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Grassroots Fundraising Journal

In This Issue:

Writer's Guidelines

*The **Grassroots Fundraising Journal** is happy to consider articles for publication. Please submit copy **typed, double-spaced.** If computer-generated, please submit highest quality printing possible (no dot matrix print-outs, please). Please do not submit material typed in all capital letters.*

*Articles will be considered for publication during the nine months following submission. When an article is accepted, you will be notified in which issue of the **Journal** it will appear. The **Journal** provides three copies of published material to the author and pays $75 per article after publication.*

If you want unpublished articles returned, please provide a self-addressed envelope with adequate postage.

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In This Issue

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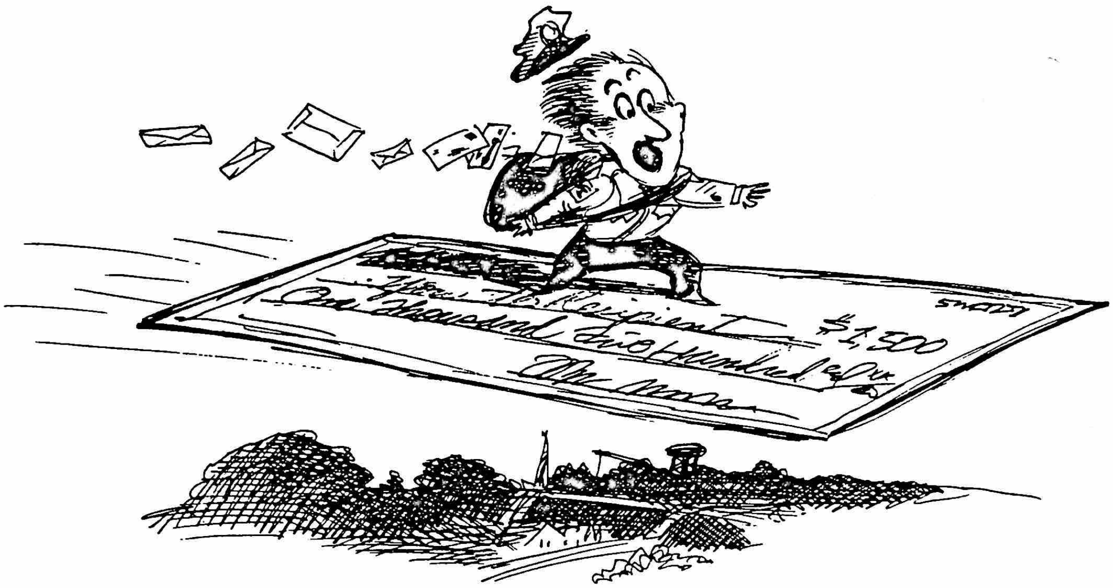


Effective Return Envelopes

by Kim Klein

In direct mail parlance, the self-addressed return envelope is called the "response vehicle." One imagines an envelope with a small motor attached and four wheels careening along carrying the life-saving check from the donor to the organization. I used to think that calling the return envelope the "response vehicle" was a direct mail conceit, but now I think that phrase helps us to conceptualize it as part of the whole direct mail package with more of a role to play than just providing an added convenience for the donor.

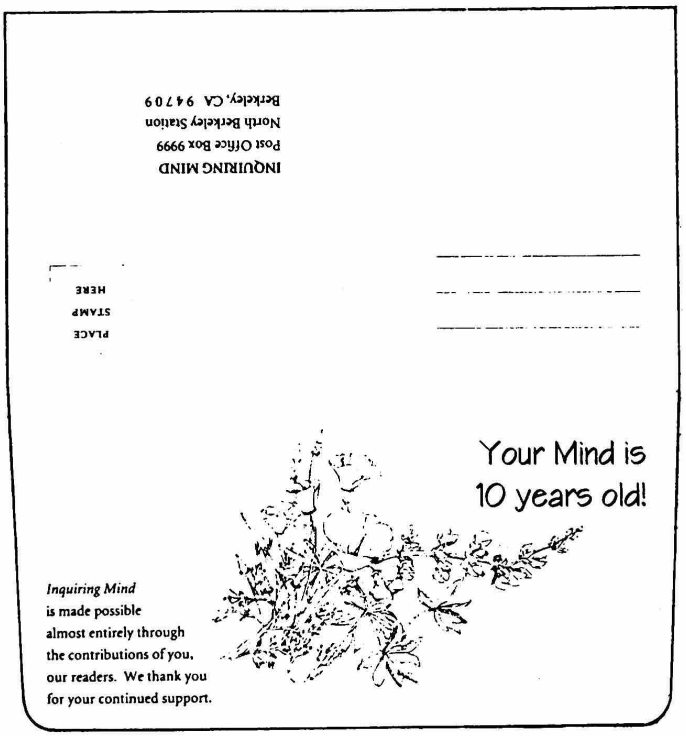
Understanding the need to think through your return envelope comes from the increasingly common habits of how people respond to direct mail. They get your letter in the mail and open the envelope (because you have used what you have learned in the *Journal* about making carrier envelopes inviting). They glance at the letter and think, "I'd like to help this group" and then they put the letter aside and look at the reply device (the card that goes with the envelope or the flap of the envelope, if the group has used a wallet flap-style return envelope) to see how much it will cost to help this group. If they are satisfied with what it costs, they take the envelope and possibly the card and put it in a file or a pile with the rest of their bills. Several days or possibly weeks later, they go to the file to pay some bills and find your envelope. Now the envelope and the return card must recreate the sense of wanting to give that the whole package originally created. Unfortunately, more often than not, this does not happen, and under the pressure of the other bills, the prospect throws your appeal away.

The envelopes depicted here present a cross-section of envelopes that use their space very well and, in little and big ways, inspire the prospect to give.

The Wallet Flap Envelope

The main advantage of a wallet flap-style envelope is that the return card cannot get separated from the return envelope, since they are the same. Sometimes they are more expensive to print than an envelope and a separate card and sometimes less, so if your printer charges you less for them, that will be an advantage. They are also easier to staple into a newsletter or annual report and they are very easy for board members to give to friends or to hand out at a special event.

If you use a wallet flap envelope, use all the sides of it to convey your message. For example, the envelope shown below is for a donation to help support the Vippasana Buddhist journal, *Inquiring Mind*. The printing is a very restful blue color on a white paper stock; it has some lovely line drawings of flowers. The mood it creates is peaceful and quiet. The outer flap reminds people that the publication is almost entirely reliant on contributions, and plays on

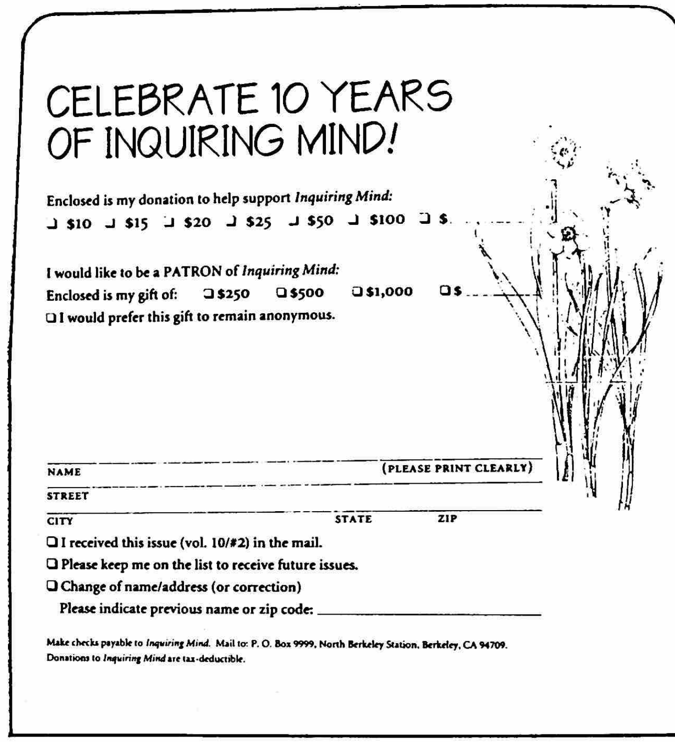


INQUIRING MIND
Post Office Box 9999
North Berkeley Station
Berkeley, CA 94709

PLACE
STAMP
HERE

Your Mind is
10 years old!

Inquiring Mind
is made possible
almost entirely through
the contributions of you,
our readers. We thank you
for your continued support.



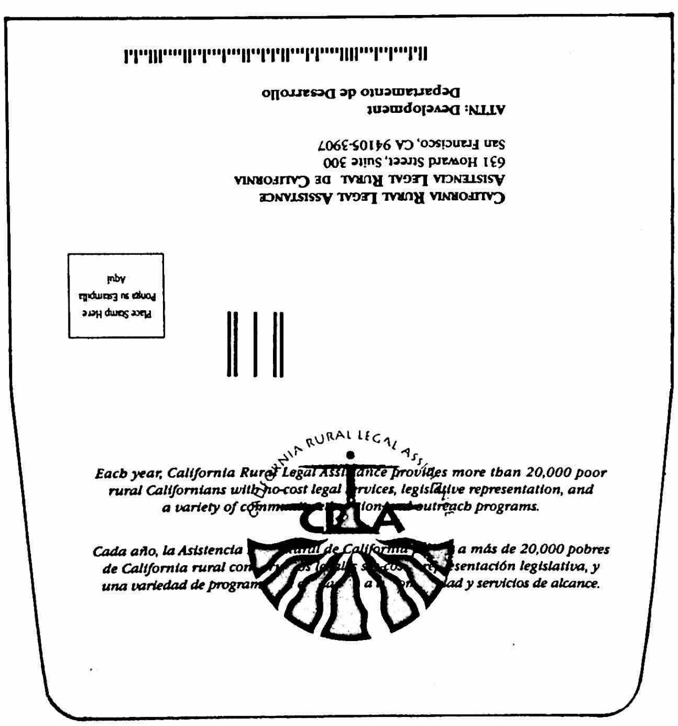
CELEBRATE 10 YEARS
OF INQUIRING MIND!

Enclosed is my donation to help support *Inquiring Mind:*
❏ $10 ❏ $15 ❏ $20 ❏ $25 ❏ $50 ❏ $100 ❏ $ ______

I would like to be a PATRON of *Inquiring Mind:*
Enclosed is my gift of: ❏ $250 ❏ $500 ❏ $1,000 ❏ $ ______
❏ I would prefer this gift to remain anonymous.

NAME ______ (PLEASE PRINT CLEARLY)
STREET ______
CITY ______ STATE ______ ZIP ______
❏ I received this issue (vol. 10/#2) in the mail.
❏ Please keep me on the list to receive future issues.
❏ Change of name/address (or correction)
Please indicate previous name or zip code: ______

Make checks payable to *Inquiring Mind*. Mail to: P. O. Box 9999, North Berkeley Station, Berkeley, CA 94709.
Donations to *Inquiring Mind* are tax-deductible.

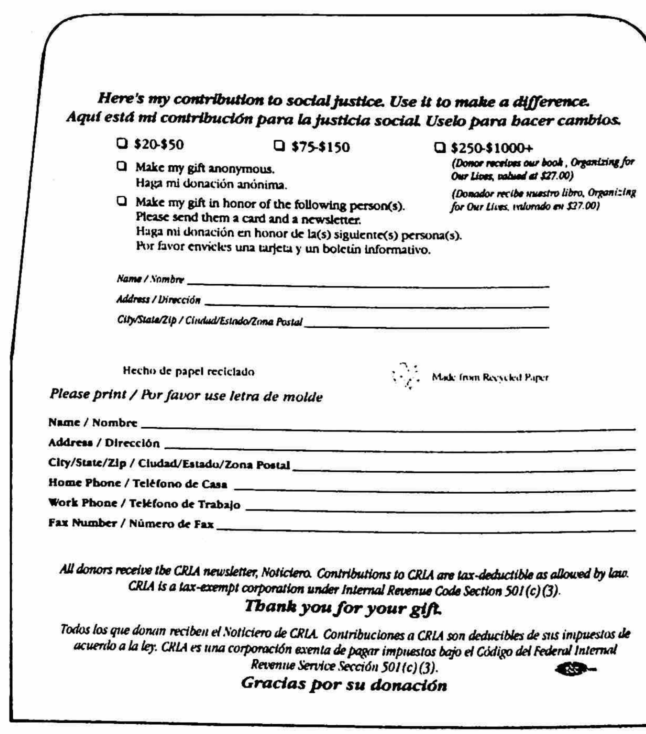


California Rural Legal Assistance
Asistencia Legal Rural de California
631 Howard Street, Suite 300
San Francisco, CA 94105-3907
ATTN: Development
Departamento de Desarrollo

Place Stamp Here
Ponga su Estampilla
Aqui

Each year, California Rural Legal Assistance provides more than 20,000 poor rural Californians with no-cost legal services, legislative representation, and a variety of community education and outreach programs.

Cada año, la Asistencia Legal Rural de California ... a más de 20,000 pobres de California rural con ... representación legislativa, y una variedad de program... y servicios de alcance.



Here's my contribution to social justice. Use it to make a difference.
Aquí está mi contribución para la justicia social. Uselo para bacer cambios.

❏ $20-$50 ❏ $75-$150 ❏ $250-$1000+
(Donor receives our book, Organizing for Our Lives, valued at $27.00)
(Donador recibe nuestro libro, Organizing for Our Lives, valorado en $27.00)

❏ Make my gift anonymous.
Haga mi donación anónima.
❏ Make my gift in honor of the following person(s).
Please send them a card and a newsletter.
Haga mi donación en honor de la(s) siguiente(s) persona(s).
Por favor envíeles una tarjeta y un boletín informativo.

Name / Nombre ______
Address / Dirección ______
City/State/Zip / Ciudad/Estado/Zona Postal ______

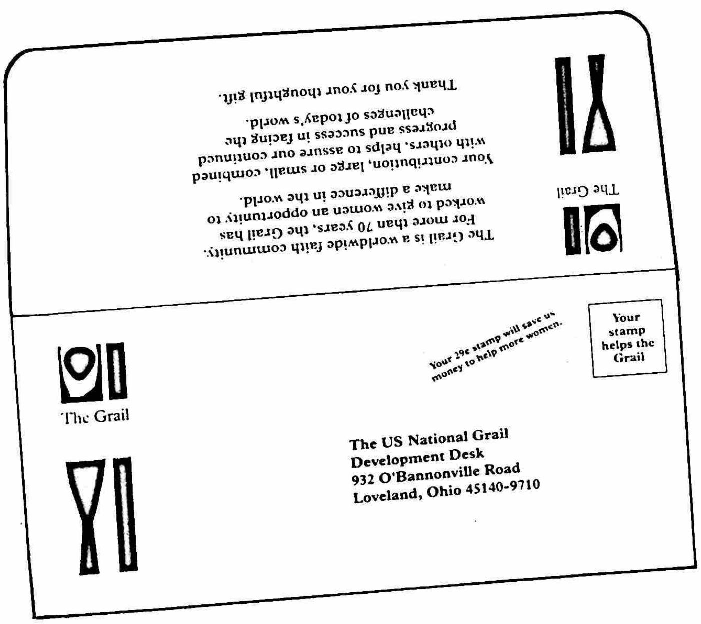
Hecho de papel reciclado
Made from Recycled Paper

Please print / Por favor use letra de molde
Name / Nombre ______
Address / Dirección ______
City/State/Zip / Ciudad/Estado/Zona Postal ______
Home Phone / Teléfono de Casa ______
Work Phone / Teléfono de Trabajo ______
Fax Number / Número de Fax ______

All donors receive the CRLA newsletter, Noticiero. Contributions to CRLA are tax-deductible as allowed by law. CRLA is a tax-exempt corporation under Internal Revenue Code Section 501(c)(3).
Thank you for your gift.
Todos los que donan reciben el Noticiero de CRLA. Contribuciones a CRLA son deducibles de sus impuestos de acuerdo a la ley. CRLA es una corporación exenta de pagar impuestos bajo el Código del Federal Internal Revenue Service Sección 501(c)(3).
Gracias por su donación

the name of the journal to show its longevity with the phrase, "Your Mind is 10 Years Old." Inside, there is a place to indicate your donation and your name and address, and there are more flowers. There is plenty of room at the bottom of the envelope for the top to be sealed without losing any information.

California Rural Legal Assistance has published their envelope in both English and Spanish. Notice that all the text is in both languages, even the line that the envelope is made from recycled paper. The outer flap of this envelope shows both the logo and the mission statement. Reprinting your mission on your envelope will remind people of why they wanted to give. For this group, including both languages emphasizes their commitment to reaching rural people, many of whom are Mexican farmworkers, while at the same time showing that everyone is invited to give. This envelope is printed in red ink on white paper, which reminds people of the UFW colors. Unfortunately, it is a hard color for visually impaired people to read.

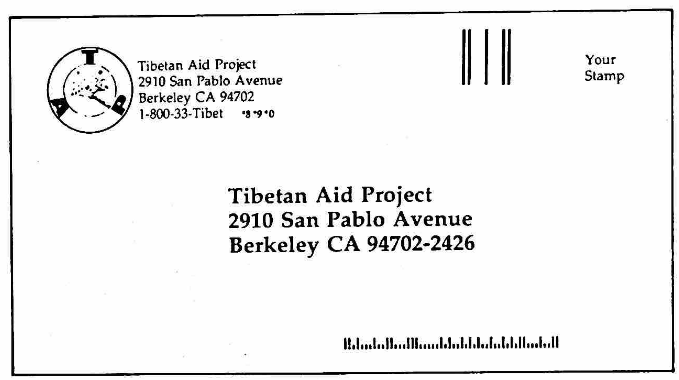


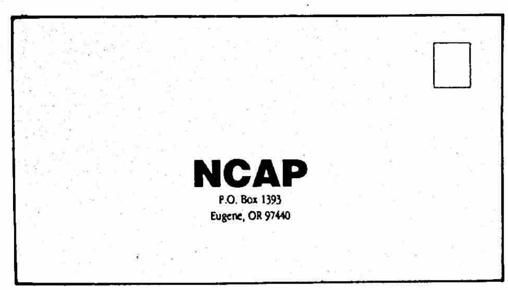
The wallet flap envelope from The National US Grail uses the left-hand side of the front of the envelope to restate the vision along with the logo. The small print reads, "Building Justice and Solidarity, Facing Cultural Changes, Contributing to the Survival of the Planet," and then at the bottom of the logo, "An International Women's Movement." This logo and vision statement are repeated on the back flap with a fuller explanation. This envelope has done a good job of reinforcing the name of the group with the vision of the group.

Envelopes Accompanied by a Card

The next two envelopes are accompanied by return cards, but still show good use of space. If the card were to become separated from the envelope, the envelope itself could remind a prospect of why he or she wanted to give.

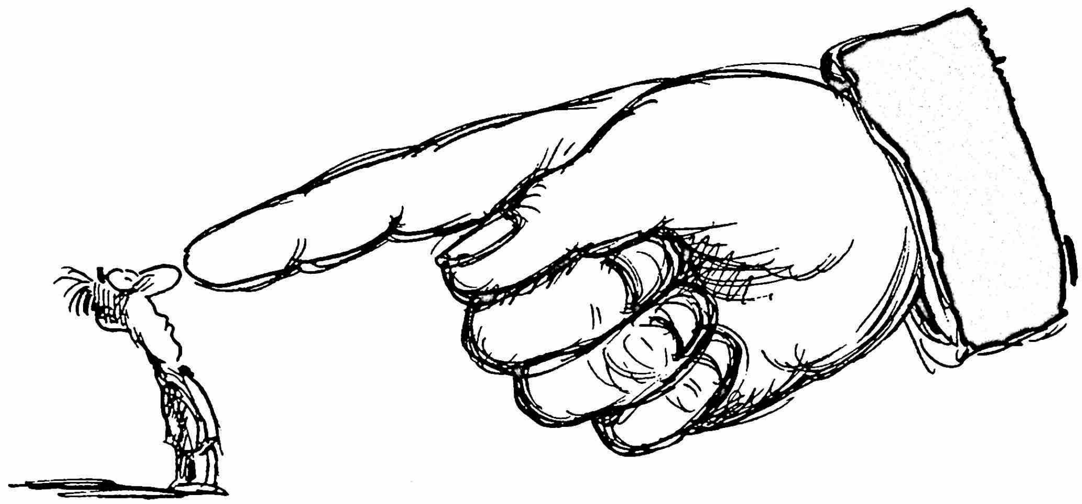
The Tibetan Aid Project uses a #8 envelope (larger than the usual #6 or #7), which stands out in the pile. The large bold print of their address is easy to read, and they have put their address in the upper-left-hand return address space also. This does two things: it saves donors from having to write their own return address and it insures that the envelope will get to to the group whatever happens, and it gives them a chance to display their logo. This is an inner circle with a drawing of a Himalayan mountain top with the sun on one side and the moon on the other, ringed by an outer circle containing the group's initials, TAP. The logo is striking and reminds you of the rich culture that this project seeks to protect and preserve. The return address also includes their phone number.





NCAP, the Northwest Coalition for Alternatives to Pesticides, uses a plain brown envelope on the back of which is a logo showing that the envelope has been made with a dioxin-free paper process. Since alerting the public to the many sources of dioxin and its possible health hazards is a large part of this group's work and their direct mail letter, this will remind donors of why they want to give.

Return envelopes cannot do everything by themselves, but these examples show that they can do more than one might think. At little or no extra cost, you can use your return envelopes to remind people of your mission, show you are consistent in your politics by using union printers, recycled paper, appropriate colors or whatever your donors would reasonably expect of your group. Envelopes should be seen as blank canvasses on which as much as is appropriate and possible can be filled in with information and messages about your mission and your need for money. ■



Who's to Blame When Nonprofit Executive Staff Mess Up?

by Bob Zimmerman

In recent weeks, the [San Francisco] Bay Area press has been hot on the trail of local nonprofit organizations that allegedly have mismanaged funds, failed to submit timely reports to donors, and apparently have only the haziest understanding of program and fiscal accountability.

While bad press hurts the entire nonprofit community, the reaction of certain executive directors and board members is a tad difficult to fathom. "Why pick on us?" they ask. "We're working long hours at low pay on behalf of good causes and therefore can't be expected to dot every i. And besides, look at the huge financial scandals in the for-profit world!" There have even been accusations of racism and homophobia leveled at reporters who have had the gall to point out the administrative shortcomings of certain nonprofits.

Sorry, folks, but this won't wash. The fact that nonprofits are usually on the side of the angels doesn't mean that they should be excused from standards that protect donors, the public and the nonprofit community. To ignore these standards is to invite disaster.

What are some of these standards?

1. Nonprofits that receive grants must file timely fiscal and narrative program reports with grantors. I can't tell you how many times I've heard foundation program officers bemoan the fact that they hadn't heard a word from nonprofits that had received substantial grants from their foundations. This is both terribly impolite and destructive to future fundraising. Remember: your best prospect for a contribution is someone who has already made a contribution.

Always send a prompt thank-you letter upon receipt of a grant. With reference to reporting, I recommend sending an interim report to the donor — say six months into the life of a one-year project — as well as a final report, even if an interim report is not required. This sort of apple-polishing will have a very positive impact on the grantor.

2. Nonprofits must keep financial books that provide

comprehensive, easy-to-access information concerning the use made of all income. Don't fall prey to the "trust us" attitude as in: "Give us the money and we'll put it to good use. Trust us." Donors are justifiably paranoid concerning the use made of their funds. Overcome their paranoia by giving them the fiscal information they require in full and on time.

3. Take your administrative responsibilities as seriously as your program responsibilities. Let's face it: most executive directors and other nonprofit executive staff would rather be doing the substantive work of their programs than be bothered with tedious administrative details. What dance company director would rather put budgets together than choreograph the next production? What legal aid exec would rather prepare job evaluations than litigate a hot case?

The fact is, if you've taken on executive responsibilities in your nonprofit, you must be equal to them, and you must give them the serious attention and the time they deserve. Your client population/community/audience deserves nothing less.

The individual who becomes the executive director of a nonprofit is often the person who is most skilled at the substantive work of the organization. He or she may not — often does not — have managerial or administrative skills. *It is therefore incumbent upon the members of the board of directors of the nonprofit to make sure that the executive director is trained to deal with such issues as fundraising, donor reporting, budget preparation, personnel and long-range planning.*

Unfortunately, in the eyes of most donors, nonprofit administrative issues are not "sexy." It's a lot harder to find funding to send an AIDS project's executive director to a three-day training on personnel issues than to secure a grant for additional services to the client community. Of course, without the personnel training, things may reach such a nasty state at the organization that services to clients will be suspended or eliminated.

For-profit companies spend hundreds of millions of dollars annually to train managers. They understand that management skills are every bit as valuable as production skills. It's high time that the nonprofit community — including donors — learns this critically important lesson. ■

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Bob Zimmerman is a principal of Zimmerman Lehman & Associates, a fundraising and management consulting firm working exclusively with nonprofits.

When in Doubt, Think

by Andy Robinson

Editor's note: Fundraising consultant Andy Robinson has pulled a lot of what he calls "common sense" ideas together here as a useful reminder and helpful perspective on some basic fundraising tenets.

The love of money, says the Bible, is the root of all evil. After fifteen years working with social change organizations, I suspect that the *lack* of money creates just as many problems. Many of my colleagues, clients, and students sing the same song: "If we only had $_____" (go ahead, fill in the amount), "we could save the world."

Unfortunately, our frustrations about money, or the lack of it, tend to blind us in a couple of ways. First of all, we forget our other organizational assets, things that have no relation to the bank balance. Second, we get obsessive about the subject, which limits our capacity for good, hard-headed planning.

So before you begin raising money, step back, take a deep breath, and consider the following issues.

1. Money is just a tool. It's important only because of what it can buy your organization. There are always other tools available. What you lack in money, you may be able to make up for with the skills, talents, enthusiasm and track record of your members, supporters, and staff. Money, in and of itself, has no value.

2. Do you really need the money? In other words, are there other ways to get what you need? Consider in-kind donations,barter, free advertising, etc. For example, used office equipment is often donated by larger companies (in exchange for a tax write-off) or government agencies. Many professionals — lawyers, accountants, graphic artists, entertainers — will contribute their services or work for a reduced fee if you know how to ask. For example, you may be able to get printing, or a hall for a meeting, in exchange for an ad in your next event program. As a rule, the less cash you need, the better off you'll be. It's always easier to get in-kind contributions.

3. Money is not a dirty word. To paraphrase Joan Flanagan, author of *The Grassroots Fundraising Book*, money is like sex: everyone thinks about it, but most people are uncomfortable talking about it. This is especially true when it comes time to ask for donations. Remember, people contribute because they want to; they believe what your organization does is worthwhile. Many consider it a privilege to donate, but you have to ask first.

4. Fundraising is selling. Another dirty word rears its dirty head. "Selling" conjures up images of car sellers and Madison Avenue hype. What I'm suggesting is a systematic way of analyzing your situation and playing to your strengths.

Who is your market, your audience? Why do they care about your organization/issue/service/product? How can you reach them most effectively and efficiently? How can you expand your market? Is it possible or necessary or even ethical for you to adapt your product (organization) to reach a larger market?

Forgive the advertising lingo, but if we want professional results, we need to borrow a page from the professionals. To work best, your fundraising must be systematic.

5. Fundraising is organizing. Ideally, in the process of raising funds, you'll also be building your organization, developing leadership, increasing community awareness of what you do, etc. The best fundraising strategies succeed at both bringing in the bucks and furthering your program goals.

6. Fundraising is hard work. Never underestimate the time and energy required. I have yet to find an "easy" way to raise money. On the other hand, it shouldn't be complete drudgery, or no one will help. *Fundraising should also be fun.*

You Still Need Cash

You still need cash, right? In selecting potential fundraising strategies, keep the following concerns in mind:

1. The Work-to-Profit Ratio. A quickie $200 house meeting might be worth a lot more in the long run than a time-consuming auction that nets $1,000. Choose projects that are work-intensive only if you have lots of dependable workers. Assume from the beginning that the fundraiser will take twice as much work as you estimate. If it looks like too much trouble, choose another project.

2. Build fundraising into your program. While raising money, you also want to educate people about your group and your issue. Even better, you want to get them involved.

For example, an organization advocating for clean water could sponsor a trash-a-thon, where volunteers would solicit "pledges by the pound" for garbage they collect along the local river bank or lake shore. This would create three opportunities at once: it would raise funds, give people a direct and visceral experience of how pollution affects their water supply, and gather media attention for the organization and the issue. (The more disgusting the trash, the better the news coverage.) On the other hand, an organization lobbying for law-and-order issues would not want to raise money by robbing a bank.

3. *Be creative.* The old standbys are fine, but don't be afraid to invent something new. There's nothing wrong with a gimmick *if it works.*

4. *Give yourself plenty of lead time.* Some major fundraising events or strategies can take a year or more to organize. If you need money now, pick a modest project and do it well. Stay within your management capabilities and your budget.

5. *Minimize expenses.* Get donations of everything: materials, printing, services, entertainment, etc. If you can't get the stuff donated, try to get it at cost. Improvise what you can't afford. Remember, net income equals receipts minus expenses, *so keep your expenses down.*

6. *Promote your activity.* This is crucial for any kind of benefit event. If nobody knows what you're doing, nobody will come. Press releases, public service announcements, flyers and targeted mailings are all inexpensive ways to get the word out. Be wary about paid advertising; for many events, it's not cost-efficient.

7. *Set specific goals.* Set goals for net income, response rate, audience size, number of volunteers participating, etc. Without specific goals, you'll have no way to monitor your progress as you organize the project. Most important, *do the math first.* Without numbers, your planning is reduced to guesswork and you will likely lose money instead of raising it.

8. *Assume success but plan for the worst.* Something will go wrong. Adapt. Be quick on your feet. Trouble-shoot. Solve the problem first, then try to figure out how you can prevent it from happening again in the future.

Most of this is common sense, but our fears and frustrations about fundraising can paralyze us or cause us to do crazy things. If you take the time to analyze, evaluate, and plan, you'll raise more money, make more friends for your organization, and feel better about your efforts. When in doubt, think. ■

Andy Robinson is Development Director for Native Seeds/SEARCH, a regional conservation group in Tucson, Arizona, and also works as a trainer and consultant. His new book, Grassroots Grants, *will be published this fall by Chardon Press.*

The Annual Planning Calendar:

How to stop letting the work manage you

by R. Daniel Shephard

If you are a manager in a not-for-profit organization, I think it's safe to assume that you have been, or currently are, where I was in October 1989 when I accepted the position of Director of Development and Alumni Relations at The Linsly School in Wheeling, West Virginia. As Linsly's first full-time development professional, I found myself responsible for two jobs, departmental records all of 18" high, and only a part-time secretary. The independent college preparatory school had completed the leadership phase of the largest capital campaign in its 127-year history and had hired a professional fund raising consulting firm to support that effort, but was waiting for the new development director (me) to arrive before moving into the public portion of the campaign. Then, barely three months into the job, I was assigned additional responsibility for marketing and public relations. Great expectations, limited resources — pretty similar to your own situation, I bet.

I'm not complaining; I accepted the job knowing full well the challenge ahead of me. I welcomed the responsibility and the chance to succeed. More to the point, I know that you know the sort of situation I have just described.

Development officers (and other not-for-profit managers) all too often find themselves caught in some crazy combination of crisis and opportunity, each of which requires immediate action. The boss makes it clear that funds must be raised for stabilizing the institution or for funding a new campaign. And the governing board is anxious for you to succeed, yet hesitant to become too intimately involved in implementation.

Suddenly you realize that your problem is no longer raising the money expected of you, but figuring out what to do first, and what to do after that, and how to fit in that surprise assignment given you the day after you get everything settled.

At Linsly two things made the difference in my ability to manage all that was expected of me. My headmaster understood the situation and provided staff support. Within three months I had the services of a full-time development assistant and a part-time alumni secretary. By spring the three of us made a promise to ourselves: we would not live our second year the way we were struggling through our first.

Being an inveterate planner, I decided the way out of the chaos would be to develop a calendar for the 1990-91 fiscal year. It would organize the myriad tasks for which we three were responsible, spreading the work out over the entire 12 months of the year. (It's true; one can only eat an elephant a bite at a time!) This organizational breakdown would allow us to pay attention to details and donors, leaving time for the unexpected. We would embark upon a fund raising methodology in which I firmly believe — market segmentation. We would even schedule time for organizational details, such as inventorying office supplies and closing the books at the end of the year. We were excited about the project, and we looked forward to mapping out the calendar for the next year.

Ironically, our first hurdle was simply to find time to plan our first calendar. This, I believe, is the critical moment of inertia that must be overcome in any such effort. Deciding to make a change is often the "Catch-22" of opportunity. Our motivator at Linsly was simple; we reminded one another of the frustrating year we were currently experiencing and decided that it would be worth spending a Saturday together at my house planning what we would do next year.

The design is based on a simple philosophy that I refer to as the Development Cycle. Each year I make sure that each donor constituency is cultivated, solicited, then acknowledged. The magic of this approach is that acknowledgement turns into further cultivation and kicks off the next cycle.

From that point, planning was simple. We listed each constituency group we wanted to identify and approach for support *(see box)*. We noted all the support functions for which our little office was additionally responsible, including fiscal deadlines and office procedures. The key to the entire calendar was the annual school calendar, which was provided by the headmaster in late spring. All of our departmental plans were made to fit into the school year.

Constituencies and Strategies Used in the Data Base, and Abbreviations

A	Alumni (ten years through 50 years)	M	Marketing
AC	Alumni Chapters	MG	Major Gifts
AP	Alumni Parents	MS	Miscellaneous
C	Corporations	OA	Old Alumni (after 50 years)
DA	Donor Acknowledgement	P	Parents
F	Friends	S	School Calendar
FN	Foundations	SR	Graduating Class
FR	Files & Records	T	Trustees
G	Grandparents	YA	Young Alumni (first nine years)
IK	Gifts in-kind		

On a separate sheet of paper for each constituent group (trustees, alumni, parents, corporations, etc), we noted what cultivation, solicitation, and acknowledgement activities we planned for each. There was plenty of common ground and overlap, which simplified the task. Solicitation for the Annual Fund used the same direct mail package and phonathon plan for all constituencies. Donor acknowledgement embraced all constituencies as well.

Sample Fall Calendar for Constituent Group Parents

9/5/93 — Phonathon reminder/recruiting memo/contact lists to parents' fund volunteers
9/19/93 — Phonathon recruiting follow-up calls
10/1/93 — Parents' Day
10/1/93 — Phonathon week # 1 (Tue, Wed, Thu)
10/7/93 — Phonathon week # 2 (Tue, Wed, Thu)
12/5/93 — Phonathon pledge reminders out to those who have not honored pledges
1/9/94 — Appeal draft to parent volunteers (return by 1/23/95). Include status report
1/30/94 — Appeal letter out
5/14/94 — Parent volunteers thank-you gifts and recruiting letter for next year out

The next step was to transfer the calendar onto a simple data base on our office computer system. The data base consisted of three fields, which have not changed over the four years we used the system:

Date - The week during which a task was to be done (unless the deadline was a specific date we used the Monday of each week)

Category - An alphabetical code identifying the constituent group or other function *(see box)*

Notes - A brief description of what was to be done during that week or on that day

We reviewed the results to ensure that we had indeed spread the work out in a manageable fashion; we corrected over-scheduling. Doing this in a data base certainly made the effort easy, but computerization is not necessary to create such a calendar; we could have managed with the original paper notes.

The next step was to review the plan for each constituency to make sure that each phase of the Development Cycle had been addressed. We printed each category from the data base separately and reviewed each for completeness. This review also provided time for creativity, as we could now see the work flow, or a particular idea, and make changes as we chose. This creative aspect was validated throughout the four years of using the planning calendar, as we made both subtle and significant shifts in the way we cultivate, solicit, or acknowledge our donors. For instance, when we suspected that preceding our fall phonathon with a mailer was not cost-effective, we were comfortable in adjusting those activities for the following year because we could first see how to do it on paper, and we knew we could manage the scheduling change.

For a very small investment of planning time — about 15 hours the first year, spread over two weeks; half that time the second year — we had created an integrated plan that would see us through the 1990-91 year. All we had to do was meet each Monday morning to a) review those tasks still pending from the previous week, b) plan scheduled activities for this week, c) take a look ahead at what we should start on for next week, and d) insert any unexpected activities. We discussed who would be responsible for what segments of each task, whether we should reschedule something, and even whether we needed to hire temporary help. We could suddenly see the work, and we knew that we could get it done.

Sample Timeline for Activities, from 1990-91 Calendar

8/29/90 - C - Fall appeal out
8/29/90 - F - Fall appeal out
8/29/90 - M - Linsly Today # 1 to mail house (to arrive in homes as school starts)
8/30/90 - S - Orientation
8/31/90 - S - First day of classes
9/5/90 - A - Logistical preparation for phonathon (call phone company, set up room, etc.)
9/5/90 - P - Phonathon reminder memo and contact lists to parent volunteers
9/5/90 - S - Labor Day holiday

We found that we had transformed our first crisis-filled year through the simple miracle of spreading the work out. This feat accomplished two critical goals. We were no longer working day-to-day; we planned our year a week at a time.

More important, we designed time with ways to focus on people who had something in common. Our favorite example was the alumni association. Young alumni just don't have that much in common with older alumni; we discovered this at our first Alumni Reunion Weekend. The solution was simple — design a separate, special activity for each alumni age group during the year.

Samples from the 1993-94 Planning Calendar for Alumni

6/26/93 - OA - Recruit chairperson & review calendar proposal (fall phonathon, winter appeal, spring reunion)
7/17/93 - A - Homecoming mailer designed & to printer
9/4/93 - A - Logistical preparation for fall phonathon
9/25/93 - YA - First appeal draft to class agents (return by 10/13/93)
9/30/93 - A - Homecoming (award Headmaster's Cups, salute Class Agents)
10/3/93 -A - Week # 1 phonathon (OA, '40s, '50s)
10/9/93 - A - Week # 2 phonathon ('60s, '70s, '80s)
10/16/93 - YA - Young Alumni Holiday Luncheon invitation designed & to printer
10/16/93 - YA - Follow-up calls to Class Agents (first appeal draft OK to send?)
10/22/93 - A - Week # 3 phonathon ('90s and wrap-up)

We discovered an unexpected bonus when it came to scheduling donor acknowledgement. We could bring our donor recognition events in synch with a cultivation effort or a key solicitation, putting the events either immediately before or right after the solicitation. Putting these activities on our new calendar enabled us to use new techniques in building donor relationships and to experiment from one year to the next.

Samples from 1993-94 Major Gifts and Donor Acknowledgement Calendar

7/15/93 - DA -Send acknowledgement gifts to last year's 1814 Society donors
8/7/93 - MG - Fall appeal draft to president; include $-to-ask proposal)
8/21/93 - MG - First appeal out
11/13/93 - MG - Second appeal draft to president for review (include year-end giving materials)
11/27/93 - MG - Second appeal out
12/4/93 - DA - Holiday greeting cards out
1/8/94 - DA - Headmaster's Circle Party invitations designed & mailed
1/29/94 - MG - Mid-year state-of-the-school report out to major donors & trustees
3/2/94 - DA -Headmaster's Circle Party
4/23/94 - MG - Year-end appeal draft to president for review
5/13/94 - MG - Year-end appeal out to all non-renewed major donors

The planning calendar was a real blessing when it came to marketing management. My responsibilities included regularly scheduled press releases and two periodical publications — the alumni magazine and a parents' newsletter. Publishing a summer magazine edition that included year-end donor listings was an important priority. Making sure that the parents' newsletter was mailed at logical intervals (just before the start of school, at the end of the winter quarter, and right before graduation) would have been a nightmare without the planning calendar. The solution was the merger of publishing deadlines into the master calendar data base. We could even plan for those unexpected delays at the print shop.

Spring 1994 Marketing Plans

3/19/94 - M - Begin Parents' Newsletter # 3
4/16/94 - M - Parents' Newsletter # 3 start layout
4/23/94 - M - Parents' Newsletter # 3 approved & to printer
5/7/94 - M - Parents' Newsletter # 3 to mail house (to arrive in homes before exams)
5/14/94 - Begin *Linsly Today* summer issue; story assignments
5/21/94 - M - Graduation story to news media; arrange for news photographer at graduation
5/28/94 - M - Prepare year-end press releases (incl. hometown graduation releases for boarders)
6/30/94 - M - Close fiscal year books; prepare donor listings for *Linsly Today*

The simple ability to make changes in what we did, and how and when we did it, gave us an emotional freedom we had not expected. We made a special a point to schedule a day each April to plan the next year's annual calendar. Changes in activities, priorities, and programs became easy to manage. Once the capital campaign was over, we simply deleted its activities from our calendar data base, replaced that time with the activities of a new major gifts program, and kept right on with our work. We even planned when I could make appointments with major donors to cultivate them individually for the new program.

Four years later, as I left Linsly to pursue other goals, I was secure in knowing that my successor was walking into a smooth operation, with skilled staff support, a roomful of records, and his first year mapped out in advance. The flexibility of the calendar data base gave him room to contribute his own ideas. He had a guide to either follow or change. He had the same annual history of activities we built on from year to year, and the same time built into his schedule that we used so well to analyze, to adjust, to grow, and to be human within the workplace. ■

After five years as Director of Development, Alumni Relations, and Marketing for The Linsly School, R. Daniel Shephard has founded Temporary Developments in Wheeling, WV, a freelance fund raising service providing temporary, short-term development support to not-for-profit organizations.

Book Review

Reviewed by Joan Flanagan

Guide to the Fabulous Family Pledge System

by Mary J. Harrington
The Harmony Ark Education Foundation
P.O. Box 1017
Occidental, CA 95465
$15

Imagine that your state has just cut funding for your child's school to the bone. You convene a meeting of parents who say:

I don't want to do anything but write a check.

I don't want to do any events.

I don't want my kids to sell anything.

I don't want any money to go to premiums — put it all into the school.

I don't want to divide people by how much they give. Every gift matters and $10 from one family might represent a lot "more" than $1,000 from another. No listing of names and amounts.

Based on this kind of information, Mary Harrington and Nan Hall conceived a very simple system where parents, grandparents, godparents and others who care about the school children pledge $30 a month for ten months to pay for art, sports, library and other special equipment. Working in a rural community of 5,000, their educational foundation raised $125,000 in two years for two small schools educating 630 children.

Now Mary Harrington, a veteran volunteer, fundraiser and mother of two, shares how they developed the plan, sold the idea to the community, designed a very simple pledge system, and made it all fun. The Family Pledge System is built on the fundraising principle that:

"The easiest way to get money is to ask for it, and the best people to ask are the ones who directly benefit and care the most."

The book includes 30 samples of pledge forms, letters, invitations, reports and thank-you letters. Best of all, it is written in a friendly parent-to-parent tone that makes the whole system seem easy to do, worthwhile, and centered on what really matters: the children's education. While recognizing the human foibles inevitable in any group process, Harrington also fearlessly adheres to the ideal of including everybody.

Unlike traditional fundraising systems that instruct you to find a lawyer, banker and CEO of the largest company in town to be your board, the Fabulous Family Pledge System began with ten parents recruited for two attributes, "We don't care what your professional credentials may be; if you're on this board, you need to have a super positive attitude about parents and fundraising, and work really, really hard."

If you want to raise money without labor-intensive special events or sales, get this book. You're in for a reading treat, an inspiring success story, and all the tools you need to help your own schools get the funds they deserve. ■

Joan Flanagan is the author of *The Updated and Revised Grass Roots Fundraising Book* and *Successful Fundraising, A Complete Handbook for Volunteers and Professionals.*

Announcement

Lesbian, Gay and Bisexual Funders Directory Available

The Working Group on Funding Lesbian and Gay Issues announces the publication of *Funders of Lesbian, Gay and Bisexual Programs: A Directory for Grantseekers*. The first of its kind, this directory is intended to provide information on potential funders for organizations and projects working with lesbian, gay and bisexual communities.

Although the directory lists more than 100 foundations and corporations across the county that have supported lesbian or gay programs, the actual amount of support remains well below one percent of the total philanthropic dollars spent each year. "We are pleased to see other grantors are taking an interest an funding lesbian, gay and bisexual projects," states Mary Ann Snyder, Executive Director of the Chicago Resource Center and Co-Chair of the Working Group, "however, we remain one of only two private foundations in the country with program areas dedicated to lesbian and gay issues."

All of the organizations listed in the directory have provided financial support to lesbian, gay and/or bisexual programs. However, the extent of support varies greatly, from exclusive funding of lesbian and gay projects to awarding a single grant to a gay or lesbian organization. The majority of grantmakers included fund programs only in their local geographic area; but more than 25% of the entries also fund programs throughout the country.

The Working Group on Funding Lesbian and Gay Issues was formed in 1982 in response to the lack of visibility and funding for these issues in the philanthropic community. It is a volunteer organization comprised of individual donors and grantmakers from private, public, community and corporate foundations. The mission of the Working Group is to increase the philanthropic community's knowledge and understanding of critical funding needs in the lesbian, gay and bisexual communities, and to educate communities and organizations serving gay men and lesbians about philanthropy and how to access philanthropic resources.

The *Directory* is available for $10.00. To order the *Directory* or for further information on the Working Group, contact The Working Group on Funding Lesbian and Gay Issues, 666 Broadway, Suite 520, New York, NY 10012. Tel. 212/475-2930; fax 212/982-3321. ■

Available Back Issues of the Grassroots

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Number 1 (February 1987): Strategic Planning for Voluntary Non-Profits; A Personal story: Raising Money for a Trip to the Soviet Union; Twenty Words That Sell.

Number 2 (April 1987): The Art and Science of Direct Mail Copywriting, Part One; "Spelling for Dollars"; How to Hold a Better Meeting.

Number 3 (June 1987): Direct Mail Copywriting, Part Two; The Celebrity Auction.

Number 4 (August 1987): Philanthropy in 1986; The State of the Journal; The Meaning of Self-Sufficiency; Federal Policy and Nonprofit Postal Rates.

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Number 6 (December 1987): Penetrating the Mystique of Philanthropy; How to Hire an Executive Director; How to Do a Raffle.

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Number 6 (December 1988): Looking Good: Speaking the Language, Part II; Fundraising in the Late 80s; Every Penny Counts.

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Number 5 (October 1989): Stop Looking for Wealth; Fundraising in a Small Town; Finding Foundation Funding

Number 6 (December 1989); When Board Members Wriggle Out of Fundraising; Alternative Fund Movement Challenges United Way; Trading Mailing Lists.

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Fundraising Journal Volumes One thru Five Are Out of Print

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Number 6 (December 1990): Raising Money for a Consortium; Direct Mail Fundraising, Part 2; Advisory Boards: No Miracle Solution; Philanthropy in 1989.

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Number 6 (December, 1991): Introducing Your Planned Giving Program; 10 Action Steps for Board Members; From Rags to Riches in Only Three Years; Pancakes for Profit.

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