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Grassroots

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Annual Report**

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First (or Next)
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Creating an Annual Report

by Kim Klein

Moan. Groan. These are the two words most associated with thinking about putting together the annual report. What to say? How to make it snappy, but not slick? How to express an urgent need for more money while making last year sound like the best year yet? Pictures — where did we put them? Will the audit be ready in time?

The annual report shows that your organization is accountable for its programs and finances.

Many groups have never done an annual report and don't even know where to begin. This article will tell you where to begin — and where to end.

A Definition and a Reason

In a recent workshop, I mentioned the annual report and a feisty young community organizer from Los Angeles said, "Why should we do that — it seems like a waste of time! And what is it anyway?"

An annual report is a summary of organizational highlights, as well as a full disclosure of income and expenses for the most recent fiscal year. The purpose is two-fold: to show that you have nothing to hide financially and you are happy for the public to know what your public charity is doing; and to show that money was well spent on programs and that the mission of the organization is one year closer to being accomplished.

The annual report is designed to make those who gave money proud that they did, and thus make them want to give more. It can also be sent to major gift prospects — individuals and institutions — to introduce your program and to solicit money.

The Better Business Bureau's Philanthropic Advisory Service answers calls from the public about charities. In evaluating whether a charity is worthy of a gift, one of the

criteria is whether the group publishes an annual report. The need to show that your organization is accountable for its programs and finances is a prime factor in deciding to publish an annual report.

Components and Format of an Annual Report

There is no set order for the elements of an annual report and the formats vary widely. However, a traditional format is as follows:

- A statement of the organization's mission or purpose
- A letter from the chair or president of the board conveying enthusiasm for the work of the group during the past year
- A statement from the executive director or the staff as a whole conveying pride in their work of the past year
- A description, program by program, or area by area, of the organization's work and progress, noting highlights and, to the extent they are resolved, any problems encountered during the year
- A statement about plans for the coming year
- A narrative summary of fundraising efforts and results
- A statement of expenses and income, by category (If you have an audit, use those figures here)
- A list of staff, board and volunteers
- A list of donors

To make them more readable, annual reports usually contain a few pictures and a couple of graphs. They are designed with a lot of "white space" to make them easy to read and are often staple stitched with a cover. Because of the accessibility of desktop publishing programs and the sophistication of copy machines, this does not have to be as expensive as it sounds for organizations in or near large urban areas with lots of competing copy shops. Many organizations now have desktop publishing programs on their computers. If you don't have one or don't have access to such a program, use what you do have and make it readable by creating wide margins, underlining some sentences and using bold subheads to set off sections.

Although annual reports can be as long as short

books, they do not need to be, and there is little evidence that multi-colored, glossy and extremely expensive annual reports are read by anyone, or that they convey anything about a group except willingness to spend money on their annual report.

Let's look at each component.

■ **Statement of Mission**

One or two paragraphs taken from your case statement begin the annual report and act as an anchor around which the report is built. They remind the reader of the bigger picture and are meant to stir some feeling of agreement: "That's right. That's important. OK, let's see how they did."

■ **Letter from the chair or president of the board**

If your board is run collectively, then this is a letter from the whole group and all their names would appear at the end. The purpose of this letter is to convey excitement: the theme is, "Yes, we worked hard and did it for free, but it was absolutely worth it because this is a fantastic and effective group, and we look forward to working hard again next year." The letter should thank the other board members and volunteers, thank the donors, and express appreciation for the hard-working staff. There is very little real content in this letter, although it can tell a few stories about volunteers and their efforts. If the group has overcome some obstacle (a deficit, a fire in the building, staff turnover), the letter can address that. It should fit on one page — 300 words at most.

■ **Letter from the executive director or, if a collective staff, from the whole staff**

The tone of this document is more formal and serious than the board letter and pulls out the highlights of the year, which will be described in more detail in the body of the report. The letter thanks the board and tells a few details about the work of the board. The letter also thanks the staff and may mention some human interest stories about staff, if they would be interesting to readers who don't necessarily know them. For example, if a staff person completed a course of study or won an award; if someone was on maternity or paternity leave and is now back; and if someone did an exceptional job on a difficult task. Again, this letter should fit on one page, unless there is a compelling story that takes up more room.

■ **Description of the previous year, program by program**

This is the bulk of the report. Any story alluded to earlier is detailed here. In writing this part, keep to information that will be interesting to people who are not in the inner circle of the organization, such as board and staff. For example, members of an organization seek and finally are given a meeting with their state senator. They are warned that if they are not on time, the senator will move on to the next person. They make sure they get to

his office early (a two-hour drive to the state capitol from their community) and then are kept waiting for two hours. When they return to their car after the meeting, it has been towed because of street cleaning. It takes them the rest of the day to get the car back and costs them \$200

How to express an urgent need for more money while making last year sound like the best year yet?

in fines and towing charges. Undoubtedly, this is what they will most remember about their meeting with this senator, but their annual report will say this: "A contingent of members met with Senator Greedgraft and were able to persuade him to sign on to Assembly Bill 141, which will enforce the sewage treatment laws in our rural counties. His support gave the necessary margin and the bill passed the next day." Then the report will discuss how this law is to be enforced and the group's plans for monitoring enforcement.

In writing this section, use subheads to introduce each activity and break up the copy. Use quotes instead of descriptions ("Smith said, 'Without your organization, my son would be in jail'" rather than "Smith said that without our group his son would be in jail.")

Readability is key. It is often worth the money to hire a professional editor or to seek that service for free or low cost from a board member or volunteer.

This section is all content and is as journalistic as possible. Avoid a lot of adverbs and adjectives; this section presents the facts and the stories and the reader decides whether it was a good job or not. You want the reader to be saying to him or herself, "What a good job! Excellent! Wow!"

■ **Plans for the coming year**

This is a one- or two-page section discussing how you will keep on doing your excellent work. If you plan any changes in direction or strategy, that is discussed here.

■ **Narrative summary of fundraising**

This one-page section thanks the donors again and summarizes fundraising strategies and successes. If this has been a hard year, say that and say why if possible. Note what your plans are for ensuring that next year is not as hard.

■ **Financial summary**

A simple, easy-to-read listing of expenses and income, item by item. If there are unusual or unusually high expenses, explain them in a footnote. You want your expense and income summary to show that you ended

with slightly more income than expense; however, if you ended with a deficit, you will have to show that. The reporting of income and expenses in your annual report, audit and 990 (IRS reporting form) must show the same bottom lines, even if the format and the categories are slightly changed.

▪ **Listings**

The last two or three pages contain names of board members, with some identification (i.e. Joe Vasquez, public interest attorney; Charmaine Bennett, teacher, Parsons Elementary School); a list of staff with their staff role; and a list of donors. The donors' names are usually in alphabetical order with no amounts or categories indicated. Every donation helped your work and every donor ought to be thanked equally. One of my major pet peeves is annual reports that list donors as follows: "Thanks to the following foundations and corporations" followed by a list of their names, and then "and thanks to the hundreds of individual donors" with no names. Individual donors are just as important as foundations and corporations, and their giving is a lot more stable and free of strings. They should all be listed by name. Use small type if necessary

and go onto several pages if you have hundreds of donors. Obviously, if you have thousands of donors, you will not be able to list them all, but few grassroots groups are in that position.

Compiling Your Annual Report

Much of the annual report can be written even before the year is ended; scheduling the writing of it over two months makes much more sense than jamming it into a weekend. One or two months before the end of the fiscal year, make a plan for the content of the report. Decide who will write each section and assign writing and deadlines. Much of the information should be already compiled in foundation reports, direct mail appeals and reports from the staff to the board, or in board meeting minutes.

The most important thing to remember in compiling an annual report is "less is more." Be honest, tell the truth, but don't put in every detail — you'll lose people. Your best bet is to have a report that makes people want to sit down and read it as soon as they get it in the mail. If it looks too long or dense, they will put it aside for another time, which may never come. ■

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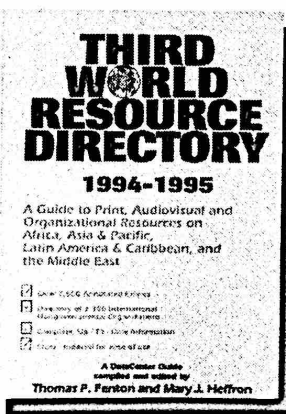
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Third World Resource Directory 1994-1995. Compiled and edited by Thomas P. Fenton and Mary J. Heffron. Maryknoll, N.Y.: Orbis Books, April 1994. 5 indexes. ISBN 0-88344-941-2. ISSN 1074-3145. \$64 each postpaid (add \$2 surface mail outside N.A.) Add \$5 sales tax in California. Orders to Third World Resources, 464 19th Street, Rm. 222, Oakland, CA 94612-2297 USA. Credit card orders: 1-800-735-3741.

How to Raise the First (or

by Dave Fleischer

I had the great pleasure of training with Dave Fleischer a few months ago. In helping gay candidates for political office plan their fundraising campaigns alongside their political campaigns, Dave hands out the following worksheet. It can be adapted to any fundraising campaign and could be used in board meetings or fundraising planning sessions. The worksheet follows a principle of fundraising

that cannot be repeated often enough: Fundraising is a numbers game. If you ask enough people, you will get the money you need. Each strategy, if done properly, has an expected response rate and the amount of gross income that it will yield can be calculated fairly accurately and easily, as this worksheet shows.

—Kim Klein

1. Major Donors

- Make a list of everyone who will give \$200 or more to your campaign.
- For each, select the amount you think they will give.
- Add up the amounts and divide in half.

Total major donor contributions \$ _____

2. House Parties

- Make a list of everyone who will put on a house party that brings together 40 people and raises \$1,000. Multiply the number of names by 50%; this is the number of potential hosts who will actually follow through and do their house parties. Multiply this by \$1,000.
- Make a list of everyone who will give a house party that raises \$2,000 or more. Calculate the amount all these house parties would raise, then cut it in half.
- Add up the amounts in 2a and 2b.

Total house party contributions \$ _____

3. First mail solicitation to your personal list

- Look at your list of everyone who will do more than vote for you. Omit for a moment the names of all your major donors and potential house party hosts. Count the number of people left.
- You will mail some fundraising appeal to all these people. Multiply the number of people times 15%, which is the likely response rate. This is the number of people who will donate small gifts from a mailing.
- Multiply the number of small gifts by mail by \$25, the likely average gift. This is your total from your first mail

appeal to your own in-house list.

Total from first mail solicitation \$ _____

4. Mail solicitation to organization list

- This section only applies if you have authorized use of the mailing list of an organization with which you're closely affiliated and whose members are highly likely to support your candidacy. Look the list over and omit the names of people you've already contacted above. Count the number of people left.
- You will mail some fundraising appeal to all these people. Multiply the number of people times 2%, which is the likely response rate. If the list also has phone numbers, and if you're committed to having volunteers call the names on the list to follow up the mailing, then double your response.
- Multiply the number of donors in 4b by \$25, the likely average gift. This is your total from your mail appeal to this list.

Total from organization list
mailing (and phone bank) \$ _____

5. Mail resolicitation

- Count the number of major donors listed in 1a. Multiply by 15% and then multiply by \$100. This is the likely resolicitation yield from major donors to whom you mail.
- Multiply the number of house parties in 2a by 30. This is your likely number of house party donors. Multiply by 15% and then by \$25. This is the likely resolicitation yield from house party attendees.

Next) \$50,000: A Worksheet

c. Multiply the number of mail donors in 3b and 4b by 15%, then by \$25. This is the likely resolicitation yield from this group of donors.

d. Sum 5a + 5b + 5c. This is your mail resolicitation total.

Total mail resolicitation \$ _____

6. Events

a. Be prepared to invite 250+ people to get 50 to 75 donors to your event. In most instances, known supporters will be responsive to ticket prices of \$35 and \$75 (perhaps a bit higher), when the event features a cash bar, some simple food, modest entertainment and the candidate.

b. You can often supplement the take by making a pitch for additional contributions at the event, and/or by auctioning off a few items in the \$100 price range, such as dinner for two at a nice restaurant.

c. Even if you get most expenses donated, the campaign almost always has a minimum overhead of 20% (such as the cost of printing and mailing the invitation). An event of this size usually grosses \$3,000 and nets \$2,400. Please do not minimize the amount of work required for this result. And never forget that it is the net, not the gross, that determines whether you have made any money!

Total net income from events \$ _____

7. Finance Committee

a. Make a list of your ten most dedicated donors and fundraisers.

b. Select the highest fundraising goal they can each reach if they work hard. In no case should it be under \$1,000. If you don't have 10 people who can each raise \$1,000 or more, then don't form a finance committee.

c. Multiply your finance committee goal by 8, since at least a couple of people will drop out once they realize the hard work involved. This is your subtotal finance committee yield.

d. Subtract from 6c any money you counted already

under 1,2,3,4 or 5 from your finance committee members. This is your total finance committee yield.

Total finance committee yield \$ _____

8. Institutional support

a. Make a list of all party and political organizations, PACs, unions and business groups you intend to solicit for money. For each organization on your list, note the name of your best contact there.

b. Divide your institutional list into three parts:

- i. Institutions that give money to candidates like you
- ii. Institutions that don't, but you have a direct contact
- iii. Institutions that don't, and you have no direct contact

c. List b) iii is very low priority. Don't count these chickens, even if you do have time to reach out to them.

d. Take list b) i and ask the campaign manager to make sure you know and follow each institution's existing process (which is likely to include a questionnaire and interview on a specific timetable). For each, select the amount you think they will give based on their history of giving to candidates like you.

e. Take list b) ii and have a solid volunteer follow up with your contacts to see if you've got a realistic shot, and find out the process. It is probably worth pursuing some of these, so long as their process is not too burdensome. For your two to three best prospects, select the amount you think they would give. Multiply that amount by 25% and that's a reasonable amount to expect for your first election.

f. Sum 8d + 8e.

Total institutional contributions \$ _____

Grand total \$ _____

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Dave Fleischer is the Coordinator of Training for the Gay and Lesbian Victory Fund, training openly gay and lesbian candidates and campaign managers how to run for political office. ■

Recipe for Success: *The Cookbook Fundraiser*

by Elisabeth Ptak

Good cooking is a tradition in the rural communities of western Marin County, California. The fishers, ranchers, organic farmers and just plain good cooks from many cultures who live in the area enjoy a rich and varied culinary heritage. From crab feeds to chicken barbecues, bouillabaisse to tostadas, food is as much a part of community activities as the people who contribute their time and energy to plan and attend them.

At a board meeting of the Dance Palace, a nonprofit community center with an emphasis on the arts located in the small town of Pt. Reyes Station, directors discussed the idea of a cookbook fundraiser for the center's building fund. As so often happens in small communities, the president of the Dance Palace board of directors also served on the board of the West Marin Health Project, also headquartered in Pt. Reyes. Certain that one fundraiser would be better than two, she persuaded the two organizations to collaborate in producing a cookbook that would benefit both.

Getting Started

An enthusiastic core group of ten would-be editors (who also thought there might be some tasty fringe benefits in it for them) gathered together to start the planning process. The first meetings were held on front porches and around kitchen tables, and began as any new project does. The planners had a theme — favorite home-cooked recipes of the Pt. Reyes community — but they didn't know exactly how to get from the original idea to the finished product.

Committee members began by bringing cookbooks from their own bookshelves. Studying these, they concluded that what they wanted was a hybrid of the ubiquitous, spiral-bound fundraiser cookbook and a more professional-looking but still unique book on the order of the *Moosewood Cookbook*.

Largely because of their stated commitment to making a beautiful book that would reflect a diverse population, they had no problem enlisting the help of many talented community members who contributed professional design and production services, including typesetting, writing and editing. The local weekly newspaper

provided work space and the use of word processors and laser printers without charge.

Since cover art is so important, the committee looked at the work of four or five artists before they chose the work of Mary Deleray Russel, whose delightful drawings seemed to capture the West Marin spirit. Her drawings enlivened the cover and, in black and white, the divider pages within. Mary also donated her work.

In many cases, it is the cover that sells the book. Ultimately, however, the success of *Home on the Range* would hinge on attracting a broad range of contributors. A list of the church, school, business, sport and hobby groups each of the organizers belonged to was made. Each person was then assigned the job of soliciting recipes from those groups. In addition, an ad was run in the weekly hometown newspaper, asking for recipes. Hundreds of community members responded, sharing the kinds of recipes that *Tassajara Cookbook* author and West Marin resident, Ed Brown, commented in his forward to the book, are "what we cook for ourselves and cook for our neighbors."

The recipe collection form included the cook's name, address and phone number, the type of recipe and the source or story behind it. For example, in a recipe for "Aunt Leslie's Geography Donuts," the committee wanted to know who "Aunt Leslie" was and what the recipe's name meant so her story could be included in the cookbook. One contributor included a lively story about a Moroccan chicken dish inspired by her first love, and another said her chiffon cake celebrated the end of rationing after World War II. Long evenings were spent sorting through the recipes, eliminating duplicates and checking the lists of ingredients. The committee actually tested only a few of the recipes about which they were most curious; testing all of them is recommended.

Getting into Print

For many organizations, working with a company that specializes in creating cookbooks for organizations is the easiest way to go. These companies offer step-by-step planners and the resulting cookbook, though it has a stan-

Deviled Snapper

JUDY SIMMONS

1 lb filet of snapper (or ling cod, true cod, halibut or sea bass)
juice of 1/2 fresh lemon

2 T tamari or soy sauce
1/3 cup tomato sauce
1 T prepared mustard
1/2 tsp chili powder
4 oz grated sharp cheese

Sprinkle filets with lemon juice. Bake at 350° for 18-20 minutes (steaks for 25 minutes).

Mix all other ingredients in a bowl. When fish come out of the oven, preheat the broiler. Cover filets with mixture and broil until cheese melts and mixture is bubbly.

Grilled Chicken Adobo

NOELEKE GLENN KLAVERT

1 whole chicken, quartered

Marinade

2 cups fresh orange juice
2 cups fresh or canned coconut milk (available at any Asian market)
8 T fresh lime juice
8 T olive oil
1 T garlic, minced
1 cup finely chopped fresh mint
salt and pepper to taste

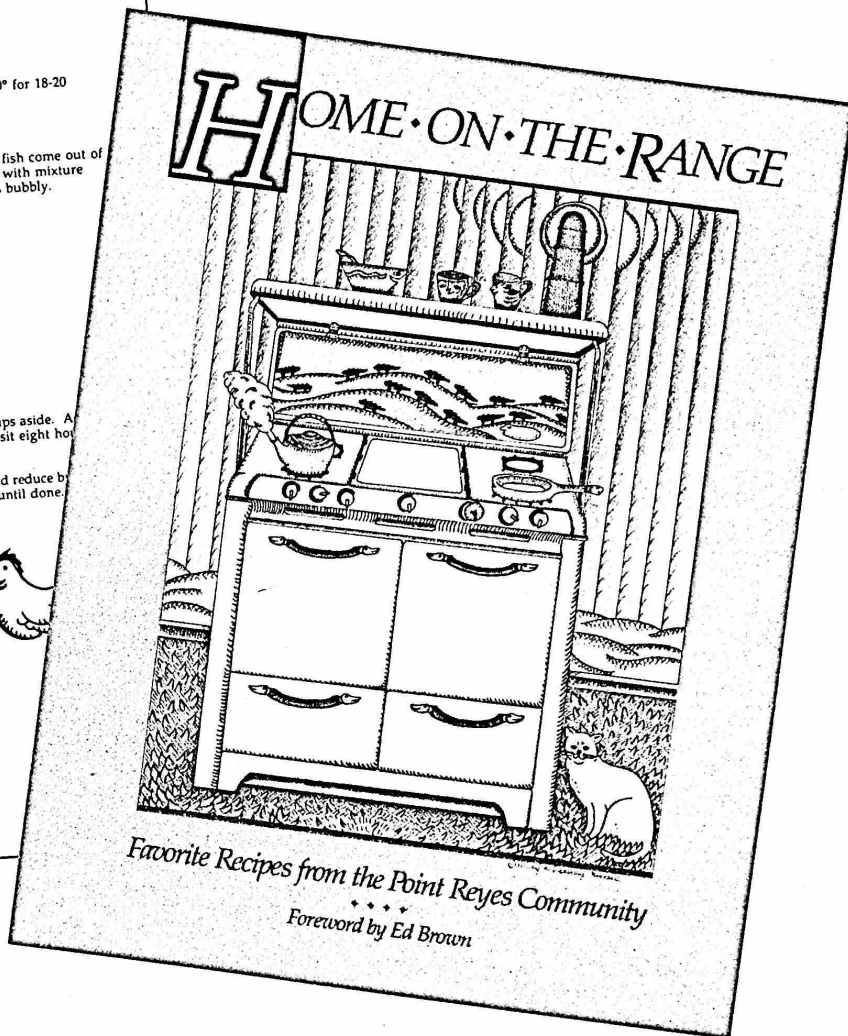
Combine marinade ingredients. Set 2 cups aside. A chicken to remaining marinade and let sit eight hours overnight in the refrigerator.

Put reserved marinade in a saucepan and reduce by cup over medium heat. Grill chicken until done. the chicken and pass the sauce.



50

HOME ON THE RANGE



Favorite Recipes from the Point Reyes Community

Foreword by Ed Brown

standardized format, can be a good source of income. The names of these printers can often be found by looking through other fundraiser cookbooks. Mail-in coupons or 800-phone numbers will give access to information about the company.

Since the organizers of the West Marin cookbook wanted a more individual look, they found a printer who promised the kind of quality they wanted at a price they felt was fair. It was up to the committee to provide camera-ready copy — that is, the pages printed out ready for the printer (we settled for the laser printer at the newspaper and were satisfied with the results). *Home on the Range* was sent to the printer in October. An additional premium was paid to make sure the books would arrive in early December so as to be on hand for an annual holiday crafts fair, but the printer did not meet the deadline. Undaunted, organizers sat at their table at the fair taking prepaid orders for books that, at that moment, they weren't sure when they would see. When the books finally did arrive just before Christmas, the committee members scrambled to deliver or mail those that had been

ordered and get the rest of the books into bookstores, gift shops, grocery stores and bed-and-breakfast establishments.

The best time of the year to sell books is the holiday season, so most printers are at their busiest printing books between July and December. If you plan ahead so that your printing can be done during the off-season, you may be able to negotiate a better price. You certainly can be more confident that your books will arrive when promised. Printing can take up to three months. Be sure to confirm the delivery date with your publisher or printer. If necessary, add additional time for shipping.

Selling the Cookbook

Though cookbooks have a longer shelf life than some books, there is usually a 12-18 month window of peak sale time. Designate at least one person in your group to be in charge of marketing. If you can, ask bookstores ahead of time if they will carry your cookbook. But don't stop there. Local merchants of every type may be willing to

carry it to support your organization and show good will within the community. If the cookbook can be placed near the cash register, you'll have a good chance with impulse shoppers or cookbook collectors or those who want to read something other than the latest sensational news while they're waiting in line.

If you live in an area where tourists visit, make the most of their desire for souvenirs. The cover of *Home on the Range* features a charming drawing of a kitchen range, obviously appropriate for a cookbook, but also a play on the western locale. In addition, the book is subtitled *Favorite Recipes of the Point Reyes Community*, making it a sure attraction for the many visitors to the nearby National Seashore.

You may be able to negotiate a better percentage, but booksellers normally want a 40% discount off the selling price of the book before they will buy it. Even those who will only take your books on consignment — that is, they will pay you only after they sell the books — still want the discount. It is preferable to sell books outright because collection for consignment sales can sometimes be difficult.

A book distributor will usually take an even larger discount. The advantage to using a distributor is that you can reach a wider market because they will do some promotion for you, either through advertising or through a dis-

play in their offices. However, unless your book is a hot seller, they won't be interested for long, and then it will languish unpromoted and unsold.

For *Home on the Range*, it has been more effective for volunteers to take the book around to stores and make the sale in person. You'll need one phone number that stores can use for reordering. Over time, it will be clear which stores are the best for your book. You may decide that selling two or three books every couple of months to that outlying store isn't worth it. At that time, put your energy into your best markets.

By including mail-order information in your book, you may generate reorders from individuals who already have your book but want another as a gift, or whose friends want it but can't find it in their local bookstore.

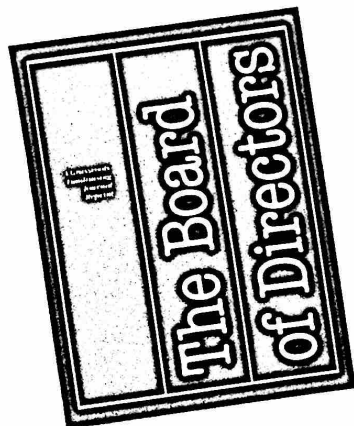
Promoting the Cookbook

We've all seen or bought cookbooks that have hundreds of recipes in them with the name of the contributor next to the recipe. This means that Maybelle Jones, whose recipe for *Yummy Chicken a la Campbell's Cream of Celery Soup* appears on page 29, will probably want to buy at least a few copies — one for herself, others for family and friends. Commercial cookbook publishers

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Use Order Form

have done the math. Some even guarantee that sales of cookbooks will cover the cost of the publication *if* orders of 200 books contain recipes from at least 75 different people, or *if* orders of 201-501 books contain recipes from at least 150 different people, and so on.

The books that Maybelle and your other cooks buy as holiday gifts for relatives will definitely help sales. You'll probably buy quite a few yourself. But you may also want to broaden your market. If you've created a quality cookbook, send it to your area newspapers for reviewing. It may take some persistence and a few phone calls, but it is worth the extra work because a book review can be a big boost for sales. *Home on the Range* was reviewed in several Bay Area newspapers, including the *San Francisco Chronicle*, where food writer Jim Wood called it "a book West Marin can be proud of." The reviews did have an impact on sales.

Contact local radio stations. They may have a food show and would welcome a spokesperson or several of the cookbook chefs on the air to discuss the book and its origin. A bookstore that is carrying the cookbook may be looking for authors to do readings or book signings.

Enhancing the project with related fundraisers

- Have a tasting of the recipes at an old-fashioned supper. Charge \$1.00 a serving, or let the purchase of a cookbook be the cost of the meal.
- Sponsor a pie, cake or casserole contest with small entry fees. Showy prizes are not important. Being known for making the best pie in town means a lot!
- Sell your cookbook at wine tastings, cheese tastings and other food-related events in your community.
- Sell or raffle the original artwork from your cookbook.
- Sell advertising in the cookbook.
- Consider a second edition if sales were very good. Subsequent editions represent higher profit, since start-up costs have already been met.
- Bring out a companion book that features only desserts or main courses or has only vegetarian recipes.
- Have aprons or potholders printed with the cover art and sell them at school or community activities.
- Advertise in the food section of your local newspaper for mail-order sales. Feature quotes from reviews and your cover art.

The Bottom Line

To publish 2000 copies of *Home on the Range*, a perfect-bound 110-page cookbook with 4-color cover, printing costs were around \$5700, including printing and shipping. To date, the net profit on 1500 copies sold (\$12.00 cover price) has been more than \$6000, most of that earned in the first twenty-four months after publication. The Dance Palace and the Health Project will continue to benefit as the original order sells out at the two or three best outlets.

Sharing recipes has always been both the neighborly thing to do and a compliment to the cook, and modern times have not changed the nature of that compliment. Recently, a friend in another city asked me for a particular bread recipe. I told her I'd get it in the mail right away. "I'm really anxious to try it," she said. "Fax it to me." Whether it's a casserole recipe over the back fence or a cinnamon bread recipe sent by fax or by e-mail, a bond is created.

One very satisfying outcome of the project was the money earned for the two nonprofit organizations that serve the community. Another was the immeasurable sense of pride and accomplishment the members of the cookbook committee feel each time they see the book for sale in a store or use one of its recipes in their own kitchen.

Like an outline for a fundraising project, a recipe is more than just a list of ingredients and steps. Gathered into a special cookbook, it's a treasure box which, when opened, releases the love, warmth and skill of a whole community. Whether cooks rely on oven timers or trust their noses to know when that special cake is done; whether they cringe in indecision at the notation "optional" or enthusiastically add every possible variation; whether the organization works best with clearly defined guidelines or likes to take a basic idea and "season to taste," the final outcome depends on that mix of hard work, luck, ingenuity and dedication that is the hallmark of all nonprofit fundraising. ■

Job Announcement

Coordinator of Development and Membership Involvement

The Labor Community Strategy Center is a multiracial social justice organization of more than 250 members in Los Angeles focussing on grassroots organizing and policy development to create a counterforce to the power of multinational corporations.

Responsibilities: Coordinating fundraising in the existing areas of membership dues, sustainer and major donor programs, as well as some work with foundation fundraising.

Main qualifications: General agreement with hard-hitting grassroots anti-corporate politics; track record of successful fundraising experience; excellent speaking and writing skills; willingness to take initiative and work collectively.

Starting date: Open until the right person is found. Please send references, written statement of your interest and writing examples to Georgia Hayashi, 3780 Wilshire Blvd, Suite 1200, Los Angeles CA 90010. (213) 387-2800.

Book Reviews

by Kim Klein

A number of excellent books have piled up on my review shelf over the past several months. I have finally taken the time to read them. Here are short reviews of four of them. At the end of the review is a separate list of other books and publications that are worthy of mention. Take advantage of August to get caught up on your reading. Most of these books can be found in the Foundation Center Collection nearest you.

Face to Face: How to Get Bigger Donations from Very Generous People

Ken Wyman

196 pages

Voluntary Action Directorate,
Multiculturalism and Citizenship,
Government of Canada

Available free from:

Ken Wyman and Associates, Inc.

64B Shuter St.

Toronto, ONT M5B 1B1

CANADA

Ken Wyman's new book is an excellent guide to almost everything you could want to know about identifying and approaching major donors. There are separate and detailed sections on how to find the right donors, how to know the right time to ask, how to decide what project and what amount to ask for, and how to structure the approach. There are also worksheets to help in identifying prospects and in planning fundraising campaigns. Two appendices offer exercises in identifying prospects and asking for money. Wyman has years of experience working with grassroots organizations in Canada and his easy-to-read style allows him to impart hundreds of important details without getting bogged down. This book was funded by the Canadian government and the price — free — couldn't be better.

Making Dollars and Sense Out of Fees for Service

Ronald Elling and Gerald L. Glandon

The book: 120 pgs. \$33.45.

The software: \$43.45.

Ordered together: \$53.45.

Prices include postage and handling.

To order write:

Illinois Alliance for the Aging
327 South LaSalle, Suite 920
Chicago, IL 60604

This book and its accompanying software were actually published in 1991, but I only learned about them a few months ago from Joan Flanagan. Joan noted that this book was the only one she knew of to really explore charging fees for service that addressed not only how to charge, but how to be fair, how to move from a service that has been free to one that charges, and so on. This book was developed for the Illinois Alliance for the Aging and is focussed on programs serving seniors, but would be useful to any direct service program.

The manual contains six main chapters and four appendices, and is organized as answers to questions a manager would have to address in order to implement fees or suggested contributions. The questions answered in chapter length form include, "Why generate additional income?" "Why consider a fee or suggested contribution policy?" "Who should be involved in making the decisions?" "What kinds of policies can be put in place?" "How do you estimate service costs?" and, "How do you implement fees or suggested contributions?"

The philosophy behind the book can be found in the foreword, which is written by Robert Mayer, the President of the Rothschild Foundation, which funded the development of this technical assistance manual. Mayer says, "The purpose of this manual is to help managers of community organizations rethink, on a very fundamental level, how to approach the business of serving the older adult community. And make no mistake, you are in a business. ...If you are among those who believe that the revenue-expense equation is only an issue in the world of for-profit business, take a long look at the list of providers who are no longer part of tomorrow's vision because they were forced to merge or close their

doors today."

The manual is excellent: readable, to the point, filled with examples. The software, called the "Sliding Scale Generator," is a spreadsheet, and a real added bonus. It comes with a 12-page instruction guide, which is critical since the program is based in Lotus 1-2-3, which is not user-friendly (or at least not very friendly to this would-be user). You can figure out what the fee scale or suggested contributions might look like for your agency, based on a number of programmed variables, and then print out tables to use in your agency.

Many organizations that have decided to use some form of fee for service or voluntary donation for service never really implement their policy because of how difficult it is to figure everything out. This book and software will take all the guesswork out of it for you.

**Foundation Giving:
Yearbook of Facts and Figures
on Private, Corporate and
Community Foundations**

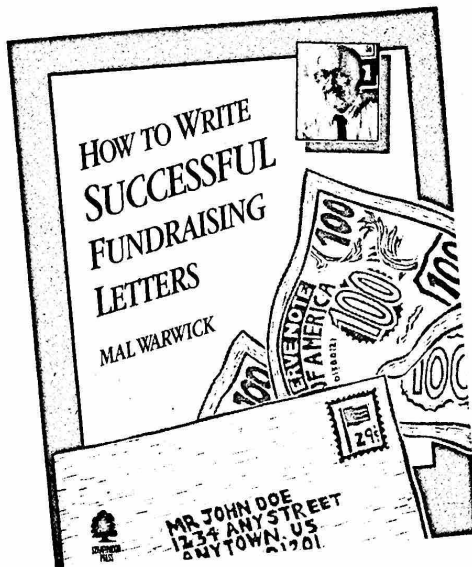
Loren Renz and Steven Lawrence
The Foundation Center, 1994.
\$24.95 plus \$4.50 shipping for first
copy, \$2.50 each additional copy.

Order from:

Foundation Center
79 Fifth Avenue
New York NY 10003-3076

U.S. foundations distributed more grant dollars in 1992 than in any previous year. In fact, the nation's foundations contributed more than \$10.2 billion to nonprofit organizations in this country and abroad. Foundation assets grew as well, gaining 5%, to \$177 billion, suggesting a potential for continued increases in grantmaking programs.

These findings are documented in the new 1994 edition of *Foundation Giving*, a comprehensive overview of U.S. foundations. This authoritative, up-to-date study tracks the growth of foundation assets and grants, documents the growth of new foundations, and analyzes changes in



the giving priorities of the nation's grantmakers. The new edition of *Foundation Giving* concentrates on giving trends in 1992, but also shows broader historical patterns and forecasts both the short- and long-term outlooks for the field.

Foundation Giving analyzes foundation grants by subject category, type of support, population group served, geographic area and other giving criteria. The analysis of grants awarded in 1992 indicates key trends in the field:

Grants to education remain a high priority. Education has once again received more foundation grant dollars than any other major subject area, netting one-quarter of all foundation grant dollars. Nearly two-thirds of this money went to higher and graduate education, more than one-fourth to elementary and secondary education.

Health ranks second by grant dollars. Foundations directed nearly 18% of grant dollars to health-related institutions and projects, the highest level of funding recorded since 1989.

Human services garner larger share. Human service agencies and projects captured 16% of grant dollars, up from the previous year, and received one-fifth of the number of grants.

Special populations targeted. Foundations directed one-third of

grant dollars to specific populations, among them children and youth (13.3%) and minorities (9.6%).

These points represent only a few of the important statistical findings derived from an analysis of more than 65,000 grants of \$10,000 or more reported by 960 grantmakers. The grants studied represent more than 50% of all foundation grant dollars awarded in 1992.

**How to Write Successful
Fundraising Letters**

Mal Warwick
251 pages, hardcover. \$39.95.

Order from:

Strathmoor Press
2550 Ninth St, Suite #103
Berkeley, CA 94710-2516

This is Warwick's fifth book and continues his tradition of providing a lot of specific examples of direct mail packages with crisp explanations of what worked and didn't work in each package. Warwick's writing style has a certain direct-mail quality to it — short sentences, repeating important points many times, good use of humor, and lots of anecdotes. In addition to analyzing a number of direct mail packages, there are also case studies of the use of direct mail over a period of time and hundreds of tips on writing appeal letters, getting people to open the envelope, and building donor loyalty over the long term. The book is full of illustrations of letters, reply devices, return envelopes, teaser copy and so on. This is Warwick's best book so far, and reflects all that he has learned over his many years in direct mail fundraising. Warwick is a master at this form of fundraising, and readers can learn a lot from him.

Short Takes

The following books and periodicals deserve mention. The brevity of these mentions is not meant to imply that they are less worthy than the books noted above. They simply

take less space to describe and, in several cases, have a more limited audience.

**Shaking the Money Tree:
How to Get Grants and
Donations for Film and Video**

Morrie Warshawski
178 pages. \$24.95

Order from:

Michael Wiese Productions
4354 Laurel Canyon Blvd., Suite 234
Studio City, CA 91604
Or call 800-379-8808

There are very few books written on this subject, so any addition is bound to be helpful. This book is half a how-to and half appendices that include sample grant proposals, recommended reading, and a reprint of a very interesting interview with Peter Adair on raising money from individuals.

**Writing Effective News Releases:
How to Get Free Publicity for
Yourself, Your Business, or**

Your Organization

Catherine V. McIntyre
176 pages. \$16.95.

Order from:

Picadilly Books
P.O. Box 25203
Colorado Springs, CO 80936

This excellent book is one of the better bargains available on this topic. MacIntyre is a newspaper columnist and reporter, as well as an advertising copywriter. Her experience is well documented here. Lots of examples and tips.

**Fiscal Sponsorship:
6 Ways To Do It Right**

Gregory L. Colvin
82 pages. \$12.95

Order from:

Study Center Press
1095 Market St., Suite 602
San Francisco, CA 94103

This is the first (and possibly only) book to explain clearly the murky world of fiscal sponsorship. It will be

helpful to anyone seeking a fiscal sponsor and to any nonprofit providing or thinking of providing that service for a person or a project. Colvin is one of the nation's experts on nonprofit law, his writing style is clear and easy to follow, making his important information extremely accessible.

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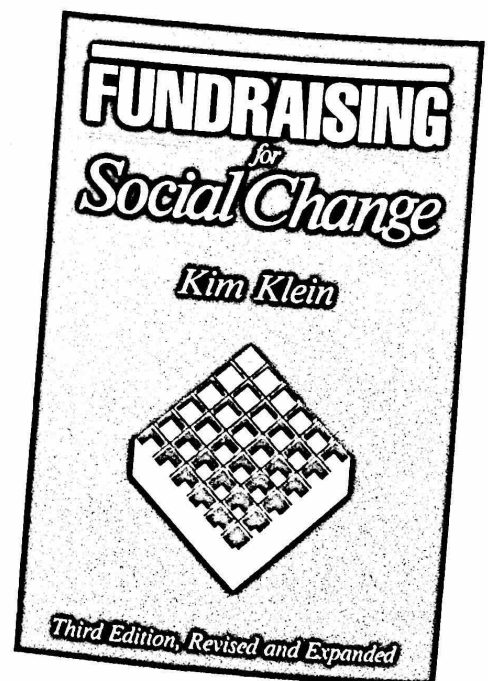
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