings that are long and boring, with overpacked agendas, or no agendas at all. It is amazing to me to see some of the things people expect to accomplish in one meeting.

Stop exhausting yourselves and the people who come to your meetings by packed agendas and poor facilitation. Stop attending horrendous meetings and stop running them. The keys to stop running horrendous meetings are: Make some piece of it fun, have agendas that are realistic, and attempt to do fewer things better. Have committees that really get work done on the committee level and report back to the larger group: "We checked out this, this, we still are nowhere on this." "Thank you. Can you tell us more about it next time?"

Have fewer meetings. Have some meetings that go for

a longer time, perhaps a day. Get out of the office, or out of the home and take a picnic or a pot luck lunch. Start and end your meetings with fun things. I am sure there are more creative answers, but the bottom line is this: stop running horrendous meetings and stop going to them.

If you can send out an agenda prior to the meeting, you start light-years ahead. People know what to expect when they arrive. They may even have talked to each other about some of the items. That can be very useful. An agenda created on the spot, at the meeting, tends to be huge. People don't stop—they just add item after item and then spend forever prioritizing the list. Just creating the agenda consumes the bulk of the evening. I always want to go home feeling, "That was a good meeting! We accomplished a great deal and had a good time doing it." You can have a subcommittee that creates the agenda. Leave time at the end for items that did not get in—five minutes per item at the most.

Finally, end on time. It feels good to know that a 7:30 meeting will end at 9:30 and you will be home by 10:00. Now, when meetings go longer than they are supposed to, I leave. That is living up to my responsibility to take good care of myself. I will not stay if I'm getting tired, my input is only going to be rote, and I'm going to be resentful.

## Conclusion

**O**rganizational development is perfecting the means by which we reach our goals. It means getting serious about our work—wanting to do this work more effectively and more efficiently. We must pay attention to these internal issues. We also must honor the fact that beyond the obstacles, the glue holding us to our work is not only the commitment to our beliefs but also the dedication we feel toward each other.

When I travel, I ask activists to tell me the single greatest strength of their peace group. Invariably, people respond that it is the commitment of the people with whom they work and the vision of their colleagues. ■

**ERROR:** In the February, 1986 issue of the *Journal*, in our article on Raising Money From Churches by Gary Delgado, we gave readers a piece of wrong information: The Women's Technical Assistance Project publishes a booklet called "Resource Guide to Church Fundraising." This booklet is \$20—not \$5 as listed in the *Journal*. It is well worth the price. The *Journal* regrets the error.

**T**he woman interviewed for this profile is in her late fifties. Married three times, she has been single again for the past ten years. She gives away \$50,000 a year, which is half of her interest income from a large inheritance. She lives on slightly less than \$35,000, and gives each of her children some money.

Her main interests are peace and anti-nuclear work, with strong commitments also to environmental and children's programs. Her giving is eclectic, and until this interview, she had never really thought about what strategies she responds to best, and what she does not like in fundraising. She has done some fundraising herself, mostly from wealthy friends through personal solicitation.

Asked how she feels about direct mail, she answered that she gives "thousands" away in gifts of \$50 and \$100 through the mail. How she decides what group to respond to depends on how much mail she receives that day, and what kind of mood she is in when she opens it. Generally, if she doesn't have too much mail, and she is in a good mood, she responds to appeals that put their message right on the envelope. She doesn't want to have to open the letter to find out who it is from. She only reads letters from groups that put their name and address right on the front of the envelope. She doesn't care how long the letter is because she rarely reads it.

The only part of the letter she always reads is the return form (reply device). She looks at how much money the group wants and reads the summary of what they are doing (i.e. "Count me in on the fight against redlining" or "Yes, I want a bilateral and verifiable nuclear freeze now") and makes her decision accordingly. Though she gives most of her gifts by mail, her biggest gifts are in response to personal solicitation.

On being approached in person, she says the most important thing is for the solicitor to be genuine and straight-forward. She says, "I don't know which

## Profile Of A Major Donor

I hate more: obsequiousness or manipulation."

She relates a story of a woman who got her name from a mutual friend. The woman approached our donor on behalf of a Central America solidarity group—something this donor totally supports. The solicitor met our donor at the donor's home, and first complimented her on her good taste in rugs, furnishings, artwork, etc. Unfortunately, our donor was renting this house while her own house was being remodeled. She says, "Everything in the house was like from a Howard Johnson's motel. The house was made for people who need a place for two or three weeks, so it was completely furnished without taste." She goes on, "However, I thought this woman perhaps actually liked that kind of decor, so I said nothing. The woman then went into a fit of praise about my clothes, and my earrings, and thanked me for dressing up to see her."

At this point, our donor interrupted to ask what the solicitor wanted. The solicitor then went "into ecstasies about what my friend had said about me, and how committed I was, and how carefully

I spent my money, and could I therefore consider, relative to my ability, a small amount, something in the neighborhood of \$5,000." Our donor turned the woman down, and then proceeded to coach her about her approach.

In another case a man approached her for a gift to a daycare center which was doing very creative things with children from low income families. He tried the "manipulation tactic." He kept saying, "You do love children, don't you? You do think every child has the right to a decent education, don't you?" She recalled, "He was forcing me to say yes to everything, which I willingly did. When he asked me for \$500, I again said yes, but told him he could have saved a lot of time and agony by not using these silly tricks. He confessed that he had read how to do that in a book."

Her advice to fundraisers is simple: let the cause speak for itself. Assume that the prospective donor is an adult and can make up his or her own mind without coaching. She also adds, "If you hate rich people, don't ask them for money."

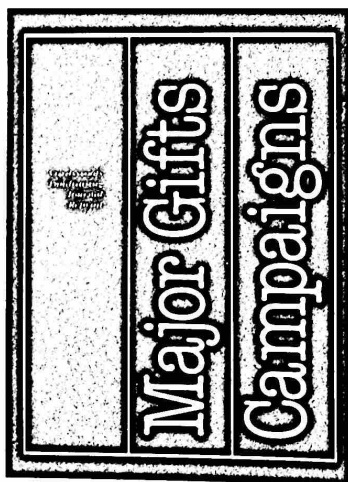
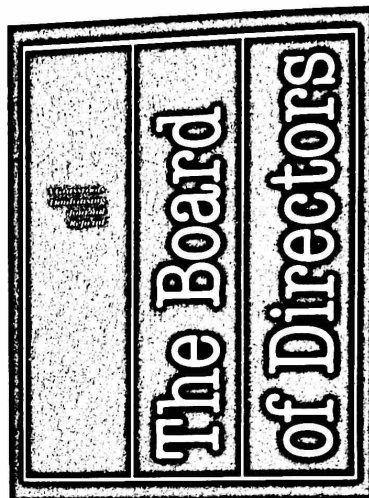
She talked candidly about being a person of inherited wealth. "I have more money than I need, or perhaps than I deserve. I am trying to be very responsible about that. I am too cowardly to simply give it all away, and I am not sure that is a good solution, although some of my friends have done that. All I want is for people to respect that I am doing my best with what I have—I mean what I have as character attributes, not just money. It is certainly easier to have money than not to have it, and I don't romanticize being poor. It's also true that having a lot of money, when so few people have that privilege, brings its own problems and challenges."

This donor is typical of many in her desire to be treated honestly. She points up again the need to simply present the cause, ask for the money, and wait for the answer without judgment of the prospect.

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# Conducting A Major Gifts Campaign

In the past issues of the *Journal*, we have discussed at length why people are afraid to ask for money, how to identify prospects for larger gifts, how to solicit the gift, and how to set a goal for a campaign. Certainly lack of knowledge about how to identify people to ask and discomfort with the process of asking for money are the biggest barriers to the successful completion of a major gifts program. However, once a group has mastered the process of asking and has begun to identify those people who should be asked (prospects), the organization is ready to move from a major gifts program to a more formal *campaign*. This article discusses how a grassroots group can conduct such a campaign, focussing on each step of the logistics.

The primary difference between a campaign and an ongoing major gifts program is that a campaign is time limited—it begins and ends at specified dates. During that period, a few volunteers devote themselves intensively to meeting a specific financial goal, giving amounts of time and effort to the campaign that would be difficult to maintain beyond a short commitment. So, the primary components of a major gifts campaign are: 1. time-limited; 2. a few intensively involved volunteers; and 3. a specific fundraising goal.

In contrast, most grassroots groups have ongoing major gifts programs. They engage in major gifts solicitation informally throughout the year. While the groups may set a goal to be raised from major gifts, they will not stop when they reach the goal, nor is the goal necessarily made

public.

The purposes of doing a time limited campaign instead of a year-round program are to involve more volunteers, to get more publicity for the overall needs of the organization, and usually to solicit larger individual gifts.

A major gifts campaign requires 9 steps, some of which are the same as for any major gifts program. These steps are listed below, with those that would be the same for an ongoing program noted "same". Following, we will discuss each step. The steps are:

1. Set a goal for amount to be raised (same) and length of campaign
2. Identify and train solicitors
3. Identify prospects (same)
4. Prepare supporting materials
5. Assign prospects and solicit gifts (same)
6. Kick off the campaign with a special event\*
7. Hold regular reporting meetings to discuss progress and boost morale of campaign volunteers
8. Celebrate the end of a successful campaign with a special event\*
9. Thank and record donors and incorporate them into ongoing fundraising efforts.

\*Optional, though can attract media attention and recognize donors.

## *The Steps in Detail*

### 1. Set a goal.

The first steps in a major gifts campaign are to decide

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how long the campaign will last and how much money the campaign is to raise. For small organizations, a campaign of three months is ideal, with four months a maximum. To determine a fundraising goal, calculate how much you should be able to raise given the number of volunteers you have. Generally, a volunteer can ask five people a month for three months without undue strain. So, a committee of five volunteers would be able to ask 75 people during three months. Assuming a usual (but conservative) 50 percent rate of success from face to face solicitation, your group would have 37 or 38 new donors after such a campaign. If you have a shortage of volunteers, ask each volunteer to solicit more people per month.

Knowing how many gifts you can get, then you need to plot how many gifts of what size will get you to your goal. First, select the lowest amount from a major gift that will be solicited in face to face meetings. Most groups select \$250 as the minimum gift, but many choose \$100. (Rarely would it be worth the effort to make face to face solicitations for less than \$100.) The final choice of the lowest gift depends to a large extent on how many major gifts your group has received to date, and how experienced or comfortable your solicitors are.

Next, determine what your largest gift will be. A rule of thumb is to make the largest gift 10 percent of the total goal. With the largest and lowest gifts decided on, you can now chart what size gifts you will need and how many of each to meet the goal. A campaign for \$25,000 might look like this:

**Goal: \$25,000**

Gift size	No. of gifts needed	Total
\$2,500	1	\$2,500
1,000	5	5,000
500	10	5,000
250	30	7,500
100	50	5,000
	<u>96</u>	<u>\$25,000</u>

Conservatively assuming a 50 percent rate of rejection, you would need twice as many prospects—or 192 in our example—to ensure meeting your goal of 96 gifts.

To do this \$25,000 campaign, then, you would need approximately 13 people soliciting five people per month for three months ( $13 \times 5 \times 3 = 195$ ), which allows for some people not completing all their calls.

When you make your own gift range chart, don't get too bogged down. There is no scientific way to do it. Basically, the chart is a triangle with fewer people at the top and more people at the bottom. (In a very rural, less



**B**asically,  
*the chart is a  
 triangle with fewer  
 people at the top  
 and more people at  
 the bottom.*



populated area, you might need to have even larger gifts from even fewer people than this chart indicates.) The point of the chart is to recognize that not everyone will give the same amount, and to set a limit on the number of people needing to be solicited. Prospects and donors like this kind of plan because it lets them know that the group has planned its campaign and knows what it is doing.

**2. Identify and train solicitors.**

Invite people to be on the campaign committee, assembling the number of people you need. Committee members should fulfill two simple commitments, with a third commitment optional. First, each member should ideally be a *major* donor. (Groups can decide whether all campaign committee members must be major donors, or whether that would limit participation too severely.)

Second, each member must agree to solicit a certain number of prospects each month for a certain number of months. Third, and optional, is for members to provide names of prospects for the master list. If your committee does not provide these names, then you will need another way to get them.

Once enough people have agreed to be on the committee, set a meeting for them to be briefed about the campaign and taught how to ask for money. The meeting should last about three hours, and will include solicitors choosing their prospects (see step 5).

It is imperative that every person be at this training, even if they have participated in fundraising solicitations before. The experience of people who know how to do it will be of great benefit to those who are feeling unsure. The committee should have a sense of itself as a team, and should develop a strong camaraderie from the very beginning. In addition to teaching people how to ask for money, pass out the prepared supporting materials as described in step 4, and assign prospects as described

in step 5.

**3. Identify prospects.**

Use the prospect forms and identifying methods described in other issues of the *Journal* (see Vol. 2, No. 5, and the *Journal* reprint *Major Gift Campaigns*). Basically, a prospect is characterized by three things: 1. the person has the ability to give a certain size gift; 2. the person believes in your cause; and 3. someone on your committee has some contact with him or her.

To develop a list of prospects, ask members of the committee for names of people, and look in your list of current donors to identify people who have given a major gift, people who have the ability to give a major gift, or people who should be asked to give more this year. (Anyone on your list who has given the same large donation for two or more years ought to be asked to increase their gift, and this campaign provides an excellent way for that to happen.) Unlike an informal, ongoing program, in a campaign, all the prospects must be identified before the campaign can begin. When all the names are in, prepare a master list of prospects as in Example A.

**Example A**

<u>CONFIDENTIAL</u>				
<u>Name and Address/Phone number/Amount to be solicited/Solicitor/Outcome</u>				

Information about each prospect, such as evidence of belief in the cause, record of previous donations, evidence of ability to give, and other personal information is kept on separate cards, not on the master list, and only given to the solicitor for his or her prospects. *All of this information is highly confidential and all solicitors must be people who have a clear sense of discretion and can be trusted.*

**Example B**

<u>Prospect Card</u>
<p>Joe Donor            13 Middle Class Way            Suburb, CA</p> <p>Owns a dry goods store. Has given \$250 for past three years. Also active in another good organization. Strong on environment. Wife used to be on our Board. Now divorced from her, but he is still committed to our group.</p>

If you have trouble identifying the number of prospects you need, take this as a clue either to scale down your campaign, or that you are not ready to take on a campaign and should continue seeking major gifts in a more informal way.

#### 4. Prepare supporting materials.

A campaign needs a number of materials for solicitors to use, some of which will already exist in your organization, and some of which will need to be made up for the campaign. The supporting materials are of two types: a. those that the solicitors will give to donors; and b. those which are for the solicitors' use only, or relate to the campaign committee.

For the solicitor to use with donors, you will need:

- a campaign brochure: the brochure spells out the purpose and goal of the campaign, the gifts that are needed, and the history of the organization. It also invites donors to a celebration at the conclusion of the campaign and tells them what they get for their money. Having special benefits for donors can increase the campaign's success. Such benefits might include an invitation to the celebration, a plaque or certificate of appreciation, specially created artwork for the organization, a special book or special edition of a book, etc. Whatever the benefit is, it should be nice but not cost more than \$5 to \$7 per donor. Many organizations list donors on a brass sheet on the wall, or put their names in the newsletter or even take out an ad in the local paper to thank them (see samples of brochures from two groups: Example C);
- a pledge card: notes the donor's name and what he or she has agreed to give and the method of payment (see Example D);
- stationery, envelopes and return envelopes: enough for



# A

*major gifts  
campaign begins  
and ends on  
specified dates.*

all the prospects and some extras for mistakes.

For the solicitors' or committee's use only:

- a timeline;
- a complete description of the campaign and some soliciting tips;
- a budget of the organization;
- a list of difficult and commonly asked questions about the organization, with possible answers;
- a list of the other solicitors, and who to call for more information.

All of this should be put together in a "Campaigner's Notebook", which can be as simple as a manila folder, but looks nice, has the name of the campaigner on it, and seems official (see Example E).

At the training meeting, each person is given a copy of the materials and all the materials are reviewed. In addition, each person will be given a copy of the master list, and cards on each of their prospects.

#### 5. Assign prospects (and solicit gifts).

After the solicitors are trained and familiar with the materials and the campaign, they are each given a master prospects list and asked to read through it at the meeting and choose which prospects they will solicit. Have them write down their prospects on a piece of scratch paper for the first go-round. After everyone has had a chance to review the list and choose the requisite number of prospects, ask each solicitor to read his or her list out loud. Everyone else listens for duplication. Should two solicitors have the same person on their lists, they discuss in front of the group which of them will take the prospect. (This discussion is not long, usually involving simply: "You take him." "No, that's okay, you take him." "Okay, I'll take him.") Each person reads his or her list until it is clear that everyone has different prospects, and no one will be solicited twice. Solicitation can now begin.

#### 6. Kick off campaign with special event.

Although not imperative, it is often useful to kick off the campaign with a special event. This is not a gala affair, but the press might be invited, as well as all the prospects and all the solicitors. Wine, soft drinks, and hors d'oeuvres should be served, and someone should give an impassioned, enthusiastic, and articulate but brief speech about the campaign, including its goals, the need for the organization, what donors get for giving, and telling all the people at the event that they will soon be solicited.

The event can be educational for prospects, informing them of the need, and reinforcing their commitment to reaching the goal. An event also provides a time for people to see who else is involved, and who is giving—this peer identification adds an important element to the desire to give.

**Example C: Two brochures from two campaigns**

*Folded in half, this attractive brochure was done in purple ink on matte paper  
(Campaign Coordinator: Terry Mendenhall. Used by permission)*

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**Are you committed** to supporting grassroots community action in Western Washington for nuclear disarmament?

**If you believe** in legislative lobbying, public education, direct action and other community based organizing to promote nuclear disarmament, then you'll want to support *Nuclear Xchange*, this region's independent, comprehensive monthly disarmament newspaper.

**That's because** our broad based coverage reaching more than 15,000 readers every month has made *Nuclear Xchange* the primary communications network for the dozens of professional and grassroots disarmament organizations—and thousands of individuals working for disarmament—in Western Washington.

**Here's why** this region's progressive community needs *Nuclear Xchange*:  
 ► Our comprehensive calendar of peace events—the only one in Western Washington—makes us a communications center for

working activists and a bulletin board for public involvement.

- Our circulation of 15,000 paid and free copies every month draws popular support for lobbying and direct action campaigns, and brings new people into active disarmament work.
- We reach the major media in the region, generating coverage for peace issues and organizations.
- We report breaking news, disarmament movement trends, and regional military developments not covered in any other publication.

**We need you!** *Nuclear Xchange* was founded on a grassroots base of financial support: about 95 percent of our income during our first two years has been generated in contributions of \$25 or less.

**We want to build** on this solid foundation of grassroots support. The added financial base of our Major Contributor Program will help *Nuclear Xchange* grow to reach even more Western Washington citizens with information about community based disarmament work.

**When you become** a Major Contributor, either as an Xchange Associate or an Xchange Sponsor, you will be invited to share the *Xchange*'s inside track on regional disarmament issues and trends. We will host several gatherings during the year for you to meet elected officials, regional leaders and other insiders working on key disarmament efforts.

These events will also give you the opportunity to meet other dedicated people who have made a financial commitment to support top quality regional journalism for disarmament, and share your ideas about the paper with the *Xchange* Board of Directors and staff.

**Make the decision** now to invest generously in linking community based disarmament efforts all over Western Washington. Pledge today as a Major Contributor to *Nuclear Xchange!*

Inside of Brochure

**Front of three page brochure launching a tenth year campaign.  
(Campaign Coordinator: Joan Darrab. Used by permission)**

*The phrases "A Decade of Commitment" and "The Women's Center..." were done in plum colored ink and the other letters were gray-brown on a background of gray. The brochure was done on glossy paper. The inside included more testimonials from various important people in town.*



**"The Women's Center...is the kind of effort that's worth as much support as we can give!"**

*Karen Munro, Regional Manager, Continental Cablevision  
Chair, 10th Anniversary Women's Center Campaign*

**Example D: A pledge card, noting the option of giving all at once or as a pledge, and noting all the categories of giving.**

**10th ANNIVERSARY HONOR CATEGORIES**

**PATRONS SOCIETY**

- \$2,000 Chair's Associate
- \$1,500 Trustee
- \$1,250 Benefactor
- \$1,000 Patron
- \$750 Grantor
- \$500 Sustainer

**SUPPORTER SOCIETY**

- \$250 Donor
- \$100 Sponsor
- \$50 - 99 Supporter
- \$25 - 49 Contributor
- \$24 & Under Friend



**TENTH ANNIVERSARY CAMPAIGN**

Women's Center  
A Decade of Commitment  
Chair: Karen Munro

In support of the programs of the  
**WOMEN'S CENTER OF SAN JOAQUIN COUNTY**

I  Contribute  Pledge \_\_\_\_\_ to the Women's Center

Enclosed is \$ \_\_\_\_\_

Kindly bill me  semi-annually  annually  other \_\_\_\_\_  
in the month(s) of \_\_\_\_\_ 198\_\_ and \_\_\_\_\_ 198\_\_

NAME \_\_\_\_\_

MAILING ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ STATE/ZIP \_\_\_\_\_

DAY PHONE \_\_\_\_\_ EVENING PHONE \_\_\_\_\_

SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

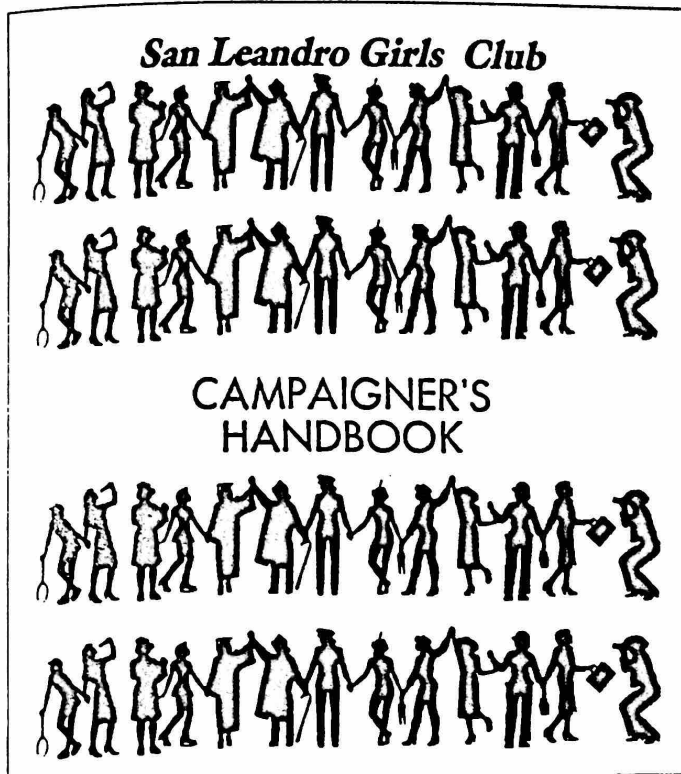
All contributions are tax deductible. Checks payable to:

**THE WOMEN'S CENTER**

Mail to: P.O. Box 7312, Stockton, CA 95207

The Women's Center of San Joaquin County, a non-profit organization, is a United Way member agency

**Example E: The cover of  
a handbook given to the solicitors.**



*The contents of the book included sections called: Why Do We Campaign?; Your Responsibilities; What Does a Person Get For Their Contribution?; Pledging—How and Why; Campaigning Skills and Successful Techniques; Typical and Difficult Questions; A Description of the Organization's Programs; Staff and Board Roster. (Judy Glenn, Coordinator. Used by permission)*

**7. Hold regular reporting meetings to discuss progress and boost morale of campaign volunteers.**

These meetings should take place at least once every two weeks, preferably weekly, during the campaign. The meetings only last 30 to 45 minutes, and many groups hold them over breakfast at 7:30 a.m. The purpose of the meetings is to give everyone a chance to report their progress, which forces everyone to have made some progress between meetings. They can share frustrations, fears, and also successes. A report of the progress to the goal should be made, and any additional materials (brochures, return envelopes, extra stationery) can be given out then as well. For groups in rural areas, weekly or semi-weekly meetings may not be possible, but then some kind of phone check-in is imperative.

**8. Celebrate the end of the campaign with a special event.**

This is optional, but is an excellent way to recognize and reward the committee as well as the donors. A simple wine and cheese reception from 5 to 7 in the evening,

with a speech announcing the successful conclusion of the campaign, is fine. Some groups have formal dinners, or ground-breaking ceremonies, in the case of capital campaigns. It is not necessary to be elaborate—simply gracious, warm, and rewarding to volunteers.

**9. Recognize donors and incorporate them into ongoing fundraising efforts.**

Aside from raising money, the purpose of a formal campaign is to strengthen donor loyalty and increase the number of donors, and the size of donations. To take advantage of that strengthened loyalty and increased gifts, you must have a mailing list in place and a way to have regular correspondence with your donors. They should now receive any appropriate invitations to special events, occasional mail appeals, and, of course, personal letters describing the progress of the program to which they donated.

**Conclusion**

A major gifts campaign is fun and can be very lucrative. To succeed at all, however, it must be done right. Groups wishing to take shortcuts, or feeling that they do not have all the infrastructure in place, should not attempt a formal campaign until they are completely ready and able to do so. ■

See also *Major Gifts Campaigns*, a *Grassroots Fundraising Journal* reprint, advertised on page 6 of this issue.

Advertisement

**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

# Ideas for Expanding Your Mailing List

Organizations which derive a part of their income from mail appeals are sometimes stretched to find new ways to gather names to use for appeals, besides exchanging or purchasing lists. The following are some additional suggestions for acquiring "warm" and "hot" lists for appeals. ("Warm" and "hot" means names of people likely to give through the mail to your organization.)

1. Write to your current donors at least once a year, and ask them to send the names of five friends who would be interested in becoming members of your group. Since most people's friends are like-minded in values and commitments, these names constitute a "hot" list. Some organizations include a box for such names in every issue of their newsletter or in their fundraising appeals.

2. Always have a sign-up sheet at special events, at tables or booths you have during fairs, political rallies, and at community meetings you hold for your organization. This list should simply say across the top:

Name	Address	Zip	Phone
------	---------	-----	-------

Don't promise people that you will put them on your mailing list unless you want to do that. As soon as you have 200 names (the minimum required for bulk mailing), send them an appeal. Don't wait to use these names more than three months as they go out of date quickly.

3. Direct service organizations can appeal to clients and ex-clients, if your policies on client confidentiality don't

preclude this. Appeal for a lower amount of money to low-income clients. Don't



Once you start paying attention to the art of gathering names, more people cross your path.

assume that because people have little money, they won't be good prospects. People who don't have much money may not give as much as a higher income list, but they can still give something.

4. Ask Board members and volunteers for lists of their friends, acquaintances, and relatives. Some statisticians estimate that every person knows 250 people. Although few of us have addresses for that many people, each person close to the organization can probably think of 20-people to approach.

5. In small towns and rural areas, the telephone directory is a good source of names. In an urban area, the phone book is a "cold" list—people who you have no way of gauging potential

interest in your group. In areas where people tend to know everyone in their area, if your group is well known and popular, the telephone directory can be the source of "warm" lists.

6. If your organization sells pamphlets, educational brochures, or other products related to your organizational purpose, the purchasers of these products constitute a "warm" list. If you distribute free information, the names of people requesting information are "warm lists."

7. Make a habit of asking people whom you meet at parties, conventions, workshops and the like, who seem interested in your work for their business card, or ask them to write their name and address in a book or on your calendar. These names can be added to other mailing lists for recruiting new members, or you can send them individual notes with more information and a chance to join the organization. One consultant, who serves on the Boards of two non-profits and travels a great deal, finds that she can gather 30 or more names per trip this way.

## Summary

Once you start paying attention to the art of gathering names, you will find that many more people cross your path than you might have thought. Also, developing this habit among Board, staff and volunteers will ensure that those people in your organization who socialize a great deal, travel, or attend conferences and workshops will be attuned to getting the names and addresses of people who might be interested in your group.

# Back Issues

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**Number 2 (April 1982):** The Lisbon Area Community Organization (case study of a small business endeavor); Fundraising Events: Part One: Planning; Use of a Fiscal Agent.

**Number 4 (August 1982):** The August Doldrums (How to use slow time productively); Twenty Words That Sell; Fundraising Events (Part Three): Budgeting.

**Number 5 (October 1982):** Fundraising in Rural Areas; Advisory Boards: No Miracle Solution; Why Most Benefit Concerts Fail; In the Spirit: Fundraising During the Holidays.

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## VOLUME THREE

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Using Phonathons for Renewal; Free Advice for a Price (how to hire and use a consultant).

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**Number 3 (June 1984):** Computers for Non-Profits (Part Two); Setting Up a Canvass (Part Two); Fundraising Luncheons (Part One).

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