

NOW IN

OUR FIFTH YEAR

Grassroots

Fundraising

Journal

Volume 5
Number 4
August 1986
\$3.50

In This Issue:
Marketing, Part
Two; The Why &
How of Personal
Giving Plans, Part
One; Jobs With
Peace Holiday
Cards: A Plan

KIM KLEIN'S

GRASSROOTS

FUNDRAISING

TRAINING

ON VIDEOTAPE

Kim Klein has 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, 517 Union Ave., Suite 206; Knoxville, TN 37902

Advertisement

We've Seen The Future AND IT WORKS

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

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

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

\$12.00 Individual
 \$15.00 Nonprofit
 \$24.00 Library or Organization
40% off the cover price

Payment enclosed.
 Please bill me.
 I've enclosed an extra \$10 for first class delivery.

NAME _____

ADDRESS _____

CITY _____

STATE _____ ZIP _____

**JOBS
COMMUNITY**

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

In This Issue

- Marketing (Part 2): Knowing Your Donors 3
The Why & How of Personal Giving Plans 7
Jobs With Peace Holiday Cards: A Plan 12

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

Publishers and Editors:
Kim Klein and Lisa Honig

Copy Editor: Nancy Adess

Contributors to this issue:
Kim Klein, Leigh Kunde, Barbara Markoff & Steve Paprocki

© 1986. Please request permission of the *Grassroots Fundraising Journal* to reprint or use this material, except as quotes or part of a review.

Typesetting: La Raza Graphics

Design: Michael Cox

New Address

Send all inquiries to:
517 Union Ave., Suite 206;
Knoxville, TN 37902
or call 615/637-6624

Advertising Rates

For advertising rates and copy deadlines, please contact the *Journal*.

Classified

FUNDRAISING COORDINATOR. Responsible for developing sustainer and donor programs; some foundation proposal writing. Direct mail and computer skills essential. Salary negotiable. Part-time considered. Send resume to Search, Monthly Review Foundation, 155 West 23rd Street, New York, NY 10011.

Marketing Part Two

Knowing Your Donors

In Part One of this series (April 1986), we detailed why marketing is necessary for small grassroots organizations. This is a critical time for non-profits: although giving by the private sector (foundations, corporations, and individuals) is increasing by 8-11 percent every year, to keep pace with federal cutbacks, it needs to increase by 40 percent per year. Furthermore, 85 percent of all money given away by individuals (more than 90 percent of all private sector giving) is from families with incomes under \$50,000, the very segment hardest hit by the current economy. More than ever before, non-profits have to be smarter about how they raise money, clearer with their donors about the need for giving, and more thorough in finding new donor prospects.

Part One outlined a six-step process of marketing for more effective fundraising:

1. Determine who your donors are demographically and psychographically.
2. Use information from the psychographic survey about why they give to keep them giving, and to provide them with opportunities to give more often.
3. Based on who your donors are, identify who your prospects are. Based on why your donors give, get those prospects to give.
4. Use public education, media, housemeetings, canvasses, etc. to turn different segments of the population into prospects.

5. Turn those prospects into donors.
6. Go back to step one.

In this article, we examine the first part of step one—determining who your donors are.

There are three tasks to completing step one:

- Know exactly why your organization exists, what your goals are, and how you intend to accomplish them.
- Survey your donors demographically. Compare who your donors are with who they logically should be.
- Determine the values and commitments of your donors through a psychographic survey. This survey tests donor loyalty, and indicates how to make donors more loyal.

In this article we will explain how to accomplish the first two tasks.

Know Why You Exist

Do not skip over this task. Sometimes organizations having difficulty raising money need a clearer understanding of why they exist more than they need a better fundraising plan or more fundraising skills. To raise money for an organization effectively, Board, staff and volunteers all need to understand and articulate the mission, goals and objectives (called the *case*) of the organization.

The **Mission** is a statement of *why* the organization exists: what need was perceived before the organization existed which caused some group of people to create this agency?

Grassroots Fundraising Journal

From the mission, an organization derives its **Goals**. Goals tell *what* the organization intends to do to fulfill its mission. Goals are long range visions that last for years and years, and describe in broad strokes the solutions the group sees to the problem implied in its mission.

From goals come **Objectives**—*how* this group will accomplish its goals. Objectives are specific, time-limited, and measurable, and are usually revised at least yearly. From objectives come an organization's track record and history—the activities it carries out. Whereas Board, staff and volunteers usually know *what* their group does, and how they do it, they often don't know why, or among themselves have very different views of why they exist. You can't possibly attract loyal donors without being clear about your mission.

A full discussion of how to determine your mission, goals and objectives can be found in Harold Seymour's classic book, *Designs for Fundraising* (McGraw Hill, 1966). The people closest to the organization must know its mission, goals and objectives thoroughly both to find out why donors give, and to encourage prospects to give.

Why Donors Give

Once the case is clear, the organization is ready to consider who they would expect to support their

organization, and to conduct a demographic survey of donors to see who actually does support them.

A committee of two or three people conducts a survey such as the one described below. The Board and staff participate in gathering the information.

First, the committee conducting the survey predicts who *should* be donors by answering a series of questions to help determine what to look for in the actual survey of donors, and as a baseline from which to notice significant differences between the group's self-perception and those of their donors. These are the questions the survey committee answers for itself:

- What beliefs and values would we expect our donors to have? How would they get those values, and how are those values and beliefs reinforced or challenged in the culture?
- What types of people have these values and beliefs?
- How does our group convey our beliefs and our work?
- How do we think we recruited donors up to now? (Mail appeals, special events, canvassing, etc.)

Next, Board and staff complete a demographic survey (see *Sample Demographic Survey*) with their best estimates of what their donors would be like.

Once the leadership of the organization has answered these questions, the committee can administer the demographic survey to the organization's donors. The survey should be accompanied by a letter explaining

Sample Demographic Survey

Please answer the following questions. If you do not know something, write DK; if the question is not applicable, write NA.

1. Zip Code or neighborhood where you live _____

2. How long have you lived there? _____

3. How many people share your house/apt/duplex (*circle one*) with you? _____

4. Your age: under 18, 19-25, 26-35, 36-45, 46-60, over 60 (*circle one*).

5. Your sex M F

6. Your race _____

7. Your ethnic identity _____

8. Do you have children? _____

How many? _____

What are their ages? _____

Do they live with you all the time/part of the time (what part _____)/none of the time? (*circle one*)

9. Are you: Married Divorced Single Widowed Lesbian/Gay (with/without partner).

10. Your income level (*circle one*):
under \$10,000; \$10,000-20,000; \$21,000-30,000;
\$31,000-40,000; \$41,000-50,000; over \$50,000;
over \$100,000; over \$250,000.

11. Your education: High school graduate College graduate Attended graduate school Postgraduate training
What academic degrees do you have? _____

12. Your occupation: _____

13. Do you attend a church, synagogue or other religious institution? (*circle one*)

14. Are you registered with a political party?
 Yes No Which one? _____
Active? Yes No

15. How long have you belonged to our group? _____

16. How did you join? Mail appeal Phone appeal Friend Special event Other

the reasons for seeking the information and that answers are to be given anonymously. (A demographic survey only asks about and analyzes actual facts about people—it does not generally address issues of values and beliefs. The psychographic survey will do that.)

At this point the committee surveys all the organization's donors and learns the demographics of the town for comparison. (To find local or regional demographics, consult the Census Bureau, Chamber of Commerce, and other groups which have done similar surveys. A national group would need to get similar demographics; a reference librarian can help with this.) Comparing the profile you get from your demographic survey with that of your city or town lets you see whether and how the make-up of your group differs from your population base.

Most groups eliminate from the demographic survey Board members, volunteers, staff, and anyone very close to the organization who is also a donor. They survey those people who give mostly by mail, and who are for the most part personally unknown to the majority of the leadership.

The sample demographic survey includes questions that may only be relevant to certain types of organizations. Choose the items most relevant to your donor population.

People generally prefer to mark a category than give a specific answer, so as much as possible include categories (such as income ranges) rather than asking for a specific answer (what is your income).

Different organizations will have different percentages of response on the survey. Some specialists believe that you need a certain percentage of response to have an accurate perception of your donors. However, much depends on how many donors you have to begin with. If you have 200 donors, you will need at least a 20 percent response to have a significant body of information to go on. On the other hand, a group with 200,000 donors will be unlikely to get 20 percent response and would have enough information from a much smaller sample. Your response tells you what the demographics are of those donors *who respond to mail*. To round out the picture, you will need to phone some of your donors. You can simply ask them if they have seen the survey and if they have responded. If they have not, ask if you can take the information now. Reassure the donor that you are a surveyor and will not be recording their name or any identifying data.

Compare the results of your survey with your predictions. Note gaps, surprises, populations that are underrepresented, or types of people you didn't expect. Here is an example to show what this part of the process can teach an organization.

A hospice program in a midwestern town of 150,000 people conducted a demographic survey such as the

one outlined opposite.

Their internal survey came out as follows:

Beliefs and values our donors tend to have:

- A person should be able to die at home if he or she chooses.
- Every family should be able to have a terminally ill family member at home, with access to the support services needed to make that possible, regardless of their ability to pay.
- People can die with dignity, and they can live until they die.

How they would get these values:

- Reading Elizabeth Kubler Ross, Cicely Saunders (the founder of the hospice movement) and the like.
- Personal experience with the terminal illness of a friend or family member.
- From their religious beliefs.

How these values would be supported or challenged by the culture:

These attitudes would mostly not be supported by the culture. They would be challenged by:

- The medical establishment, which promotes hospitalization and does not generally favor keeping a terminally ill person at home.
- The general fear, anxiety and avoidance of death as an issue.

What types of people have values and beliefs that would cause them to give to the hospice?

- Quakers and people of other particular religious orientation (for example, some liberal Protestants).
- Psychologists, social workers, clergy of certain denominations.
- People who believe in the integrity and importance of the family.
- People over 65 and middle aged people with older parents to whom they are close.
- Teachers of elementary and junior high schools.
- Others using our services.

How does our group convey our beliefs and our work?

Through direct mail, brochures, and press releases, coverage in local newspapers, and appearances on some radio talk shows. Also a quarterly newsletter keeps people up to date.

How have we recruited donors up to now?

Mostly by mail (more than 75 percent), some through services provided to client families who remained donors after the death of the client, through word of mouth, and through Board member efforts (at most 4 percent).

What will the demographics of our donor population be?

Most donors will be white, professionals, in the

\$30,000-50,000 income bracket, married with children, with as many men as women. Our donors will be college educated and a significant percentage will have graduate degrees. More than half will be active in a church or other religious institution. (This profile also conformed to the profile of the town's population.)

The results

Of 1,000 donors surveyed, 200 completed the demographic survey, and an additional 50 responses were taken by phone.

Most of the donors were women (75 percent), and the most common profession was "homemaker" (25 percent). No other profession was commonly mentioned. Occupations included self-employed plumbers, teachers, janitors, clericals, middle managers, small business owners, and retired people. All the respondents had completed high school, but only 20 percent had attended college, and very few had graduate degrees.

Futhermore, at variance with both the organization's prediction and the town itself, only 50 percent of the donors said they were religious, and only 50 percent of those people reported church attendance.

The average income was lower than predicted, with most donors in the \$20,000-30,000 range.

The group was correct in predicting strong family commitments. Most were married (75 percent) and more than 90 percent had children or grandchildren.

Most of the donors had heard of hospice through the

newspaper or radio, and 50 percent had heard and joined because of other volunteer work. Only 23 percent had joined from a mail appeal. Most had written to hospice first, then received information and a request to join. About 15 percent had become regular donors after giving a memorial contribution.

Many conclusions can be drawn from the differences between the predicted and actual response. A major conclusion for fundraising purposes is that this hospice was well known and respected among other non-profits, but was not reaching professional people who did not volunteer in the non-profit world. The hospice had also surfaced many people who did not fit the profile of the town in their religious commitments, but probably also had great potential with the large religious majority.

Education was also not a major factor in the current donors' backgrounds, and only a minority had indicated personal experience or religious beliefs. These factors pointed to a strong need for a psychographic survey to learn where current donors got their values and beliefs.

Conclusion

Once the group has completed and analyzed the demographic survey, it is ready to conduct a psychographic survey. This is a more in-depth personal survey, and is generally given to fewer people. In our next issue, we will discuss how to conduct a psychographic survey of your donors.

KIM KLEIN ■

Resource for Activist Nonprofits and Professional Fundraisers Alike

Public Media Center of San Francisco has announced publication of its *Index of Progressive Funders*—a national directory of more than 130 foundations, trusts, church groups, funds, and individual givers who make grants to advocacy and social change organizations.

The *Index* reports on grants totalling over \$100 million in such areas as nuclear disarmament, the environment, labor, economic development, and women's issues, civil rights, etc.

The volume is cross-referenced by subject matter and includes a special section on religious funding organizations, as well as a bibliography of other periodicals useful to activists, academics, and professional fundraisers.

The *Index of Progressive Funders* is available only by prepaid mail order from Public Media Center, 466 Green St., Suite 300, San Francisco, California 94133. Purchase price is \$40 for nonprofit groups advocating progressive social change, and \$50 for other institutions and individuals (tax and shipping included).

Programs funded by grantmakers cited in the *Index*

include programs focusing on the following:

Children	Hispanics
Housing	Environment
Occupation Safety & Health	Alternative Media
Blacks	Health Care
Plant Closings	Native Americans
Gay & Lesbian	Voter Registration
Toxic Wastes	Nuclear Power
Prisons	Central America
Asian Americans	Reproductive Rights
Tax Reform	Youth

"We believe charitable givers and grantees alike will benefit from the *Index*," said Herbert Chao Gunther, Executive Director of Public Media Center. "Most of the material it contains is not readily available in any other form."

Public Media Center is a nonprofit advertising agency and communications firm specializing in public interest media campaigns. The agency also provides other technical assistance to nonprofit groups.

Part One

The Why and How of Personal Giving Plans

by Steve Paprocki

In our current series on marketing, we are emphasizing the need for groups to "work smarter, not harder." Part of that for many groups in the next few years will be figuring out how to convert people into givers. Many people don't support your organization because they don't support any organization. Further, many people who give to non-profits do not give systematically, nor do they give what they could truly afford. Steve Paprocki has developed a system for helping people take control of their philanthropy. We believe this article will help groups with the process of turning people into givers—then you can begin to turn them into givers to your organization.

In 1983 American taxpayers with less than \$100,000 annual income contributed over **\$28.8 billion**. That same year combined giving by all the corporations and foundations, plus people with annual incomes over \$100,000 and dead people only totalled **\$20.6 billion**.

Yet when we think about the major forces in philanthropy, we think about foundations. When we read about the "big gifts" of 1985, we think about people with incomes over \$100,000. When we hear about how much money "Hands Across America" or the Olympics have raised, we think about corporate donors.

Two things are clear: People who earn less than \$100,000 per year don't put out press releases whenever they make a donation. More important: As a group, low and moderate income philanthropists have not been organized to support common agendas. Even those charities which are largely supported by these donors (such as the United Way) are actually managed by people with incomes over \$100,000 and representatives of major corporations.

Unfortunately, there is very little control of these charities by low and moderate income donors. In the donor-sensitive world of non-profits, a little donor organization would go a long way to have an impact on the charities these donors choose to support.

More to the point, low and moderate income donors are seldom organized in their personal philanthropy. Most donors have a few gifts they feel they must make each year (alma maters, churches, United Way), and others have some sense that they enjoy giving to one or another type of group (wildlife protection, funds for children). But for most individual donors, organizing

Introduction

Which group gives more?

- A. Businesses and corporate giving programs
- B. Foundations
- C. People with less than \$100,000 annual income
- D. People with more than \$100,000 annual income
- E. Dead people (through trusts, bequests, insurance policies, etc.)

According to the American Association of Fundraising Counsel's *Giving USA, Annual Report 1985*, the answer is C. In fact, people with less than \$100,000 annual income give more than all the other categories combined.

personal philanthropy is a distant and questionable process. They don't realize that they are giving up more than money. They are giving up an opportunity and a right to make the world what they want it to be.

Why is Personal Philanthropy Disorganized?

First, personal philanthropists are disorganized because they are ashamed of the little amount they give and they don't like to talk about it. Organizing personal philanthropy requires talking about it.

According to the Internal Revenue Service, most Americans with annual income under \$100,000 give approximately two percent of their annual income, or between \$400 and \$1800 per taxpayer. These amounts pale miserably in comparison to the multi-million dollar gifts from rich people and their foundations to colleges, art institutions and other major charities.

Second, personal philanthropists are disorganized because they are disillusioned about charities and they don't know where or how to start a well-informed and well-organized personal giving program. One example might highlight this point.

At the height of the fundraising campaigns on behalf of famine-stricken Ethiopia, a middle income couple sent the largest donation they had ever made to a Christian relief service which they believed would spend the money on food and shelter for starving East Africans. Two weeks later, their local newspaper reported this very relief service spending 90 percent of its contributions for evangelical purposes, and only five percent on food and shelter. The contributing couple felt both outraged and powerless. They had unwittingly given to a right-wing evangelical church and couldn't do a thing about it.

Third, personal philanthropists are disorganized because they are overwhelmed by the sheer number of charities; written materials from non-profits begin to disintegrate into one look-alike mass of paper and causes, and it becomes too much work to sort it out.

In the last 25 years, the number of 501(c)(3) organizations has more than tripled. There are now nearly 800,000 organizations recognized as tax-exempt by the IRS.

Many of us constantly receive direct mail solicitations from a large number of these organizations. And they all seem to look the same. We're asked to make donations of "\$25, \$50 or other \$_____"; to join "The Founders' Club, the Sustainers' Club or the President's Council" and to contribute to a cause "which can't wait" or "will end poverty, hunger or other _____ by the end of the decade."

With so many seemingly look-alike organizations soliciting gifts, it's no wonder that individual donors do not take the time to figure out who is who and to whom they should give.

Is There a Way of Organizing Personal Philanthropy?

Of course. With some concentrated effort to examine your visions for the world, learn which organizations share those visions and evaluate how well they are doing their job, you can regain control of your philanthropic decisions and have a real impact on the creation of the future.

Using the same basic process by which foundations and corporate donors establish their giving programs, you can organize your personal philanthropy in a group or by yourself in four evenings.

It is more effective and more enjoyable to work out a personal philanthropy plan with family, friends or neighbors who share at least some of your ideas about what the world should be. In addition, you may wish to combine your financial resources with others to produce a more effective philanthropic tool. The plan outlined below is designed to be used by individuals or groups.

The process presented here is both extensive and thorough. Feel free to use as much or as little of it as you wish. The most important thing is to get yourself organized.

The First Night: History and Inventory

Setting a Preliminary Budget

First, set a starting amount. To do this, look at your past performance—get out your old tax returns or your old check register and determine how much you gave in the past one or two years. What percentage of your income was that? The IRS says most taxpayers give a little more than two percent of their income to charity. What's two percent of your income?

Alternatively, you can choose any old number as a starting point for your giving budget. What do you think you can afford? Don't set it too high or you will set yourself up for failure and disappointment, and perhaps even disappoint a charity to whom you've innocently pledged next month's rent.

Next, subtract the amount of contributions you know you will be making this year, such as "obligatory" contributions to church and United Way.

W*ith*
some concentrated
effort...
you can have a
real impact on the
creation of the future.

What you have left is a preliminary philanthropic budget.

Examining Personal Giving History

- Make a list of the charities and causes to which you contributed in the last year or so, the amount you contributed, the purpose of the program and how you were asked to give.

- Mark the contributions you felt really good about and why. Here are some reasons people feel good about their contributions to charities:

The organization itself; the cause/concern; the people asking; the way you were asked; the effectiveness/efficiency; the methods (education, advocacy); the location served; the administration; the people served, or an undefined charm.

- Mark the contributions you felt you had to make (this doesn't necessarily mean you didn't like the group—just that the gift was more or less mandatory).

- List the three best contributions you ever made and why.

- List the three worst contributions you ever made and why.

- Finally, list the organizations for which you really enjoyed volunteering both a long time ago and recently, and why you enjoyed the volunteer experience (for example: the people, the cause, the things you learned, it paid back a personal "debt", the cause affected you).

Taking Stock—Giving Parameters

In this part of the process, you will look at your charitable giving from a number of different viewpoints.

- List the causes/issues/concerns to which you really enjoy contributing, such as arts, education, church, women's rights, peace, youth recreation.

- List the type of people to whom you really enjoy

contributing, for example: kids, social activists, artists, the disabled, students, neighbors.

- List the geographic areas you enjoy supporting with your contribution, for example: our neighborhood, inner cities, the ocean, Ethiopia.

- List the type of activities/methods to which you enjoy contributing, for example: advocacy, education, direct service, research, communications, arts.

- List the administrative characteristics you enjoy seeing in organizations to which you contribute, for example: good annual reports, board elected by the members, low fundraising/administrative costs, famous board members.

- List the methods by which you enjoy being asked to contribute, for example: direct mail solicitation, special events, personal solicitation.

- List the indicators of success/effectiveness/efficiency which you feel a soliciting organization must exhibit, for example: number of people cured/treated, number of members, legislation passed, dollars saved.

- List the other elements or characteristics you enjoy seeing in organizations you support, for example: enthusiastic volunteers, self-help approach to problem-solving, innovative approaches to old problems.

- Finally, list:

- A. The types of organizations you enthusiastically support

- B. The types of organizations about which you feel ambivalent

- C. The types of organizations you do not wish to support

- List any clearly discernible patterns from these questions.

Establishing the Vision

The patterns you have discerned in the preceding step will be helpful in this next part, but more important are your own instincts and feelings. To establish your philanthropic vision, answer three "easy" questions:

1. Three things I want the world, the U.S., my state, neighborhood to be because of me.

2. Three things I want my friends, family, acquaintances or other people in the world to be because of me.

3. Three ways I can use my philanthropy to achieve these things.

With these questions answered, you have completed the first draft of your personal giving plan.

The Second Night: Learning How and Who

To be an effective philanthropist, it is not necessary to learn how the Ford Foundation gives away \$113 million

annually, or even how the Women's Funding Alliance gives away \$30,000 annually. But some sense of how people give their money away will help to organize your own information and thinking.

There are only three basic elements to learning how to be an effective philanthropist: 1. the process: how to give your money away; 2. the product: to whom to give your money; 3. the result: what is to be achieved.

Without going into any detail, here's one way of looking at how people give their money away. Please note that many processes, instruments and products overlap.

The Process: How People Give Their Money Away

Donors place an emphasis on:

- Who's doing the asking—a friend, boss, relative, or implied authority (minister, congressperson); or people who elicit strong emotional appeals, such as children, animals.
- The way they were asked—personal solicitation, invitations to fundraising events (such as bake sales), or with threats (such as a remark on a personal record).
- A specific call to action—a specific emotional response, such as guilt or shame, or a specific self-interest, such as money or future.

Some donors don't place emphasis on anything—they give on a whim, while others may care most about a previously designed plan.

The Product: To Whom Do People Give Their Money

Donors place an emphasis on:

- Who's being served—children, the poor and powerless, neighbors.
- Who's doing the serving—that is, the organization doing the work.
- Characteristics of the server—administrative and fundraising costs, effectiveness and efficiency of service, people on the board/staff of the organization.
- Methodology of the organization—empowerment/self-help; research/data gathering; education (including exposure, consciousness-raising); advocacy and service; treatment; recreation; counseling; provision of basics such as food, shelter, clothing, money; etc.
- Specific issues—such as handgun control, the environment, peace.
- Broader issues, such as religion, education, culture, health, science, social science, public welfare.
- The project of a serving organization, such as specific legislation, organization building, buildings and equipment.

The Result: What Is To Be Achieved

Donors place an emphasis on:

- Maintenance—of organizations (endowments, capital fund drives); people (social services, treatment); ideas/beliefs (churches, political action committees); things past (museums).
- Development—of organizations (seed grants, challenge grants); people (self-help organizations, scholarships and schools); ideas/beliefs (research, political movements, advocacy).
- Elimination or reduction—of diseases, poverty, powerlessness, the threat of war, discrimination or biases against certain people or animals.
- Self-aggrandizement, such as buildings named for donors, public and visible gifts.
- The dreams of others—leadership development, elections, scholarship funds, assistance to established leaders.

Once you have established some parameters of process, product and goals, it will be much easier to check out the players in your community. The best way is to ask someone who already knows—fundraisers, friends who work in the non-profit world, foundation people, other donors, and consultants are all knowledgeable about the non-profit world.

If you decide to hire a part-time consultant, be sure they are familiar with giving processes, share your basic political leanings, are familiar with non-profits in your giving areas, and are trustworthy (can they keep your secrets?).

You can also start with your own or a friend's information, or do your own research on the non-profits in your community by reading about non-profits in the library or in the public media, particularly daily newspapers. However, these sources usually yield either too little or inaccurate information. Even foundation libraries are set up for people who already know about non-profits but need to get specifics. They won't be very helpful to the beginner.

When consulting with friends or professionals knowledgeable about the non-profit world, learn what you can about the following aspects of non-profits.

- Who's doing what currently? Are there organizations and people whose visions mesh closely with your own? Are there organizations which basically meet your giving parameters? Are there organizations not entirely in line with your thinking, but which are intriguing and worth extra research?
- How do these organizations operate? How do they do what they do? What does it cost? What's the future like? What are their long-term goals? How good is the leadership and the staff? What projects are they working on currently? How realistic are the goals and objectives of these projects? Is there room for more people? For new leaders?

A Few Words Of Caution

As you gather information and begin your giving:

- Watch for "donor hunger." Too often donors will expect a plethora of data or statistical analysis which may not mean much to the organization, but seems highly significant to the donor. Think about your relationship with IRS before you disregard a taciturn organization. Sometimes donors want assurances that their money will be spent in such and such a manner. This is another form of "donor hunger" and it's insidious because a weak (or starving) non-profit executive may give the donor what the donor wants, regardless of what the organization needs. Such a donation harms rather than helps the organization.
- Keep a low profile. Very often, especially in smaller organizations, an inquiry from a donor is misconstrued as perfunctory prelude to an already determined gift. Do not make any promises, however vague and seemingly safe, in the first inquiry. In addition, a high profile will usually buy the donor more power than the size of the gift warrants. Remember you're not buying influence, you're contributing to the efforts of a non-profit.

Finally, if you are a high profile donor, chances are good that other non-profit executives will also discover you. That may be what you want (cf. donor self-aggrandizement), but it will also diminish your capacity to control your own giving plans.

You may wish to consider total or partial anonymity when first developing your initial giving plans. This will diminish your ability to gather information but it will increase your capacity to control your own giving plan. In addition, it will decrease your tendency to consciously or unconsciously control the object of your philanthropy.

Anonymity will require assistance from friends, consultants or other donors but you will probably find the benefits outweigh any possible disadvantages.

Don't spend too much time on the initial research. Keep your initial investigation time between five and 15 hours. Any more than that and you'll burn out or be engulfed by "donor hunger." Rely on your own instincts and the information of friends at first. Sophistication and polish will come in time.

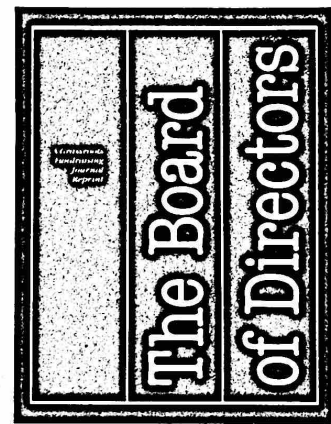
Next issue: Putting It Together and Trying It Out.

Steve Paprocki has his own business, Impact Giving, Inc. He helps people design personal giving plans. He is also active in setting up workplace solicitation programs around the country, and is one of the leading experts in workplace solicitation as a fundraising strategy. Steve Paprocki is located in Alameda, California.



*Two unique collections of
Grassroots Fundraising Journal articles
reprinted from back issues.*

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



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

Order Form	Quantity	Total
The Board of Directors		
Major Gifts Campaigns		

Total Amount Enclosed _____

Send to:
Name _____
Address _____
City _____
State _____ Zip _____

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

Jobs With Peace Holiday Cards: A Plan

by Barbara Markoff & Leigh Kunde

We are pleased that Jobs With Peace—Milwaukee was willing to share the secrets of their incredible success with selling holiday cards. For groups wanting to develop products for sale, we believe this article will be helpful. For groups wanting to develop items for sale during the December holiday season, now is the time to begin planning.

Introduction

Is your organization looking for an event that does the following: 1. raises \$3,000 plus; 2. gives your group high visibility; 3. heightens your issues; 4. is fun; 5. makes a political statement; 6. is marketable; 7. is an affordable product; 8. reaches new constituencies? If you answered "yes" to two or more of the above, read on. . .

In 1985, Jobs With Peace in Milwaukee celebrated its fourth year of selling holiday cards as a grassroots fundraiser. Over the years the quality of the cards produced has improved while the number of dollars raised has also increased. Jobs With Peace holiday card sales have gone from one single color design with a card run of 1600 to six original peace designs by local artists using a one-two multi color

process for an 18,000 card run. Jobs With Peace went from 160 card packs at \$4, or \$640, in 1982 to 1500 card packs at \$4 and 750 card packs at \$5, or \$9750 minus expenses in 1985. Two of the six cards selected were general enough peace designs to sell beyond the holiday rush. The Jobs With Peace holiday card sales has presented the organization a small business idea with the potential for increased income generation.

Holiday card sales is just one of a variety of fundraising efforts used by Jobs With Peace to raise its operating budget. Besides raising necessary dollars, the card sales fundraiser reinforces Jobs With Peace's philosophy—"fundraising is good organizing." The holiday card sales program not only brings in money, but because the

cards have a wide circulation, they heighten interest in what the organization is about, and stimulate people's desire to get involved.

In addition, cards have the potential to raise our organization's visibility with the various constituencies it seeks to reach with the message of peace as a universal and ongoing theme. Finally, the holiday card sale also provides Jobs With Peace an opportunity to work with the arts community.

Structure

This project consisted of three phases: 1. design—solicitation and selection; 2. production; and 3. marketing, sales and distribution. Our start-up volunteer force consisted of a chair and co-chair but later expanded as we neared the production phase.

Before we began the search for artists to participate we had to make a number of decisions, including: how many card designs to produce; what kind of images we wanted; whether the messages should be holiday or general; the card sizes; number of colors per card design; and our timetable. These decisions were based on our fundraising goal, our purpose for doing the project and the amount of up-front expense we were prepared to incur. We also learned that a project like this

Barbara Markoff is the Director of Training at Gimbels-Midwest, a large department store. She served on the Board of Directors of Jobs With Peace in 1985. Leigh Kunde is the Program Director for the Milwaukee Boys' and Girls' Club. She has been active in Jobs With Peace since it began as a coalition-based referendum campaign in 1982.

requires making a lot of decisions at every phase.

We developed a fact sheet for the artists with a statement of our purpose, parameters for the designs, a timetable and the benefits to them for participating in the project. Prepared with this information we began soliciting artists.

Card Design: Solicitation and Selection

Now the fun part started. Our strategy was to go both to artists who had participated with Jobs With Peace previously and to approach artists whom we knew to be sympathetic to the peace issue. The key here was knowing enough artists and gallery owners to approach for recommendations.

Next we called each potential contributing artist, stated our purpose and felt out his/her interest. If the interest was there, we set up a meeting to see samples of their art work and discuss the project in more depth. If we liked the artist's style and felt there was potential to get something consistent with our expectation we asked the artist to submit several designs by a certain date.

The artists we met were extremely excited about this opportunity to contribute to the peace effort. Since most were not "known" artists, they also appreciated the name exposure they would receive.

Often the artist would work up some ideas and then ask to get together for feedback. Some artists created their own messages. Those who left that part up to us seemed to have a harder time conceptualizing the "challenge" and required more consultation time than those with their own messages. It may be wise to have some messages written to give out for inspiration.

We solicited designs from eight artists so that we could choose four finalists. It was a difficult task.

The selection committee consisted of the chair and co-chair, several members of the fundraising committee and several Jobs With Peace volunteers



*Each generation makes its own
accounting to its children.*

Robert F. Kennedy

(including two impartial artists). The goal was to select designs and messages with a broad appeal. In the end, we chose six cards instead of four, including two without a message inside and with general enough images to be sold as peace cards throughout the year. We also decided to produce an insert card that would have a holiday message from Jobs With Peace along with our address and phone number for further orders.

All artists who submitted designs were given free tickets to our annual Jobs With Peace on Earth Dinner along with a coupon for a free box of cards.

The six finalists were given a deadline for camera-ready art. The designs were now ready for press and it was time to involve volunteers.

Card Production

Card production is a very energizing stage in this process, because a finished product can be visualized. The major tasks in this phase include: selecting a printer(s); determining quantity of cards and price; getting camera ready designs and copy to printer; sorting and packaging; and meeting the timetable for production. It is important to set a realistic timetable and to allow two weeks of flexible time on either end of the schedule. By September 25, we had all six camera ready designs to the printer, and we awaited the finished cards. Cards and envelopes were ready for distribution by mid-October.

The month of September was spent

looking for a printer and researching production costs. Finding a union printer and getting some donated or discounted service were important considerations in our final selection of printer(s). We solicited bids from three union printers. You will need to negotiate individual card prices up front with the printer, for the quantities needed, and for your timetable. With the decision to go with six designs compared to four, we chose two printers who had the lowest production cost per card. One printer did two one-color and one two-color designs. The second printer did two one-color and one multicolor design. Ultimately this decision meant more time since there was twice as much negotiation and detail.

In the midst of negotiation, we discovered the color separation process required high technology equipment. A third printer was then involved. If you decide on a two- or multicolor process, ask to see samples of the printer's work. If you do a color separation, the artist will need to verify the colors on the final proof before the card is run. In negotiating price per card, we learned we could purchase envelopes separately from a wholesaler and receive lower prices along with quality and variety.

Some major decisions during this phase that relate directly to setting the fundraising goal and marketing/sales will help you deal more effectively with the printer. First, you must estimate the quantity of each card you want run so that printing costs can be determined. In determining cost per card remember to project and include the expenses of: an insert card; zip lock bags; advertising costs—flyers, posters, ads; and free cards to artists. You will also have to set the price per card pack. Also decide on the quantity discounts by card and by pack. A projected discount sales amount and a regular sales amount need to be determined. In making decisions on the above refer to previous year end totals if you have them (e.g. number of packs sold; amount of money raised).

Other, more fun decisions before the presses can be run are: the type of card paper and stock, including the weight of papers; the paper grain (it should not have an adverse effect on the design or style); the color of ink, including your artist's recommendations; the copy for the inside message, artist recognition, and agency affiliation. Consult with the artist and/or sponsor a contest to get messages from your membership.

From our experience, we recommend you give artists the message to work with in creating their art work. An insert card with a special Jobs With Peace holiday poem was written and information about the group was developed. Consider whether card copy should be typeset and/or done in calligraphy. Typeset style and size has to be decided upon.

Negotiate with your printer to ensure all cards are folded by machine and ready for stuffing. Be sure you personally sign off on all cards as the final proofreader. Check all typesetting and camera ready work—the inside, backside, layout of front design, layout of inside message. Go to press!

While cards are being printed, get insert card and zip lock bags from local wholesalers. Arrange to have all cards, envelopes, zip lock bags, and any other items delivered to the packaging site. Set a date for sorting and packing and recruit 15 or 20 volunteers who can commit to an evening of work. Packaging cards can be fun when done in a group!

Marketing/Distribution

The key decision in this phase was whether to undertake a major local marketing campaign or simply sell cards via our board members, volunteers and at major events. We chose the former. A small committee put together a marketing plan for contacting food co-ops, churches, book stores, local agencies, gift shops, and other peace organizations.

Staff and volunteers shared responsibility for taking samples to everyone on the marketing plan. In most cases,

due to the lateness in the season (October), our cards were accepted on consignment rather than purchased.

Ideally, for this kind of major marketing effort, final card samples should have been available for stores by August.

We had to make pricing decisions about discount rates for co-ops and other non-profits, retail stores, and individuals purchasing large quantities of individual cards.

Another part of our strategy was to distribute press releases to local papers, community newspapers and organizational newsletters. We made a group picture of the six artists available when requested. We did articles in our own newspaper and were lucky enough to be part of a feature article in the major city newspaper on "Holiday Cards."

We made poster displays of the six cards for individual sellers to take to agencies, churches, and other outlets. Record-keeping sheets were developed to help the staff and volunteer sellers keep track of inventory. Order blanks were also available when supplies of cards were not on hand.

This part of the project was keenly staff and volunteer intensive. Volunteers were out selling and staff were busy distributing, tracking sales, collecting money and keeping card retailers stocked with cards.

Conclusion

The Jobs With Peace holiday card sale was a great fundraiser for the organization and a lot of fun for chairpersons and volunteers. It's a fundraiser that can help your organization achieve multiple purposes. If your organization decides to do a holiday card project, we will be glad to share other support materials to make your task easier.

If you don't do your own cards, consider ordering your 1986 holiday cards from Jobs With Peace.

We're working to build a healthy economy in a peaceful world. Jobs With Peace, 4620 W. North Ave., Milwaukee, WI 53208, (414) 444-6010.

Back Issues

VOLUME ONE

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.

VOLUME TWO

Number 1 (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.

Number 4 (August 1983): Grammar for Grantseekers (Putting together a readable proposal); Federated Fundraising (a case study of a federated fund); Asking Current Donors for Extra Gifts.

Number 5 (October 1983): Prospect Identification; The Cost of People (calculating staff costs in fundraising events); Tying Charity's Hands; Tax Strategies for Charitable Giving.

Number 6 (December 1983): Introduction to Phonathons; 29 Ways for Board Members to Raise \$500; Planning for Fundraisers (Planning strategies for fundraising staff).

VOLUME THREE

Number 1 (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).

Number 2 (April 1984): Personalizing Fundraising Appeals; Computers for Non-Profits (Part One); Setting Up a Canvass (Part One).

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

Number 6 (December 1984): Developing a Membership Base; How to Break Through the Bureaucracy (getting access to government money); But Will They Open the Envelope? (designing carrier envelopes for direct mail appeals).

VOLUME FOUR

Number 2 (April 1985): The Lord Loveth a Cheerful Giver (Designing and Maintaining a Pledge Program); The Membership Brochure (Content, Writing and Graphics for effective brochures).

Number 3 (June 1985): Membership Record Keeping; If We Only Had an Endowment (What to consider in starting an endowment fund); A Community United (case study of a farming community's fundraising efforts to help a family in need).

Number 4 (August 1985): Through Rain, Sleet and Snow (the personal experiences of a canvasser); Major Donor Prospecting; Hiring a Development Director; Rapidly Growing Women's Funds; Long Beach "Friendraiser" (case study of a special event designed for publicity).

Number 5 (October 1985): Planning and Running a Phonathon; When Money Isn't the Problem; Philanthropy 1984 Summary.

Number 6 (December 1985): How to Use the Media; Grassroots Fundraising: Back to Basics.

VOLUME FIVE

Number 1 (February 1986): State of the Journal; Raising Money from Churches; Creating a Successful Renewal Program.

Number 2 (April 1986): Seven Deadly Sins, Part One (Organizational Development); Marketing for Grassroots Organizations, Part One; So You're On The Air: Writing PSA's.

Number 3 (June 1986): Seven Deadly Sins, Part Two; Logistics of a Major Gifts Campaign.

Order Form

Qty.	Item		Total
	Vol 1 No. 2	2.50	
	Vol 1 No. 4	2.50	
	Vol 1 No. 5	2.50	
	Vol 2 No. 1	2.50	
	Vol 2 No. 4	2.50	
	Vol 2 No. 5	2.50	
	Vol 2 No. 6	2.50	
	Vol 3 No. 1	3.50	
	Vol 3 No. 2	3.50	
	Vol 3 No. 3	3.50	
	Vol 3 No. 6	3.50	
	Vol 4 No. 2	3.50	
	Vol 4 No. 3	3.50	
	Vol 4 No. 4	3.50	
	Vol 4 No. 5	3.50	
	Vol 4 No. 6	3.50	
	Vol 5 No. 1	3.50	
	Vol 5 No. 2	3.50	
	Vol 5 No. 3	3.50	

Total Enclosed _____

Send to: _____
 Name _____
 Address _____
 City _____
 State _____ Zip _____

Subscriptions

8/86

- Renewal:** enclose mailing label from back cover.
 - One Year (\$20) Two Years (\$40) Three Years (\$60)
- Change of address:** enclose mailing label with old address and write your new address below.
- New subscriber:** fill in your name and address below.

I understand that if I am dissatisfied with the *Journal* my money will be refunded for all the issues I have not received.

Name (Please Print) _____ Organization _____
 Address _____ City _____ State _____ Zip _____

Send me a subscription for One Year (\$20) Two Years (\$40) Three Years (\$60).

(Please allow six weeks for processing of new subscriptions.)

Make checks payable: *Grassroots Fundraising Journal*. Send to: 517 Union Ave., Suite 206; Knoxville, TN 37902

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

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

Moved? Please send us an address-change notice.