Volume 14
Number 5
October 1995
$4.20

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If you want unpublished articles returned, please provide a self-addressed envelope with adequate postage.

Subscription Inquiries

Grassroots Fundraising Journal
P.O. Box 11607, Berkeley, CA 94712
TEL: (510) 704-8714 • FAX: (510) 649-7913
On-line address: Chardn@AOL.com

Advertising Rates

Classified:
$.75/word, minimum 10 words

Display:
(width precedes depth)

1/8 page, 3½" x 2¼"	$75
1/4 page, 3⅜" x 4½"	$150
1/2 page, 3⅜" x 9"	$250
1/2 page, 7¼" x 5"	$250
Full page, 7½" x 9¾"	$400

Deadlines:

February issue: December 1
April issue: February 1
June issue: April 1
August issue: June 1
October issue: August 1
December issue: October 1

Camera ready copy only. Full payment must accompany ad, unless other arrangements are made in advance.

In This Issue

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

Founding Publishers
Kim Klein and Lisa Honig

Publisher and Editor
Kim Klein

Associate Publisher
Stephanie Roth

Editor in Chief
Nancy Adess

Design
Robert Cooney

Printed on recycled paper with soy ink.

Starting an Endowment: Part Two

Preparing for an Endowment Campaign

by Kim Klein

In the last issue, we explained the preliminary tasks in deciding whether to create an endowment. This article will assume you have made the decision both to create an endowment and to start it with a campaign. (After the campaign, the endowment remains an open account, able to receive any and all gifts any time.)

An endowment campaign has the same structure as an annual fund campaign, a major donor campaign, or a capital campaign in that it has a financial goal with a gift range chart and a time line in which to meet that goal. It includes forming a committee of solicitors, compiling a list of prospects and creating materials that describe the campaign and its benefits. Once all of this is done, the prospects are prioritized and solicitation begins. Also, like a capital campaign, many organizations conduct a feasibility study to determine what the goal of the campaign should be or even whether to commit to the campaign at all. (We will discuss feasibility studies in the last article of this series on endowments.)

For all the similarities of the steps, in each of them there are subtle and not so subtle differences between endowment campaigns and other kinds of campaigns.

Step One: Setting a Goal

To determine a goal for your endowment campaign, you need to decide how much interest income you want and what amount of principal will generate that. A financial adviser will be able to help you with projections, which must also include whether you are investing only for income or for growth as well and whether you want your endowment principal to keep pace with inflation, which will mean reinvesting some income back into the principal or investing at least some principal in growth stocks. As an example, to generate $50,000 a year will require a endowment of around $1,000,000.

Sometimes groups just want "something to take the edge off" — the stiff drink approach to endowments. They want a pot of money that generates $5,000-$10,000 a year and so they only need $100,000-$250,000. An endowment is not the vehicle to raise this small amount of money. An organization could either decide to increase their annual fundraising by the $5,000 or $10,000 it is seeking, or to start a savings account or a reserve account that would eventually yield that sum annually. Generally, it is not worth the effort of starting an actual endowment to raise less than $500,000.

Of course, however much money you decide to raise in your campaign, you should always be seeking and accepting additional endowment gifts. But keep your endowment moving by setting a large enough goal to be meaningful. While having $250,000 or so raised will help donors feel more assured that their money is joining existing money, too often the reality is that a campaign stops at this small amount. It is too much money for the organization to spend, but not enough to generate the kind of interest that will really help with the annual fundraising crunch. If you decide to seed an endowment with a campaign, be sure that you have a plan in place for having the endowment grow after the campaign is over.

Once you have a goal, you need to create a gift range chart (see the article, "Getting Major Gifts: The Basics" in the Journal's reprint, *Getting Major Gifts*, for a fuller discussion on creating a gift range chart). A chart for $1,000,000 is shown below. The chart calls for one gift to equal 10% of the goal, 2 gifts to equal 5% each of the goal, and 3-5 gifts equaling the next 10% of the goal. Six to eight donors make up 30% or more of the total goal. Generally, gifts of less than $1,000 are not sought (although all gifts are gratefully accepted). Because donors have several years to pay off these gifts, $1,000 is affordable for even lower-income people. Organizations with a donor base of very low income people, however, need to think twice before launching an endowment. Even if such an effort could be successful, it means the organization will have a kind of financial security that few, if any, of its supporters have. This can exacerbate a danger present in all endow-

Goal: $1,000,000

Gift Size:	# of gifts:
$100,000	1
50,000	2
25,000	5
15,000	10
10,000	20
5,000	25
2,500	50
1,000	75
Total Gifts	**188**

ments: a perception on the part of donors that the organization doesn't need annual gifts.

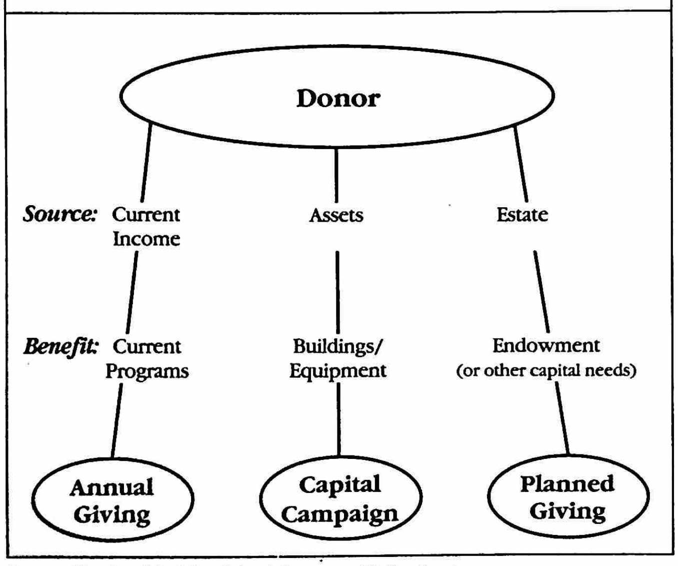
Step Two: Creating the Time Line

The time line for an endowment campaign is not less than two years and not more than five years. The time line for the campaign does not include all the discussion involved in deciding to do a campaign or the feasibility study, but it does include the preparation time in terms of prospect research and materials. It usually takes the best part of a year just to solicit the lead gifts (because many of the lead donors will have to be talked with several times), and to create appropriate materials, and another year to solicit all the other gifts. Three years allows for the unforeseen to be dealt with and the maximum number of donors to be solicited. Five years is the outside maximum amount of time an organization can sustain interest and passion for a campaign. Depending on the goal, three years is often the ideal amount of time to conduct a campaign. A fourth year can be used as "wind-down" and pledges can be paid over five or more years even if the campaign is finished in two years.

Step Three: Forming a Solicitation Team

Before discussing the actual team, let's review what it is we are asking for when we ask donors to consider an endowment gift. An organization has three financial needs: most pressing and constant are its *annual* funding needs. Occasionally, a group needs new computers, a new building, renovation of an old building, a satellite office, and so on. For these it needs *capital* funds. Groups that want to be around for the next 50 or 100 years need an *endowment* fund.

TRIPOD OF DEVELOPMENT



Source: The Fund Raising School Center on Philanthropy

Donors can help an organization with three kinds of gifts: gifts from their own annual *income*, gifts of *assets* such as stock, bonds, real estate, art and so on, and gifts of all or part of their *estate*.

Traditionally, endowments are funded by gifts from estates. This is why traditional endowments cannot be conducted as campaigns, because the receipt of the gift usually depends on the death of the donor as well as the time it takes to settle the estate (which can be years). Some groups have counted the unrealized value of bequests as part of their endowment campaign goal, but this is both foolish and unethical. Bequests can be changed up until a few minutes before the donor's death, so they are not irrevocable. Only irrevocable planned gifts (such as trusts) can be counted toward a goal.

In conducting an endowment campaign, on the other hand, organizations are asking donors for *assets*, which can be given either as part of estate planning, or as a gift during the donor's lifetime. Although gifts made from a donor's annual income are certainly welcome, they will never be as large as assets or estate gifts, because even the wealthiest donors reserve the bulk of their income for their own needs.

In forming a committee, then, you are looking for people who are comfortable asking donors for assets; usually these are people who have made a significant asset gift themselves. The people on the solicitation team include members of the board and people who have made large gifts to the endowment. While this is the ideal scenario for any campaign, for an endowment it is much more important that those who are asking have given to the campaign themselves.

To form the solicitation team, first identify the people closest to the group who can make the largest gifts. A team consisting of a board member and a staff member ask each of the solicitors for their own gift, then to be on the team. Some members of the solicitation team are usually identified during the discussion about whether to have an endowment. They are the ones who argue in favor of it and say that they will give to such a campaign. The team does not have to include those making gifts at the top of the chart (although this is ideal), but must include people who are giving assets themselves. People asking for these kind of gifts have to have some sense of what it is like to give a gift that you can only give a few times in a lifetime, and for many people, only once.

Conventional financial planning dictates that one should "never touch principal." Yet principal is what you are asking for. In a sense, you are asking people to transfer some of their "endowment" to your endowment. This is a process that requires thought, commitment and careful consideration. All the solicitors must be people that the donors trust to have gone through this process. Plus, there is something very convincing when a person can say, "My husband and I have accumulated a nest egg of $100,000 over many years of saving. It is for our retirement and for emergencies. But the threat to reproductive rights/environment/our children/world peace is bigger than our need for a nest egg. We want to make sure that Important Group is able to do their work and not have to struggle so with fundraising. So we are giving $25,000 to the endowment as our investment in our communities' future."

The solicitation team can be formed slowly. It can start with two or three endowment donors and as more donations are received, those donors can be asked to join the team.

Step Four: Compiling the List of Prospects

In all campaigns, the rule of "top down, inside out" is the way to organize your prospects. Ben Franklin, who was one of America's earliest and best fundraisers, advised, "Apply to all those whom you know will give something; next to those whom you are uncertain whether they will give anything or not, and show them the list of those who have given; and lastly, do not neglect those who you are sure will give nothing, for in some of them you will be mistaken."

Franklin's advice is what we mean by "inside out." Start with the people closest to the group. Those will be board members (if they are not the closest to the group, then reconsider doing an endowment campaign), other major donors, volunteers, former board and volunteers (assuming no ill will accompanied their becoming "former"), staff, and so on. Then, from that list start from the top and work your way down.

How do you decide who is at the top? Judith Nichols, in her book, *Pinpointing Affluence: Increasing Your Share of Major Donor Dollars,* suggests a rating system to create the "top down" list from your "inside out" prospects. She suggests setting up a point system that gives prospects points in three gift categories: recency, frequency and size. For example, for recency:

+ 8 points for a donor who gave in the past six months
+ 4 points for a donor who last gave 6-12 months ago
+ 2 points for a donor who gave 12-24 months ago
+ 1 point for a gift from more than 2 years ago

For frequency, take the number of donations in the past year and multiply by four points, and for value, award one point for every $100, for a maximum of 40 points.

This system, or some modification of it, allows you to spot donors for whom size of gift may not be the main variable. For example a person giving $50 four times a year would have 26 points (8 for a gift in the past six months plus 16 for frequency plus 2 for size). A person giving $500 once in the past six months would have 17 points (8 for the past six months, 4 for frequency and 5 for size). A person giving $1,000 in the past year but nothing in the past six months would have 18 points (4 for recency, 4 for frequency and 10 for size).

Now, you have a list of donors top down, inside out, based on the formula. Fundraising is formulaic in many ways, but also requires the application of common sense. Now look at your list and see what else you know about these people. For example, your person giving $50 every quarter gets the highest number of points. If her $50 gifts are derived from income off investments, then she definitely stays at the top of the list because maybe she would just give you the asset that is yielding this $50 a quarter. The $1,000 person is next; however, you happen to know that he won that in the lottery and he actually ekes out a living as an artist and his highest gift before that was $10. He may be an excellent solicitor because he actually gave an asset that he could have used himself. However, it is unlikely that he will make a bigger gift to the endowment. The $500 person is a former board member who lives comfortably and gives $500-$1,000 to several organizations. He writes user-friendly computer manuals and travels a lot. It will be important to find out whether he ever gets paid in stock from the company he works for, as his assets could be high. You also know he recently joined a "voluntary simplicity" group which explores ways to live more simply and lightly on the earth. He may be thinking of liquidating some of his assets as part of that lifestyle.

Many people will say that they have no idea what assets their donors have. If you really have *no idea*, then you are going to have to find out more about your donors before you go asking them for gifts to your endowment. However, a general easy rule to follow in soliciting capital or endowment gifts is to ask for a gift that is ten times the donor's annual gift amount. You want to make it clear that this gift is in addition to their annual gift. You don't want your annual income to decline while you are doing this campaign. When you tell donors that you are asking everyone for the same thing — ten times their annual gift — people are not offended, even if the size of the gift is absolutely out of their range. The real risk you take in following this formula without other knowledge is that you would ask someone for too little.

The final step in compiling a prospect list is to be sure you have enough prospects. A prospect for an endowment gift is someone who has demonstrated a commitment to your group, usually by giving over several years and often through other than just financial involvement, someone who has the money, and someone whom you know or you have access to.

You need four times as many prospects as the number of gifts you seek because 50% of your prospects will say no and 50% of the group that says yes will give you less than what you ask for. In our $1,000,000 gift range chart shown above, we would need 752 prospects (188 x 4) to be certain that we could complete this goal. You don't need all the prospects right at the start, but you do need the prospects for the biggest gifts right from the beginning and you would be ill advised to launch a million-dollar endowment with fewer than 200 prospects for gifts of $2,500 or more — or 30% of the money committed.

As you can see, an endowment campaign is a serious proposition, beyond the scope of smaller grassroots organizations. Future articles will explore alternatives to an endowment. ■

Next: Materials and the solicitation process itself.

Major Donor Cultivation: *Steps to Success*

by R. Daniel Shephard

Recent reports from professional colleagues suggest that as little as 15% of the donor base is providing the majority of contributed income to America's charities. In other words, an ever-shrinking number of very generous supporters are the life's blood of many charities.

This leads to an incontrovertible conclusion: the care and feeding of major donors is more important than ever. And, at a time when charitable giving is increasingly under attack from government agencies, including the IRS, grant-makers, and even lawmakers, the risk for fund raising professionals to become distracted from priorities only exacerbates the situation. Increased requirements for detailed record-keeping, attention to personnel issues, grantsmanship and special events, and the pull of so many extracurricular demands on the professional's time makes it a wonder that much significant fund raising takes place at all.

So much attention to so many details practically invites the professional to take the individual needs and expectations of current major donors for granted — to assume that their past gifts speak for their future commitment. This is a dangerous rationalization of what is important among the professional's priorities. Remember that *the most likely gift is usually the renewed gift.*

How well do you really know your most important donors and what moves them to give? What are their broader professional and personal priorities? How much of their charity is truly altruistic? How much of their giving is driven by the tax-deduction incentive? How many other charities do they support? What does each of those charities do to deepen its own relationship with your major donors? How much do you really understand of the competition for your key supporters' attention and generosity?

Designing a Major Donor Cultivation Program

As individual as the relationship must be with your organization's most important donors, that relationship can still be built structurally, in accordance with a carefully designed cultivation plan. Here's one way of designing such a plan.

First, determine who is considered a major donor to your charity. Consider annual gift amount, lifetime gift amount, special gifts, and even influence with other prospective donors. Come up with a head count of those individuals and organizations most critical to your organization. Include corporate and foundation donors. And certainly assume that every member of your governing board must be on this list, regardless of gift amount. If they aren't currently giving appropriately, this cultivation program may be your best bet to convert them, too.

Design a plan to contact each major donor regularly throughout each year.

Design a system of gathering important information on each donor. This might include such basic information as birthdays (including those of family members), a list of their other charitable priorities, each donor's favorite aspects of your programs and services, etc. If you can afford the time and expense, add such data as can be obtained through professional financial profile data searches.

Your office information system can consist of a single drawer in a filing cabinet, with a folder for each identified major donor. Build your donor information files as you build your major donor cultivation system.

The next step is to list opportunities for cultivation of your key donors. Examine your organization's current donor acknowledgment program. Are key contributors invited to visit and celebrate with your organization at least once each year? Are they recognized in print? Do you send them appropriate gifts or premiums in gratitude for their support (and do they appreciate this spending of the very money they gave you)?

Now comes the most important part. Design a plan to contact each major donor regularly throughout each year. Make it a priority to meet or speak with each donor individually. Offer to meet for lunch. Invite the donor to visit and see new developments at your organization. Ask a donor to join you at some activity sponsored by your organization. Host a trip to the theater or a ball game, or go out to dinner together.

Make the meeting one of acknowledgment and education. It will amaze you how your donors will respond when you call them and make it a point not to ask for money for a change.

Review this list with your chief executive officer, make sure that he or she is plugged into your new cultivation plan and invite him or her to accept responsibility for contacting some of the names on the list. This endorsement by participation is a crucial step that should not be overlooked.

If you have a computer data base, it is a simple matter to enter the names and divide them into manageable increments for contact. Just determine how much time you have for major donor meetings each week/month/quarter. Then assign that number of donors to be seen. The fields in such a data base might be as simple as this:

Donor's name
Donor's address
Donor's phone
Date of last contact
Date of next contact
Assigned volunteer
Notes

Giving history can be cross-referenced with your existing records.

If a data base is unavailable, make a file card for each major donor and keep them all in a file box to be reviewed each week. All you have to do in order to manage this system is to make sure the first thing you do each Monday morning is look at your major donor contact files; it should take about five minutes to see what is scheduled and to make an action plan for the week.

Each time you make personal contact with a major donor, make appropriate notes for their file, then plan when your next contact should take place. Either enter this date in your data base, or put the file card in the correct chronological slot in its box. If your goal is to see each major donor twice a year, simply note that your next contact should be six months from today's meeting or phone conversation.

Should you see that donor again before the next scheduled contact, give yourself permission to reschedule the following planned contact. The system is yours; it's OK to make adjustments.

Each personal meeting with a major donor carries with it the potential for cultivation and acknowledgment. You will be amazed by the things you learn about these people. They are almost invariably the most motivated, talented, and personable members of your community. They are successful professionally, socially, and philanthropically. Learn about their activities and accomplishments. Ask permission to publish what you learn, either in your own magazine or newsletter, or in the local newspaper. This cultivates your relationship with the donor and buys your organization great public recognition.

Each time you meet with a major donor ask yourself if the time is right to discuss a gift. If you have no significant program priority on which to base a request, maybe the time is not right. Examine the date of the donor's last gift and use that as a guide. You can even plan your periodic contact to coincide with the date of the donor's last annual gift, and use the meeting either to request renewal or to say thanks for a recent renewal. And don't forget to bring up the topic of estate planning at the right time.

The most likely gift is usually the renewed gift.

But when is the right time? A few botched interviews can be the kiss of death for the fund raising professional who misjudges the people most influential to his or her organization. Offend one or two key donors and it's time to update your resume. On the other hand, spend some valuable time getting to know them individually and you tend to gain credibility as well as job security. You will learn to judge the right time.

This periodic contact program becomes the perfect ice breaker for the development director new to the job. The reason for the first series of contacts can be to simply introduce yourself and to ask advice from your major donors. People love to give advice and they will appreciate your gesture.

Schedule time on your calendar to conduct a quick review of your contact system after special events to which major donors are invited. You may choose to reschedule contact with those who attended, and to re-prioritize contact with those who did not.

Make it a point to contact those donors who live out of town. If your budget permits, offer to go see them at least annually. Even those who decline your offer to meet will appreciate the gesture. Keep them informed of what you are doing as the result of their generosity. Birthday and holiday greeting cards are an inexpensive alternative to meetings. A periodic letter reporting on happenings at your organization — a personalized semi-annual or quarterly report — can be both effective and affordable.

Here is one special program that can be both meaningful to your donors and cost-effective for your development budget. Learn your major donors' hobbies or interests. Then design a Books Program to honor their special relationship with your organization. To acknowledge each donor's major gift, buy an appropriately priced book that you know will have special meaning to the donor. Either place it in a library in the donor's honor, or give it to the donor as an indication of gratitude. This is an annual acknowledgement program that

Each time you meet with a major donor ask yourself if the time is right to discuss a gift.

will never get stale and that carries far more meaning than giving your donor another plaque or mantle clock.

You may find group activities appealing, and the chemistry created by several people who share an interest in your organization can be beneficial. Consider inviting a group to some social activity or on a trip (theater, golf, a cruise), either as a cultivation effort or as a part of your formal donor benefits program (the activity can be geared to different gift levels).

Expand with Volunteers

At some point the number of donors to contact will outgrow your own time availability. That is your cue to add a cadre of dependable volunteers to the plan. Recruit several key individuals who are willing to help you make major donor contacts. Start with members of your board, especially the development committee. Draft a one-page list of duties and expectations — a job description — for volunteers in your major donor cultivation program. Explain in detail what is expected when contacts are made. Allow each volunteer to choose whether he or she wants to participate in solicitation efforts or to draw the line at cultivation and education; either can be valuable to you. And don't be disappointed if only two or three accept the job. You will have doubled or tripled your contact capability, you will have recruited committed individuals whom you will be able to manage effectively, and your success with them will eventually encourage others to volunteer.

You can ease into this expansion via a regular schedule as well. At each meeting of your development committee, or of the full board, present the names of several major donors who are due cultivation contact. Invite those present to volunteer to make this personal contact. Have each volunteer identify those major donors to be added to his or her personal contact list, and add this new information to your contact data base or file cards. This will enable you to maintain control of who is being contacted, when, by whom, and for what purpose. Manage your volunteers with the same system you use for your major donors.

You can make even this simple effort non-threatening to those who volunteer. Take advantage of the dynamics of group gatherings. Schedule a periodic (quarterly or semi-annual) open house to which your volunteers can invite their chosen prospects. This event can take place at your organization's work site or in the home of a volunteer host.

Should your volunteer leadership not be immediately ready to participate in even this activity, and if your own schedule is prohibitive, you can start simply by having volunteers make an annual written or telephone contact with each current major donor. Conduct a thank-you phonathon or note-writing party, using appropriate volunteers to express their gratitude to those whose generosity makes your work possible. A school can use students; human service organizations might recruit clients; performers can be asked to help their arts organizations. The reason for this annual contact is simply to say thank you to your most important donors, and to invite them to express their questions or concerns. Volunteers turn their notes over to you and you follow up as appropriate. And that means more meaningful contact with your major donors.

Expanding Your List of Donors

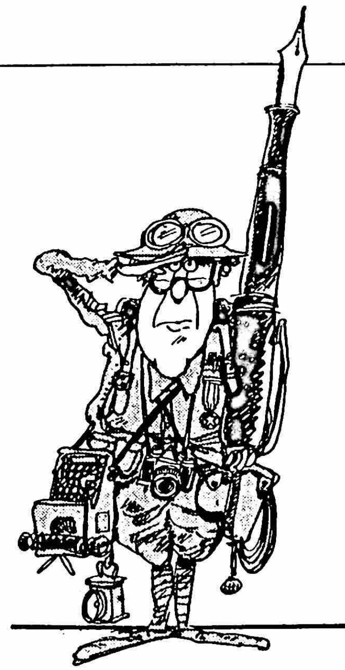
Eventually two things should begin to happen. As you become more efficient at recruiting volunteers and managing your cultivation and contact calendar, you will find time to add a second tier of donors to your list. The goal for this expansion is to invite new major donors through expanded personal contact. Any or all of the above techniques may be used to expand your list of major donors by encouraging smaller donors to increase their generosity and to enjoy the enhanced personal contact and intimate awareness of your people and programs.

The other thing you should expect and plan for is that contributed income will increase. Anticipate this, and be ready to make your case for adding additional resources to your major gifts program. That may mean enhanced computer tracking capabilities or additional staff to support your successful development program. Believe that this will happen and use your belief to motivate your initial efforts.

But start! As is true of any development program or campaign, it isn't necessary to do it all at once. Choose those elements that make sense to you and alter them to suit your own situation. Grow at a rate that will work for your organization.

If your initial analysis identifies twelve members of your board and only six other individual or institutional major donors who should be on your start-up contact list, then consider this to your advantage. Assuming that your start-up goal is to contact each major donor on your list only once during the first year, then believe that you can manage to contact an average of three people each month and maintain all your other responsibilities. Nothing else you do will have as positive an impact on your development program. ■

This article first appeared in slightly different form in the summer issue of NSFRE's Advancing Philanthropy *magazine. The author invites* Journal *readers to share their own ideas and experiences regarding major donor cultivation. Information will be used for further articles, and available to those who request it. Send to R. Daniel Shephard, Temporary Developments, P.O. Box 4134, Wheeling, WV 26003.*



Creating a Comprehensive Media Campaign

by David Bolling

The following article is excerpted, with permission, from How to Save A River, A Handbook for Citizen Action, *published by Island Press ($14). To order, contact River Network at (800) 423-6747. Though it is directed to river-protection groups, its teachings are applicable to all grassroots nonprofits.*

In the annals of river conservation literature, its hard to find examples of well-executed, comprehensive media campaigns. That's not to say that numerous river crusades haven't generated lots of coverage, but there's more to a media campaign than headlines and sound bites and more often than not media management isn't given the attention it deserves.

But wait, you may well be saying to yourself, I know how to write a press release, I've assembled a media information kit, and I've put together a list of media contacts. What else is there to do? That "what else" is what we're going to talk about here, and it applies equally to existing organizations and the new one you've just created.

If, like most river groups, yours doesn't have the money, the time, the personnel, or the interest to mount a full-blown media campaign, you may have to pick and choose selectively from the possibilities outlined here, but remember that no one will know about your river if you don't market your message.

The operative word here is "market." Some people hate the "M" word, they find it distasteful to reduce their lofty ideals to marketing jargon. But like it or not, what you are about to do is market your river, to sell it, like a product.

The first step in selling anything is defining the product. Sounds simple, you say, my product is a river. But the definition has to be more precise than that. The people who protected the Tathenshini sold it as "North America's Wildest River." The marketing message for the John Day River could be reduced to one word: salmon. On the Gauley and the Ocoee the product bought by the public was whitewater recreation. Your river may have several products worth marketing, but you should choose the one or ones you think have the greatest sales potential.

You also have organizational products to sell and you need to identify them as well. Those products could include river trips, slide shows, river literature, special events, T-shirts, technical expertise, and an ethical, conservation vision. And you have one exclusive product the public won't find anywhere else: the feel-good experience of protecting a river. In short, when you sell your message to the media, be sure you know what you're selling.

Know Who You're Selling To

The next step in marketing is identifying a target audience. Most advertisers focus their message on that demographic slice of the public most likely to buy their product. So should you. You'll get more mileage from your message if you tailor it to the people you know you need to reach.

You've already identified the natural constituencies for your river, so the message you shape should be designed to appeal to them. If, for instance, a key product of your campaign is river recreation, make sure the media message you develop targets a recreational constituency.

Wealthy organizations target their audiences with the help of surveys and focus groups. Since even a modest-sized survey could set you back $5000 and a professionally arranged focus group isn't much cheaper, you'll probably have to use other tools to find out what your target audience thinks about your river. But that's not as hard as it may sound and there are several simple ways to collect public opinion, including town meetings.

As Don Elder explains, the Cahaba River Society holds town meetings up and down the length of the river's watershed. The meetings are designed to build a basin-wide constituency and to find out what local citizens are concerned about. It's an easy, inexpensive process to organize and could be invaluable for targeting your campaign.

A questionnaire is another good tool for gathering opinion. Ask respondents to explain what their greatest concerns are about the river, what action they want to see taken, who they think should take it, and whether they are willing to get involved in the campaign. The questionnaire can be circulated at town meetings, distributed in your newsletter, in the newsletters of allied organizations, and by direct mail.

Another effective way to poll the public and build a constituency is the door-to-door canvass. Canvassing is slow and labor-intensive but it's a great way to get accurate and in-depth feedback on your river campaign. It's also a good way to put volunteers to work. If you can't find the volunteer labor, look into partnering with an existing canvass — they gather information for you and raise money for themselves. The League of Conversation Voters does extensive canvasses in many parts of the country and frequently seeks local issues to work on.

Some groups prefer to conduct phone canvasses because they're quicker and far more contacts can be made in the course of a day or evening. Friends of the River has established an ongoing in-house telephone bank to activate and poll members, generate letters, and raise money. The main limitation to phone canvassing is rising public resistance to telephone intrusion.

Once you've identified your products and targeted your audience, you need to develop a message. The key to communicating your message through the media is simplicity and snap. The message has to be short and punchy. No buzzwords, no jargon, nothing too complex. Far too many groups ignore this advice and it is worth a major commitment of time and creative energy to develop the words and the images that summarize your message in a way that even the most vacuous newscaster can understand and regurgitate accurately.

Running Your Media Campaign

Once you've done all this, you're ready to launch a media campaign, with as many elements as you have the time, the staff, and the money to develop. Those elements include:

1. The Press Release

Organizations that have their media act together make continuous but judicious use of the press release, which has three basic purposes: To respond to a recent development or to announce a position; to provide context and background information for breaking news; to announce an event and invite the press to cover it.

Press releases should not be used indiscriminately; send them out too often and the media will start to ignore you. On the other hand, don't pass up a legitimate opportunity for media attention and always be prepared to move quickly.

In 1991 a Southern Pacific train derailed in a narrow canyon along the upper Sacramento River. A tank car tumbled into the river and leaked thousands of gallons of a toxic herbicide. Within hours the river was biologically dead and within hours after that every environmental organization in California with any media savvy was issuing a press release. Friends of the River joined the chorus and reaped substantial publicity for its river conservation message.

Timing is everything. You should be prepared with a press release whenever you have an opportunity to make or respond to news.

Writing a press release is a simple skill, often done badly. There are a few hard rules, besides the basic who, what, where, when, why, and (often forgotten) how. The first paragraph (the lead) is all important. It should tell readers the basic facts but tempt them further. Sometimes a question works well: How many steelhead trout are left in the Russian River? No one knows, but the numbers have plummeted since 1970, and that's why Friends of the Russian River is sponsoring a conference at the Junior College September 30 to discuss the fate of the fish.

Never put your opinions in a press release unless they are quotes from the mouth of someone else. Avoid hyperbole, emphasize facts and whenever possible, announce an action. If, for instance, you want to make public your opposition to a dam project, don't just send out a press release. Instead, write a letter to the dam-building agency stating your position and then announce in a press release that you have sent the letter. Even better, schedule a meeting with the agency and alert the press, with a copy of your letter attached.

Press releases should always be double-spaced, preferably on letterhead, with a date of issue and a time of release (usually "immediate"), along with a contact name and phone number. Put a brief headline at the top of the page and repeat a shortened version on top of succeeding pages. Press releases should rarely run more than two pages. Always describe your organization and its purpose clearly and succinctly toward the end of the release.

As important as knowing how to write a press release is knowing where and when to send it. Never send the same release to two different people at the same newspaper or television station. Carefully choose one contact and send one release. It's embarrassing to have two different people at the same newspaper working on the same story.

It's also embarrassing to send a release too late for use and it's a waste of time to send it too soon. Press releases received several weeks before the event are soon forgotten. For daily papers the rule of thumb is three to five days before you want to see it appear in print. For weeklies, which have smaller staffs and longer lead times, allow 10 days to two weeks. And after you've mailed it, always follow up with a phone call, at least to key media.

Press releases for radio and television stations should contain the same information as newspaper releases but in abbreviated form. Broadcast news is, of course, shorter, and except for background material, a broadcast press release should be limited to one page.

Often overlooked by media campaigns is the Daybook provided by the Associated Press. In major cities, AP puts out a complete listing of coming events which television, radio, and print media rely on. Check with the AP in the nearest large city.

2. Media Kits

Media kits are for distribution at press conferences; they're background information to give reporters interviewing you and to hand around at editorial board meetings. If you have the money, it's also good to mail one as a "backgrounder" to everyone on your media list with a cover letter offering yourself and your organization as a resource for future stories.

3. Feature Stories

The heart of your message only emerges when the news media decides to do a story on your river in-depth. That means a feature.

Getting a feature story for a river is seldom difficult, particularly if there's a dramatic threat involved — like a dam, a pollution scare, or a high-profile endangered species. This is the fodder of journalism and the more controversy there is the more the media likes it. Your job is to provide the background, the research, and the authoritative expertise for the story. And you do that by becoming a reliable source and a familiar contact. Keep a running list of ideas for feature stories and feed them to friendly journalists. In smaller towns and for weekly newspapers, you'll find editors willing to take freelance feature articles about your river.

When you're dealing with television and radio, remember that a feature story means three to five minutes of air time, so well-rehearsed sound bites and visual bits are crucial.

4. Editorial Meetings

To some degree, you get the media coverage you ask for and the best place to ask is at the top. That's why background sessions with editors and editorial boards are a fundamental part of any media campaign.

To set up a meeting send a letter and press kit to the editor, news director, or program director you want to meet with, explaining what you want to talk about and why it is important. Follow with a phone call and arrange to bring with you one or two of the most prominent and credible supporters you have. During the meeting resist the temptation to proselytize. Lay out the facts, answer questions, and offer expert analysis and background information for future coverage.

5. Letter to the Editor, Op-Ed Pieces, and Editorial Replies

Letters to the editor are one of the best-read features of any newspaper so you're missing a major audience if you don't make use of this free forum. You should, of course, invite your members and supporters to write letters on behalf of the river. But you should also orchestrate the submission of letters from key people — experts, political leaders, celebrities.

A massive outpouring of letters isn't necessary or effective since most newspapers limit the number of letters on any given subject or from any given writer. It's far better to have a fewer number of well-written letters from prominent people, timed to correspond with key campaign events.

Op-ed pieces provide another effective — and free — forum and they, even more than letters, should be carefully crafted by a prominent spokesperson for your campaign.

Television and radio stations routinely provide opportunities for "free speech" messages or replies to station editorials. If you stay on top of the news you can find opportunities to get on the air. To arrange a reply, contact the station's program director and ask for air time.

6. Talk Shows

The airwaves are awash with talk shows and in most markets they're fairly easy to get on. When shopping for a talk show, listen before you leap, become familiar with the host's interests and style, and structure a letter of request in response to what you hear.

Before going on the air, particularly for the first time, it pays to rehearse, even to role play what you are going to say. Have a friend play the host and practice framing short, succinct answers. It's also helpful to practice responding to hostile questions since you will almost certainly get your share.

7. Press Conferences

Press conferences are thinly veiled theater. You use them to get attention for an important announcement, an upcoming event, a lawsuit, the opening of an office, the opinion of someone important, to release new information. Alert the media with a press release 48 hours in advance and always follow-up with telephone calls. Have press packets and a general release available at the press conference.

Press conferences should have a clear and simple focus, they should start on time and they should be held in the morning, preferably by 10:00 a.m. A press conference that's over at 10:30 will make the news at 6 and 11 o'clock as well as the newspaper the following morning. Notwithstanding the instant transmission of mini cams, television reporters still work primarily off take and aren't likely to cover an event they can't have edited on the air that day.

Whenever possible plan your press conference at the river; it offers the visual impact television crews crave. Hang banners and posters to dramatize your message and turn out a throng of volunteers. Be on hand well before the event starts. It isn't always practical, but if possible have an amplified sound system available so that you can be heard above the noise of a crowd. Some rental units can be run off batteries.

8. Slide Shows

Cheaper than a video and visually more effective, a slide show should be one of your basic media tools. It can range in sophistication from a loose collection of slides you project during a lecture to a fully scripted show with title graphics and a sound track. A slide show shouldn't run longer than about 10 minutes, which allows for more than 100 pictures, and a good one can easily be done in half that time. Its biggest advantage is the size and quality of the image projected. The disadvantage is the need for a projector and viewing surface.

9. Video

Everybody is doing video now and its very ubiquity has become an argument in video's favor. People have come to expect it. Video's biggest single advantage is convenience; it's easy to edit and update and you can carry a whole show in your pocket. It's also cheaper to copy than a slide show, offers moving images and greater graphic flexibility. But video is more expensive to produce, running upwards of $1000 per minute for professional production.

There are some viable alternatives, however, that can make video affordable, even cheap. It's worth seeking out student film making classes or volunteer amateurs interested in developing some credits. Sometimes PBS stations will produce a program which you can adapt for a campaign video.

When you've got a video, flog it. Make it available to schools and libraries and see if you can have it shown on a local public access cable channel.

10. Speakers Bureau

As word spreads about your campaign, invitations will start to arrive from business and civic groups, churches and schools to provide speakers on the subject of your river. Be prepared. Developing a speakers bureau requires identifying the people in your campaign who can make your case effectively in public. A well-run media campaign involves a continual series of public presentations and reaps twin benefits since you're educating your audience and, often, getting media coverage as well.

11. Theater

There are different points of view about political theater and some people are wary of it, worrying that it lacks dignity and mainstream appeal. The knock on theater is that it is sometimes done badly, in poor taste or with little sophistication, and therefore turns people off. The up side of theater is that more often than not it gets immediate media attention. When Earth First! unrolled a giant fabric crack down the face of Glen Canyon Dam there was no seismic shift in public thinking, but a picture of the crack made front pages all over America.

And when Friends of the River transplanted a Toyon pine tree from the Stanislaus River Canyon to the grounds of the state Capital in Sacramento, thereby making the point that all living things in the river corridor were threatened by New Melones Dam, the action got widespread and respectful publicity. If you decide to do some theater, make sure it isn't offensive to the general public and therefore counterproductive.

Not many groups will do theater with real theater, but the Mattole Restoration Council, in collaboration with other environmental groups, and with a National Endowment for the Arts grant, sponsored a musical comedy called Queen Salmon, which has been touring the West Coast to great acclaim since 1991. The "biologically explicit musical comedy for people of several species" chronicles the plight of Pacific salmon with humor and good music.

12. Top 10 Lists

The increasing popularity of this publicity device may or may not have anything to do with David Letterman. American Rivers began a list of the nation's 10 most endangered rivers (along with the 15 most threatened) in 1987, and while the idea took a while to catch on, an aggressive media campaign has resulted in extensive national coverage. The annual announcement is now made at celebrity-festooned press conference and follow-up press conferences are held around the country for each of the endangered rivers.

The New England Coastal Campaign's Terrible Ten list was another media masterpiece, garnering widespread publicity and focusing public attention on threats to the coastline and estuaries of the Northeast.

The Art of Making News

Turning these basic elements into a media campaign requires constant creativity. Here are some suggestions for the fine art of making news.

Conduct a survey and announce the results; issue a report; organize a press tour of the river; announce the formation of an organization; make a prediction; arrange an interview with a public figure; adopt a river; hold a contest; make a speech; announce an appointment to your staff; respond to breaking news; present an award; celebrate an anniversary; prepare and release testimony for a hearing; release a letter you have received; praise a decision; stage a peaceful protest; host a debate; respond to outrageous claims by the other side; open an office.

Finally, when your campaign starts to reach critical mass, you may want to employ the oldest marketing tactic in politics — yard signs. Friends of the Payette put yard signs "all over Southwestern Idaho," says Wendy Wilson. "A legislator once asked why we had them — she saw them everywhere. We said that was why." ■

David Bolling is an award-winning journalist who has written about rivers and river issues for more than 20 years.

Book Review

Boards From Hell

by Susan M. Scribner

1991, 60 pages, $15 plus shipping.
Order from: Scribner & Associates
49 Coronado Avenue
Long Beach, CA 90803
(310) 433-6082

Reviewed by Stephanie Roth

In my work with nonprofit boards of directors, I am always on the lookout for publications I can recommend to my clients. While much has been written about boards, it is hard to find material that is straightforward, practical, and aimed at busy people who can't or won't spend a lot of time reading about theories of nonprofit management.

So I was pleased to come across *Boards From Hell*, which meets all of above criteria quite well.

Using humor, clear and simple language, and specific advice, Scribner describes characteristics of "boards from hell" by identifying problems common to many boards. She then suggests strategies for creating "heavenly boards."

The 60-page book begins with descriptions of 12 variations of problematic boards, such as Phantom Boards (Missing in Action), Microscope Boards (Analysis Paralysis), Parrot Boards (All Squawk, No Action), Bored Boards (Uninvolved, Uninformed). A humorous highlight of this section is a page titled "How to Create a Board from Hell," which lists a total of 14 suggestions, including, "Never explain the job thoroughly to anyone joining your Board," "Don't force Board members to participate in training or orientation," and "Don't bother with committees. Let the whole Board discuss everything to death."

Moving on to a description of a heavenly board, Scribner gives clear, concise explanations of the role of a nonprofit board, as well as the specific responsibilities of board members. She recommends the kinds of committees that are useful for carrying out the work of the board, and the tasks each committee is responsible for. Also included is a thorough description of the role of the board chair and other officers of the board, and a sample job description of the executive director position. A very useful step-by-step guide to conducting a strategic planning process completes the book.

I share Scribner's beliefs that in order to develop a healthy, well-functioning board, it is essential to have clearly defined roles and expectations, committed members, functioning committees, and adequate attention paid to the care and feeding of the board members. However, I think the ability to make the necessary changes to reach this state often seems out of reach. Board problems are usually high on the list of complaints of the nonprofit managers and board members I work with. Tensions between board and staff, unrealistic expectations about what board members can really do (given the demands of the rest of their lives), and the contradictions of a nonprofit legal system that gives boards legal responsibility for an organization they may actually spend very little time with, are not easily resolved.

However, while we're all trying to find creative ways to address these complex and sometimes sticky issues, Scribner's book can be of enormous help to groups that are looking for a hands-on approach, and for some great ideas for developing a stronger, healthier board. ■

Stephanie Roth, Associate Publisher of the Grassroots Fundraising Journal, also consults with nonprofit organizations on fundraising and organizational and board development.

Back Issues

VOLUME ELEVEN

Number 5 (October, 1992): 28 More (and Easier) Ways for Board Members to Raise $500; Some Straight Talk on Corporate Funding and Community Organizations; Everyone Wins at Our Fundraiser; Profile of a Major Donor; Report from the Road.

Number 6 (December, 1992): Budgeting for Fundraising; Corporate Philanthropy; Keeping Track of Information, Part 2; Gifts with Strings Attached; Book Review.

VOLUME TWELVE

Number 1 (February, 1993): But Will They Open the Envelope; Seeking Corporate Support; The Bowl-a-Thon; Profile of a Major Donor Couple; Report from the Road.

Number 2 (April, 1993): The Fundraising Letter; Getting Your Share of Workplace Giving; Report from the Road.

Number 3 (June, 1993): Do You Have an Effective Board of Directors?; The Reply Dèvice; What Good Givers Do; Report from the Road.

Number 4 (August, 1993): How to Develop a High-Dollar Giving Club; In the Public Eye; Book Review: *999 Tips, Trends and Guidelines*; Profile of a Major Donor; Report from the Road.

Number 5 (October, 1993): Dealing with Staff Discord; When Money Isn't the Problem; Fundraising in October; Getting Off Direct Mail Lists; Report from the Road.

Number 6 (December, 1993): Take Advantage of December; The First Staff Person; Clean Up Your Language; Free Software; Book Reports.

VOLUME THIRTEEN

Number 1 (February, 1994): Losing Your Funding: How to Cope; Two Magic Words; How to Create an Ad Journal, Part 1; State of the Journal.

Number 2 (April, 1994): Special Events, Part 1; How to Create an Ad Journal, Part 2; The Phantom Event; The Letter-Writing Party.

Number 3 (June, 1994): Special Events, Part 2; Why People Give: Mission-Driven Fundraising; Building the Upgrade Ladder; Multi-Event Fundraising

Number 4 (August, 1994): Creating An Annual Report; How to Raise the First (or Next) $50,000; The Cookbook Fundraiser; Book Reviews

Number 5 (October, 1994): Ten Mistakes You Can Avoid; How Hard Should You be Working?; All It Took Was Chutzpah; Book Review; Acknowledging Contributions

Number 6 (December, 1994): The Pitfalls and the Promise of Telephone Fundraising; Fundraising and Organizing: Sisters in the Struggle; 1993 Trends in Philanthropy.

VOLUME FOURTEEN

Number 1 (February, 1995): Recruiting Better Board Members; Choosing a Telephone Fundraising Vendor; State of the Journal; Book Review.

Number 2 (April, 1995): Effective Return Envelopes; When Nonprofit Staff Mess Up; When in Doubt, Think; The Annual Planning Calendar; Book Review.

Number 3 (June, 1995): Feeding the Homeless and Other Nonprofit Fundraising in the '90s; Don't Just Stand There, Say Something; The Corporate Volunteer Connection.

Number 4 (August, 1995): Thinking of Starting an Endowment?; Raising Money for the Right to Vote; Tax Consequences of Newsletter Ads.

ORDER FORM

Fundraising for Social Change
by Kim Klein
ISBN 0-9620222-3-3

____ copies @ $25.00 ________

$2.00 postage/handling per book ________

In CA add $2.00 tax per book ________

Discounts:
5-9 copies: 20%, plus $4 postage; 10+ copies: 40%, plus $6 postage

Sub-Total $________

Grassroots Fundraising Journal
Please allow six weeks for processing new subscriptions.

U.S. Subscriptions

____ 1 year @ $25 ________

____ 2 years @ $48 ________

____ 3 years @ $70 ________

Canada & Overseas Subscriptions

____ 1 year @ $32 ________

____ 2 years @ $62 ________

____ 3 years @ $91 ________

Sub-Total $________

Special Editions: $10
Discount: 10+ copies, 30% plus $4 postage.

____ **The Board of Directors** ________

In CA, add $ .82 tax each ________

____ **Getting Major Gifts** ________

In CA, add $ .82 tax each ________

Sub-Total $________

Back Issues
All back issues: $4.20.

Quan.	Volume & Number	
____	____________	________
____	____________	________
____	____________	________
____	____________	________
____	____________	________
____	____________	________

Sub-Total $________

Total Enclosed: $________

Name ________________________________

Organization ________________________________

Address ________________________________

City/State/Zip ________________________________

Change of address: Enclose mailing label and write new address above.

Credit Card Orders: ☐ MasterCard ☐ VISA

Card No. ____________________ Exp. date ________

Signature ________________________________

(Your credit card will show "The DataCenter" as seller.)

Make checks payable to:

Chardon Press
P.O. Box 11607, Berkeley, CA 94712
Phone: 510/704-8714 Fax: 510/649-7913
e-mail: Chardn@aol.com

Grassroots Fundraising Journal
P.O. Box 11607
Berkeley, CA 94712

Address Correction Requested

Bulk Rate
U.S. Postage
PAID
Oakland, CA
Permit No. 298