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In This Issue:

**How To Conduct
Your First
Capital Campaign**

**Assigning
Fundraising Tasks**

**Gearing Up for
Fall Fundraising**

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How to Conduct Your First Capital Campaign and Live to Tell About It

by William C. Mengerink

Bob and John, fundraisers for two different social service agencies, went on a camping trip together. At dawn, a huge bear began to prowl their camp. Bob started to put on his tennis shoes. John said, "Why are you putting on your tennis shoes? You can't out-run a bear!" To this Bob calmly replied, "I don't have to outrun the bear . . . I just have to outrun you."

Over the past several years at Parmadale, my boss, our board and I have worn through several pairs of sneakers trying to outrun our competition.

Without previous experience, an established consti-

tuency, or the support of a paid consultant, we raised well over a million dollars in three years for Parmadale, a leading residential child care agency in northeast Ohio. Through hard work, an increasingly energized volunteer board and the grace of God, we are dedicating a newly constructed home for children with multiple problems this fall. The suggestions made in this article are based on the encouragement that came from our little successes along the way and the failures that were our greatest teacher.

The Mouth of the Grizzly: *The Problems We Faced*

In 1985, words and phrases like "solicitation" or "major donor prospect" were simply not in our vocabulary. We didn't just start from scratch, we didn't even arrive at scratch until about six months into the campaign. The bear outside our camp was formidable. See if any of these problems sound familiar:

1. Our most obvious drawback was that we had not only never conducted a capital campaign, we had never done individual fundraising of any kind. Besides foundations and government entities, no one among us had ever asked anyone to give us money.

2. Although we had served nearly 100,000 people

over the last 65 years as a residential child-care treatment center, our "graduates" didn't choose to attend Parmadale as an alumnus of Harvard would have chosen to attend Harvard. In fact, we only had records of 38 individuals who made a gift the year previous to starting our campaign. We had an extremely small base of individual constituents.

3. Like many smaller non-profits throughout the country, we receive funds from our local United Way Services. These monies are vital for the continued provision of our quality services, but, in exchange, we have been historically restricted from developing funding partnerships with major local corporations.

4. We had a "working" board that was composed of educators, public officials, human service professionals and religious persons. We had no one on our board of great wealth or great community influence. Further, no board member ever had the expectation that he or she should make a cash gift to Parmadale.

We assumed that if we paid for an outside consultant to conduct a formal feasibility study that these factors would emerge as reasons why we should not proceed. What we believed couldn't be fully factored in, though, was our deep conviction that if this building was not built soon, many children would suffer.

A Map Out of the Woods: *The Guidelines:*

I suggest that you consider these steps if you are thinking about trying to outrun the bear and raise capital money:

1. *Conduct your own feasibility study.* Here's how we conducted ours:

My boss said we need to raise a million dollars to construct a building. I said I don't think we're ready. He said, you're probably right, let's do it anyway.

This is not to imply that there isn't an advantage in doing a sophisticated feasibility study. There is. For one thing, you learn how much support you have in advance of "going public" and, by framing your interviews with key prospects as "non-solicitous," you can get information without the confrontational stress that comes from actually asking for money face-to-face.

However, at Parmadale, we concluded that small social services agencies will never "be ready," not when readiness is defined in comparison to the colleges and cultural organizations that have been raising money for decades.

How do you reconcile this need for information, on one hand, with the compelling need to proceed with your project on the other? I suggest that one way to do this is to conduct your own informal feasibility study.

Develop a list of key people in your community, people like bankers, realtors, attorneys, CEOs, etc. Send them a letter asking if they would give a 20-minute interview to a volunteer on your board. Promise you won't ask them for money. Write some questions like, "Do you think the community would support our campaign?" or, "What kind of public image do we have?" Conduct the same interview with all of your volunteers. You will acquire good information and make some new friends.

2. *Learn everything you can about the capital campaign process.* Assuming that you can't afford \$20,000 a

month for a prestigious fundraising company to come in and run your campaign for you, you will need to learn as much about the capital campaign process as you can. As I had done many years earlier as a rookie English teacher, I stayed "a chapter ahead of the kids" this way.

Talk to anyone you can find who has been involved with a campaign. A resource who has failed in a campaign may be as valuable as someone who has succeeded. Secretaries can give you insights that you can't buy out of Chicago. Join your local fundraising organization if one exists. Subscribe to magazines. Go to your library.

Shop for a full-time development director who is not a consultant, but who, for a small fee, would gladly sit down with you for a couple of days and share his or her insights. An investment of a few hundred dollars will pay big dividends.

Attend workshops. Drag along, even if they're kicking and screaming, any key players you think would also benefit from the workshop. For example, bring your board development chairperson to a seminar on the role of the volunteer. This will help neutralize the potential "Nazarene in the hometown" effect that can happen as you acquire some knowledge in the area.

3. *Identify your volunteer leadership.* If you don't already have your board positioned to fundraise (and most of us don't), make this a top priority. For your top leadership person, or campaign chairperson, you should look for these qualities:

- a. A willingness and capacity to make a large gift very early in the campaign.
- b. A willingness and capacity to be visible and accessible to other board members.
- c. Because of his/her wealth and status, the ability to manage the process of setting up interviews between other key corporate leaders and members of your

staff/volunteer team of solicitors.

4. *Share the ownership of the capital campaign with your board.* For your capital campaign to be successful, the ownership of the campaign absolutely must be shared between the director of the agency, the key board members, and whoever you have on staff to help you raise money. If you don't insist on this level of support from the beginning, your team will walk into the circuitous trap of finger-pointing if the campaign begins to struggle.

5. *Insist on one-hundred-percent gift support from your board members.* This isn't a guideline. It's a rule. Some foundations in Ohio won't even consider making a grant to an agency that doesn't have this level of support.

6. *Write your proposal.* Write it right. Your proposal is arguably the most important single tool for your whole campaign. Follow this classic formula and don't cut corners:

- a. Summary statement (write it last and put it first)
- b. Credibility statement
- c. Statement of problem or need
- d. Objectives (in concrete and measurable terms)
- e. Methods (describe your entire campaign strategy)
- f. Evaluation
- g. Budget
- h. Appendix

Keep it brief. Put enhancements of main points in the appendix for those readers who may want more information.

The actual process of writing the proposal will force you to think strategically and carefully about the project. Next, the proposal will become your marketing tool and, finally, after you have reached your goal, the proposal will become your blueprint for implementation or, in some instances, even your contract.

7. *Plan on spending some money.* Depending upon such variables as the size of your campaign goal, number of active major donors in your constituency, visibility in the community and local economic factors, you can expect to spend between 8 and 18 cents on a dollar.

8. *Identify your prospects.* Develop a firm list of all of the organizations and individuals you know who might contribute to your campaign. Involve your board volunteers in the process. This is how we divided ours:

- a. Board members
- b. Staff
- c. Foundations (private and community)
- d. Foundations (corporate)
- e. Businesses (that don't have formal philanthropic divisions)
- f. Individuals (who might give a major gift and give early in the campaign)
- g. Individuals (who, collectively, would make many small gifts)

For internal reasons, we chose not to solicit from

government sources although, of course, this is another legitimate source to consider. As a general rule, many social service agencies overestimate the amount of support they expect from corporations.

9. *Go after your major gifts first.* We realized that we could either ask one person for a million dollars or ask one million people for a buck. We hoped that we would end up somewhere in between. The Pareto Principle, or 80/20 rule, suggests that 20 percent of your donors will give you 80 percent of your money.

Major donors like to be asked early, in the beginning of a campaign.

10. *Plan the "public" portion of your fundraising for the end of your campaign.* Don't expect to raise much money this way. Your campaign should be nearly completed before you "go public."

11. *Develop your materials.* You will need at least the following materials for public distribution:

- a. Proposal
- b. Short-form of your proposal
- c. Agency flyer
- d. Capital campaign flyer
- e. Pledge cards
- f. Mailing and return envelopes
- g. Posters (optional)
- h. Brief video presentation (optional)

12. *Create a headquarters for the campaign.* Depending upon the size and resources of the agency, designate some restricted space to run your campaign. Whether you have a fundraising staff or not, someone will have to keep accurate records of who:

- a. has been solicited
- b. made the solicitations
- c. made a gift and of how much
- d. has been thanked
- e. does and doesn't want public recognition
- f. has made a pledge and when he/she wants to be reminded

You will need to generate reports for volunteer team members (to keep them accountable and motivated), foundation sources, and your auditors. If you can't hire a temporary bookkeeper during the public portion of your campaign, help your present clerical staff to divest of some responsibilities to enable him or her to handle the considerable minutiae in store for you.

13. *Ask people for money.* Most campaigns fail because staff and board, new to the game, don't ask enough people for money. This is particularly true of smaller social service agencies that have traditionally relied upon government support. Don't make the mistake of doing everything else well, except asking.

14. *Divide the job of asking among members of your team.* At Parmadale, we succeeded with this formula:

Executive director devoted much of his time acquir-

ing an advance gift, a gift that turned out to be the single largest gift of the campaign.

Board members broke new ground by raising money both from individuals and from corporations.

Development director did all of the foundation submissions and was responsible for campaign management.

15. Use the "group of twelve" method of board solicitation. This is a simple (but not easy) way to help volunteers raise money. Here are the steps:

- a. Identify the wealthiest and most influential people you know who you think would join a committee to help your campaign succeed.
- b. Have the "right person" (or persons) on your board ask these twelve to help. The right person is someone who the prospect finds is difficult to say no to.
- c. Tell members that you will have eight 1-hour meetings over the next year and that attendance is extremely important.
- d. Tell each member that they have two responsibilities: make a gift early and raise a specific amount of money from others.
- e. Tell members that they will report their progress at every meeting.

The secret to the success of this method is in reaching as high as you can for the first member of this elite group. He or she will attract the rest of the group.

16. Create a timeline. Next, give yourself extra time. Done? Now go back and give yourself extra time. The task of raising capital money will be stressful enough

without the additional burden of an unrealistic, self-imposed timeline.

17. Use volunteers to help you with foundation research. Under my supervision, our eight volunteers researched the Foundation Center Library and identified over 350 foundations in Ohio that appeared to be prospects for a proposal submission. Next, with a script I wrote, they called all of them and reduced the list to 102. I then submitted the proposals at a rate of 10 a week over the next couple of months. We received funding from 32 foundations. Of these foundations, 27 were new grant-makers to us, a welcome sign for future foundation funding at Parmadale.

18. Make sure that you send out a thank-you within 48 hours of receiving a gift. I once told my boss that my job could be reduced to saying two things: "thank you" and "I'm sorry." This simplification points to the importance of doing cultivation work for your future. You will attract many new donors to your campaign. Think past the campaign conclusion and remember that a majority of these donors will become regular, sustaining contributors to your agency in years to come if they are properly cultivated. A prompt and personal thank you is a first step.

Consider writing your thank you to top donors in long-hand. When was the last time you failed to read a letter to you that was written by hand? Also, a personal phone call should be made as soon as you receive what you define as a large gift.

Outrunning the Bear and Living to Tell About It: *Dealing with Stress of Conducting a Capital Campaign*

It's important to know that if you're not careful you can, at the worst, burn out doing a capital campaign and, at the least, hurt some relationships with important people.

1. Make sure that all the players on your team have clear expectations. Board volunteers and staff should know precisely what their roles and tasks are. Be candid in the beginning.

2. To the extent possible, give everyone specific, concrete and measurable objectives. Volunteers, especially, should know the answer to these questions:

- a. What do you want me to do?
- b. When do you want me to do it by?
- c. How will I know when I'm done if I succeeded?

3. Provide training to staff and volunteers. Because capital campaigns are periodical activities, very few organizations, even colleges, have people on staff who are experts. Money will be well spent that goes to providing good training experiences.

4. Create a realistic timetable. No matter what your early estimate is regarding timeline, the fact is that it will take you longer than you expected. Give yourself enough time.

5. Accept the fact that most successful campaigns will demand up to 40% of the director's time and 95% of your fundraising staff's time. All staff must communicate regularly about campaign developments and volunteers will need more of your time than ever before.

After the Race is Won: Hidden Benefits to Your Agency

After you've successfully completed your campaign and shaken your head clear from the few whacks you'll be sure to take along the way, you will discover these extra benefits:

1. *You will have an increased constituency.* You will have new donors who will become future annual donors. New foundation benefactors and corporate sponsors will also emerge.

2. *You will have raised your volunteers' fundraising consciousness to new heights.* New volunteers will emerge as leaders while you weed out those members who aren't prepared to invest themselves, financially, in your future.

3. *You will have a much higher profile in your community.* With work and any kind of luck, the media attention you will have received will help future fundraising efforts.

In summary, we raised over 1.3 million dollars from

over 700 persons and organizations over the three-year period. Our days were filled with excitement and disappointment, conviction and confusion, and, certainly, adrenalin. When it was done, we realized that we not only raised our money, we also put together a team and created a climate that will continue to help Parmadale prosper well into the 21st century.

As you begin your own campaign, remember that you can't do everything at once, but you can do something at once. Why not start by lacing up your running shoes? Happy camping. ■

Bill Mengerink is director of development at Parmadale, a residential child care center a few miles south of Cleveland, Ohio. Parmadale's Board, Executive Director and he shared the responsibility of raising 1.3 million dollars to build an intensive treatment center for multi-problemmed adolescents. Bill is past president of the Ohio Council of Fundraising Executives.

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Assigning Fundraising Tasks: *When Compulsiveness is a Virtue*

by Kim Klein

There are dozens of ways to encourage people to volunteer for fundraising tasks and then to ensure they do what they volunteered for. One particularly innovative method is described below. The inventor of the original version of the system is the Director of a small nonprofit community center in rural New England. Her Board of 15 community activists, none of whom are wealthy, have all agreed that their Board function is fundraising.

This Director faced a succession of problems typical of many grassroots groups. It started with a Board that didn't want to do fundraising. To solve that problem, she and the Board's fundraising committee arranged for Board members to have a training so they could understand their role in fundraising. With recruitment of some new Board members and agreement on the part of all Board members about their fundraising responsibilities, it seemed the organization would now raise money smoothly and efficiently. But, human nature being what it is, one problem is solved only to reveal another immediately under it. The next organizational problem was that Board members didn't know what fundraising tasks to undertake, didn't necessarily finish the ones they volunteered for, and the Director didn't have the time to coordinate their activities to the extent required.

To solve that problem, she and the fundraising committee decided to create a master fundraising plan at the beginning of every year, prepared in the form of a chart. The purpose of the chart was to get everyone to agree to do their share of fundraising and to have a systematic way of figuring out what everyone's share was. The chart would also give the Director (who is one of only two staff) a clear sense of who was working on what, and it gave Board members a great deal of planning time and flexibility in choosing tasks.

The chart took into account all the variables that

Board members had presented. For example, some Board members were free to do things during the day, while others had to confine their work to evening time. Some liked working on weekends, others refused. Some liked working alone, others preferred groups. Also, Board members had frequently voiced a concern that while all fundraising is important, it is harder to ask someone for \$1,000 than to organize a raffle, even if the former takes less time than the latter.

The Fundraising Committee made a list of the fundraising strategies for the year and the cluster of tasks for each one. They then charted the variables for each task, as follows:

- Number of people required to perform task
- Time involved, including number of hours and type of time (daytime, anytime, summertime, etc.)
- Skills or resources required (for example, need a car, typing, public speaking) and knowledge required (such as familiarity with history of group, knowledge of issues)
- Other: things that didn't fit in other categories as well

Legend for Example 1 (*right*):

¹Time—d: day; w: week; m: month; V: varies, or less than 1 day.

²Type—A: anytime; D: daytime; E: evenings.

³Other—

S: Staff heavily involved, 50 volunteers don't have to know what to do in order to take on this task

I: Written info & examples available

P: Previous year's written material can be used again with minor modifications

A similar list was prepared for each strategy. The lists are specific, but not so detailed as to be endless. They imply a certain level of familiarity with the fundraising process, and so require that all Board members are trained well in the basic elements of each strategy.

Example 1.

Master Fundraising Plan

Put your
name
beside tasks
you want

Strategy & Tasks

Number
of people
needed

Time:¹
days or
weeks

Time:²
type

Knowledge, skills
or resources required

Other³

Degree
of diffi-
culty
(1-10)

Direct Mail

Planning Tasks

Plan direct mail campaign	2	1d	A	Know DM strategy	SI	4
Acquire lists	2	1w	D	Know DM strategy	S	2
Design package	1	1w	A	Some design	I	6
Write letter	1	1d	A	Writing	IP	4
Oversee production of enclosures	1	1w	D	Proofreading		2
Oversee printing, including picking up stuff from printers	1-2	1w	D	Car		2
Mailing tasks						
Fold, stuff, sort for bulk	10	3d	E	Can be learned	IP	4
Take to Post Office	2	1d	D	Go w/someone	S	4
Monitoring tasks						
Keep track of responses	1	V	A		SP	4
Write thank you notes	3	V	A	Clear handwriting		8
Enter new donors onto mailing list	2	V	D	Computer or typing	S	8
Write evaluation of each list and package	1	1d	D	Computer or typing	SIP	6

Major Donor Campaign (Fall and/or Spring)

Plan & oversee major donor campaign	2	3m	A	Experience	S	3
Design gift range chart	1	1d	A	Experience	SP	2
Collect names of prospects	2	1w	A		S	4
Verify research on prospects	2	1w	A	Ask questions	IP	4
Recruit volunteers for soliciting	2	1w	A(E)			6
Prepare package for volunteers sample letter questions and answers pledge cards reporting forms	2	1w	A	Experience	PS	10
Train volunteers	V	1d	E	Training	Consultant	V
Solicit gifts over \$100 New prospects	10	V	A	Training		8 ea.
Renewals	10	V	A	Training		4 ea.
Keep track of responses	3	V	A	Record-keeping	S	6
Remind and encourage volunteers	2	V	A	None		6
Send bi-weekly memos of progress	2	1d	A	Writing	P	10
Evaluate campaign	3	1d	A	None (group effort)	SIP	4

as three additional important pieces of data, which were coded as follows:

S: Staff will be heavily involved, so Board members don't have to know what to do in order to help with this task

I: Written information and samples available

P: Previous year's materials can be used again with modifications.

The final aspect of the chart is what gives it uniqueness. The Fundraising Committee weighted each task according to its difficulty. They took into account all the above variables plus the most important aspect: the degree of psychological difficulty involved. They assigned a weight between 1 and 10, with 1 being the easiest and 10 the hardest.

Their chart was written on a long bookkeeping piece of paper and looked like Example 1.

The purpose of the chart was to get everyone to agree to do their share of fundraising and to have a way of figuring out what everyone's share was.

Next, they added up the total number of points in the weighting system and divided those by the number of Board members. Then, as part of a day-long retreat, the fundraising plan was presented, with each Board member having his/her own copy of the chart.

The Chair of the Fundraising Committee explained how the chart worked. Of course, there was much jesting about the degree of compulsiveness required to create such a chart, how the committee had probably given themselves a lot of points just for creating this thing, and so on. Since the committee was not defensive and, in fact, joined in the fun, the rest of the Board agreed to try this method of getting the fundraising tasks accomplished.

Each Board member worked quietly for ten minutes and marked on their own chart the tasks and strategies he/she wanted to be involved in. Each one added up his/her points. When they were done, a member of the fundraising committee reconvened the group, and then read each task out loud. On a master sheet (in this case a long sheet of paper off a roll from a butcher shop), another committee member recorded the results.

They needed to ensure that each task had enough people to do it; in some cases, some tasks had too many people. Sometimes Board members disagreed with the weighting of tasks, thinking that some tasks were harder than their weight indicated, and some were easier. Each Board member had to have the same number of points at the end. For some, this meant only a few hard tasks, and

for others this meant a dozen or more easier tasks.

Board members bargained, pleaded, complained and traded tasks until a Master Task List was created. The process of discussing the plan task by task created a level of knowledge about each strategy that no amount of training had been able to approximate. Further, Board members owned the plan. This entire process took one full day to create, three hours at the retreat, and one full day to type up the Master Task List with everyone's name on it.

After the retreat, a final copy of the Master List was sent to each Board member, with the tasks that he/she had signed up for highlighted with a yellow or blue marker. The Grand Master List hangs in the Director's office, and she is able to see at a glance who she needs to talk to and meet with for every task in which the Board is involved.

This community center has now used this method for three years. Board members have routinely complained that they don't wish to be this compulsive and that the scoring is arbitrary and rigid. They have also finished more tasks than ever before, and every year they vote to create the task list again. The very things they complain about create opportunities for humor and for learning. Listing out tasks involved in each strategy pre-empts Board members thinking that some people are getting off lightly, or wondering why "staff can't do that."

Since this method of task assignment was first brought to my attention, other groups have developed modified versions of it. For example, for one Board, the staff person created an individual list of tasks for each Board member every three or four months, with choices about accepting the tasks and the weight assigned for doing different tasks. This chart looked like Example 2.

Each Board member checks off whether they accept the task or not. If they check "Forget it," then they have to list something else (under "I'd rather") and assign a value to it.

Using a form like this for every fundraising strategy or campaign allows you to give extra credit to people who worked hard previously, or to give out extra assignments to those who did not do their full set of tasks. This method requires much less overall planning than the first example.

Drawbacks

The advantages of this kind of planning can readily be seen. A clear list, clear assignments, a sense of teamwork on the part of the Board, etc. There are a few drawbacks, and several problems this method does not solve. One drawback is that for staff or committee members who are not list makers or detail oriented, the plan falls apart because it requires those skills to create and to monitor.

Example 2.

Confidential

Winter Fundraising Campaign

Proposed plan for: Betty Stein
 (Total Points Needed: 15)

Item:	Points	Yes	Forget It
Contact these people for renewal:			
Joe Baltic: \$250, long-time supporter	2		
Ann O'Malley: \$500, your friend	1		
George Magnuson: \$500, he is mad because we picketed the mayor's house. You'll need to explain that to him.	4		
Contact these people for first time gifts:			
Tania Thigpen: \$100	3		
Rosa and Mauro Sanchez (from their business): \$500	3		
Other:			
Take tickets at the dance	2		
	15		
TOTAL			
I'd rather:			
In addition, I'll			
TOTAL POINTS			

Second, this is a hard method to use with people who have limited reading skills or limited knowledge of the primary language of the group. For example, a care center for the elderly has a Board of people for whom English is not their first language. Furthermore, two of their Board speak, but do not read, English. Even though groups like that can take time to explain the chart, it favors the better educated or the more middle class in the group and can create or exacerbate a power imbalance.

The final drawback is that it assumes a level of stability for both Board members and the organization that not all groups have. If Board members travel a great deal, have temporary jobs, or live with little daily routine, this mechanism will not be workable. Similarly, if a group has little idea what its financial situation is going to be from month to month, planning a year ahead could still be fruitful, but could require a level of flexibility that is not inherent in this chart.

Summary

No method of getting people to take responsibility works without a sincere effort on the part of Board and staff to do just that. Some Board members sign up for tasks with little intention of completing them. This chart will not help them.

Some staff people try to dictate to the Board what they should be doing because they do not trust their Board members, or think of them as "lazy" or "interfering," and then wonder why Board members won't work. This method will not work for them, either.

Good faith, an acceptance and commitment to mutual accountability and a sense that Board and staff are part of a team effort for an important cause are fundamental to the success of any plan. With these things in place, this planning mechanism works well with many groups. ■

The Best of the Journal

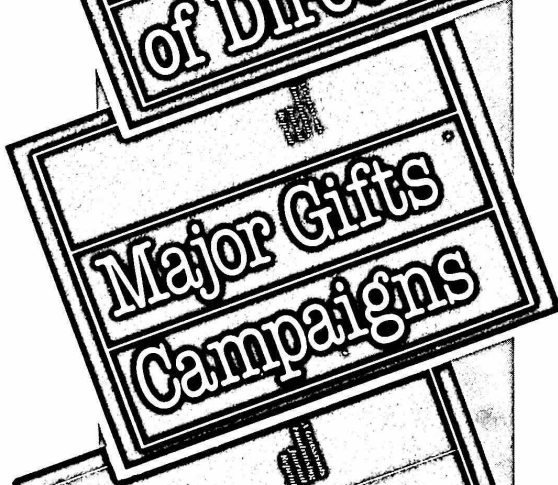
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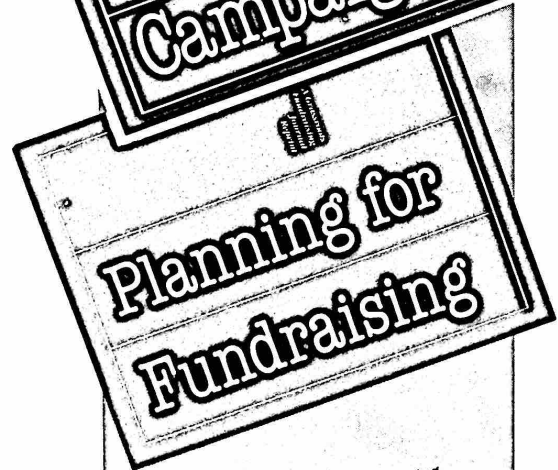
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Gearing Up For Fall Fundraising

by Kim Klein

August again? How did that happen? That means soon it will be September, then October, then November, and then December. If this brilliant observation is clouding your day, it is time to get a grip on August.

August is a fundraiser's chance to become proactive about the fall so you won't find yourself in the first week of January making a mental list of missed opportunities.

Here are some suggestions for using August wisely:

1. Take a vacation. Get rested up, get away. Remember that you are not your work, and that you are valuable because of who you are, not just what you do.

2. Work regular hours. Work eight-hour days, and take weekends off. If you must work on the weekend, take a weekday off.

3. Schedule one day to clean off your desk and clear out your files. Dust your bookcase, vacuum your floor, and wash your windows, if your office has a window. Look at everything in your office and ask yourself, "Do I need it? Do I use it? Do I like looking at it?" If you can't answer "yes" to one of those questions, throw it away. That goes for things you think you should read in order to improve yourself but that really bore you and expensive office supplies that you bought in a fit of getting organized and have never used.

4. Encourage all your staff to do #3, and clean up all common areas. (Staff includes unpaid staff, also

known as volunteers.)

5. On one weekday during the month, in the middle of the afternoon, shut your office and take everybody to a matinee.

These exercises will clear out your head, provide a clean, clear workspace and help you get ready to make fall fundraising plans without physical and mental clutter. Going through all your stuff will also remind you that you have done a lot of work so far in 1989, and allow you to feel better about how your year is going.

Now you can begin renewing your fall fundraising plans. Make sure you have the following in place:

○ A big calendar that shows the months of September through December. Take a pen and cross out the days and weeks that you can't work with volunteers or schedule meetings with donors. Although fall is four months on the calendar, in work time available it is closer to two-and-one-half months. Also cross out one day on either side of the major holidays to account for people being tired, getting back from trips, and so on. Thus, on your calendar, Labor Day weekend will start August 31, Thanksgiving will end the following Tuesday rather than Monday, and Christmas/Hanukkah will begin December 15 and end January 3. Consider elections, Rosh Hashonna and Yom Kippur, the World Series, and so on, and you will see why fall seems to pass so quickly.

○ Looking at your fall fundraising plan, list all your strategies in decreasing order according to the amount of money you expect them to bring in. Make a second list of strategies by your organization's ability to do them annually, also in decreasing order. With a pen, mark as TOP PRIORITY those activities that both bring in the most money and that you can do every year. Thus a foundation proposal due September 15 worth \$10,000 is a high priority of list 1. However, it ranks near the bottom of list 2 if that foundation has already said they only fund groups for three years and you are going for your third year. A direct mail campaign to get new donors is low on list 1 and high on list 2. What is high on both lists? Seeing an inherited wealth donor who has given \$2,500 every year for three years. Calling a volunteer who does a houseparty in November that always raises \$3,000, and that he always claims would raise more if he got started earlier and invited more people.

○ Having ranked your plans like this, schedule all the top priority things first. Then decide which items that appear high on one list but not the other are still going to get done, and in what order. So, writing for a third year of funding is a good idea, even if it is not repeatable. Sending a direct mail letter for new donors is a good idea because you always need new donors. Spending a day at a booth at a street fair when you are not currently

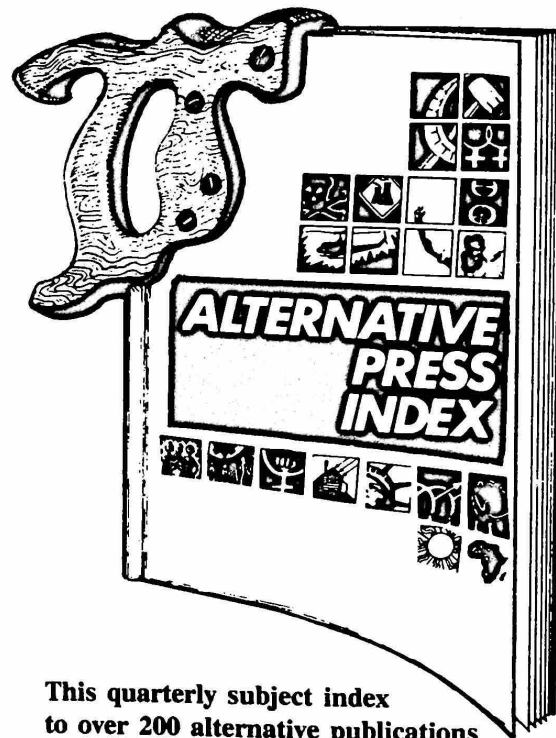
working on any issues nor have any literature that is useful to the community attending this fair is not a good idea regardless of the fact that the booth is free.

○ Use the rest of August to shore up your infrastructure. Write down the information you have about your donors that you currently carry in your head and on tiny scraps of paper. Plan the articles for your newsletter for the next two or three issues and call people *now* to begin writing them. Make sure you have enough stationary, envelopes, and return envelopes for most of the fall. If you don't, order them now, and ask the printer for a discount in return for not needing them very soon. (Because August is a slow month for many printers, it's a good time to get good deals.)

○ Finally, think about aspects of your job that you don't do or don't do well because you don't know how. For example, you don't feel confident in your direct mail skills, or your organization has no planned giving program even though you serve a large senior population, or you are doing things by hand or on a typewriter even though you have heard your computer can do these functions more easily. Research where you can learn about whatever you don't know and sign up for a class, or buy the books, or ask a friend to take a couple of hours to tell you, or hire a consultant. Fundraising is increasingly competitive and automated. Though unfortunate, these are facts of our lives. We need to understand as much as we can about all fundraising strategies and technologies so we can make informed choices about when to use them.

Ideally, if you follow this plan, you will enter September rested, confident in what is to be done and ready to do it. Although that feeling does not last, it will make your work easier and more productive for a while, which is all that can be said for any plan. ■

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