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**Our 15th Year**

**Grassroots**

**Fundraising**

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Most of Your  
Anniversary**

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Water Faucets**

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Printing Budget**

**We Need  
Money Fast**

**NNG's Common  
Grant Application**

**Donated Supplies  
for Nonprofits**

**Journal**

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*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.*

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# Making the Most of Your Anniversary

by Lucy Grugett and Stephanie Roth

*This article presents one organization's effort to use their anniversary as an opportunity to expand their fundraising program. Other organizations might be able to adapt some of these strategies for their own anniversary celebrations.*

The Center for Anti-Violence Education is a 22 year-old institution in Brooklyn, New York, that works to end violence against women and children on both individual and institutional levels, primarily through community education programs, self-defense courses and martial arts training. The hard work of our 3.5 paid staff people is greatly enhanced by the dedicated efforts of close to 50 volunteers.

Historically the organization has raised 35 - 45 percent of its income from fees, which gives it a distinct advantage over grassroots organizations without services to sell. But due to its unusual combination of martial arts training and a social justice approach to anti-violence work, other sources of support have been hard to come by. The perception that we are only a martial arts school, not a real "cause," has made foundations often reluctant to fund us and hampered our success with direct mail.

In 1993, we had 266 individuals donors (separate from students, who pay monthly class fees), who contributed a total of \$13,270. Events brought in \$11,500 more. As 1994 approached, we realized there was an ideal opportunity to use the milestone of our 20th anniversary as a way to increase the visibility of the organization, expand our fundraising capacity, and augment our donor base. We also saw the need to take risks in our fundraising activities in order to make a leap in our individual donor fundraising.

In order to maximize the fundraising potential of the anniversary, we planned to celebrate the occasion over the course of the entire year with a variety of activities, described below. For our 20th anniversary year, we decided to set the rather ambitious goal of raising \$100,000 from individual contributions.

With the small paid staff already overextended in programmatic, administrative and fundraising work, we decided to take what felt like a great financial risk: we hired a 20th Anniversary Year Coordinator to work between 1/2 day and 1 day a week for the year. She helped us develop a plan for the anniversary year, implement some components of the

plan, and help solve various problems along the way. We also hired an Event Coordinator half-time for 6 months to help organize the Gala Event that took place at the end of the anniversary year.

At the end of a very full year of activities and celebrations, the Center had raised close to \$80,000. This was short of our original goal, but was more than three times the amount we had raised the previous year from individual donors. We also increased our donor base from 266 to 483 donors, the largest growth in any previous single year. We now have a stronger base from which to expand and raise more money in the years to come.

As you'll read below, we did not have great success with every strategy, but we pushed ourselves to think big, take risks, and move forward with the momentum that a significant anniversary can provide.

## *Projects of the Anniversary Year*

1. *The 20th Anniversary Committee.* Recognizing that our board of directors was small and not very well connected in the larger community, we decided to organize a 20th Anniversary Committee. Our idea was to identify and solicit the participation of women who could help broaden our reach to new constituencies. We brainstormed a list of about 75 women, and ultimately recruited 35 to join the committee.

We first approached committee prospects with a letter, which presented a short history of the Center and its work, gave preliminary plans for the anniversary year, and described the responsibilities of committee members. We asked that each member of the committee attend three or four meetings during the year to generate ideas and build energy, join either the Major Donor Campaign or Gala Event Committee, and share skills and knowledge in areas such as graphic design, public relations, or connections with other community organizations. We also stated our expectation that committee members would take the lead by making a contribution to the fundraising campaign.

Follow-up calls were made to each committee prospect by the executive director, the event coordinator, or in a few cases by a board member. Because of time constraints, we did not interview prospects in person, but spent time on the

phone answering questions and determining their interest and ability to make a commitment.

The actual participation of committee members was mixed. Some were extraordinarily generous in giving of their time, energy, and money; some hardly participated at all. But most did make a financial contribution, attend at least one meeting, and help to get the word out about the end-of-the-year Gala. Moreover, the impressive roster of committee members on our letterhead was definitely noticed by foundation and corporate funders whom we solicited for support that year.

The Anniversary Committee brought new women from the community into the work of the Center. We have made important new friends, several of whom have continued to help us since the committee disbanded. We learned that having a formal relationship with people inspired support and, as a result, we plan to start an Advisory Council. Committee members also led us to new members for our Board of Directors.

2. *The 20th Anniversary Report.* Like many small non-profits, the Center does not produce an annual report, and we had no single piece of promotional material that encompassed our mission, programs, and history. We felt that a well-designed, nicely produced booklet with lots of pictures and limited text would be useful for both fundraising and promotional activities. We hired an outside writer for the first time, assuming it would speed up and streamline the process. We learned, however, that because of the need to "get it right," and solicit feedback from several key people in the organization, we needed much more time than we had originally budgeted. We hoped we could write, design and print the booklet in a couple of months, but it ended up taking more than four months to complete. If we had known to plan for several drafts going back and forth, it would have saved us much frustration.

In the end, however, we were pleased with the final product. It gave us a concise vehicle with which to introduce our work, and we benefited from the experience of putting together a more upscale and ambitious fundraising document than we had previously published.

3. *The Kick-off Event.* We launched the 20th anniversary with a reception/party, which took place on a week-night from 5-7 PM. We used it as an opportunity to reach out to current donors, potential supporters, and friends of the center, and to begin to solidify the participation of the 20th Anniversary Committee. The program included a short demonstration of kids doing safety/self-defense skits, a reading from a new novel about young women and violence by Jacqueline Woodson (a local author and friend of the Center), food and drink. No admission was charged, and a fundraising pitch was made by none other than Kim Klein, an old friend of the organization. More than 100 people attended, and we raised approximately \$3,500.

We did not plan the kick-off as a major fundraising event, but used it to bring people together who would be

involved in activities throughout the year, and to build excitement and interest. A lot of goodwill from that event translated into contributions, both monetary and otherwise, during the rest of the year.

4. *The Major Donor Campaign.* The Center had run Major Donor Campaigns with limited success for three

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years. This was mostly due to our difficulty finding people willing to participate (including board members), and the fact that we have a small donor base to draw from. For the anniversary year, the critical difference was having a larger number of people involved in asking, and therefore a larger pool of prospects. A major donor committee was formed, made up of 20th Anniversary Committee members, students from the Center, staff and board members. We ran an extended campaign through the spring, fall, and winter. We solicited our current donor list as well as new prospects for contributions of \$100 or more.

The campaign was far more successful than in past years, raising \$31,735. Although we did not reach our goal of \$50,000, we were pleased with the growth. We are beginning to understand that building a donor base takes time, patience, and persistence. Even with a larger committee, the Center's executive director and the anniversary coordinator made the bulk of the asks. Our largest individual gift, \$5,000, was raised by the executive director, but contact with the prospect was made with the assistance of a 20th Anniversary Committee member.

5. *The Children's Poster Campaign.* Young people make up almost half the membership of the Center, through the Children's Empowerment Project. For the anniversary, we invited the children to participate in an art project: Children's Visions of Peace and Safety. An artist donated her time to supervise two sessions (divided by age) and furnished vividly colored paper for them to make collages which, she told us, generally reproduced better than drawings. Working with the Center staff, the artist first led a discussion with the young participants about the kinds of images that represented safety and non-violence to each of them: a favorite relative's house, the beach, being in bed at home, playing with friends, a tree house, walking a dog, and abstract images as well.

The children created art work that was evocative and powerful. In keeping with our noncompetitive educational philosophy, we exhibited all the collages at a local university and at the Gala later in the year. Three that would reproduce well were chosen to be part of a striking 4-color poster (see illustration), designed by another volunteer. We were able to get a local politician to underwrite the cost of printing, which totaled \$2,500.

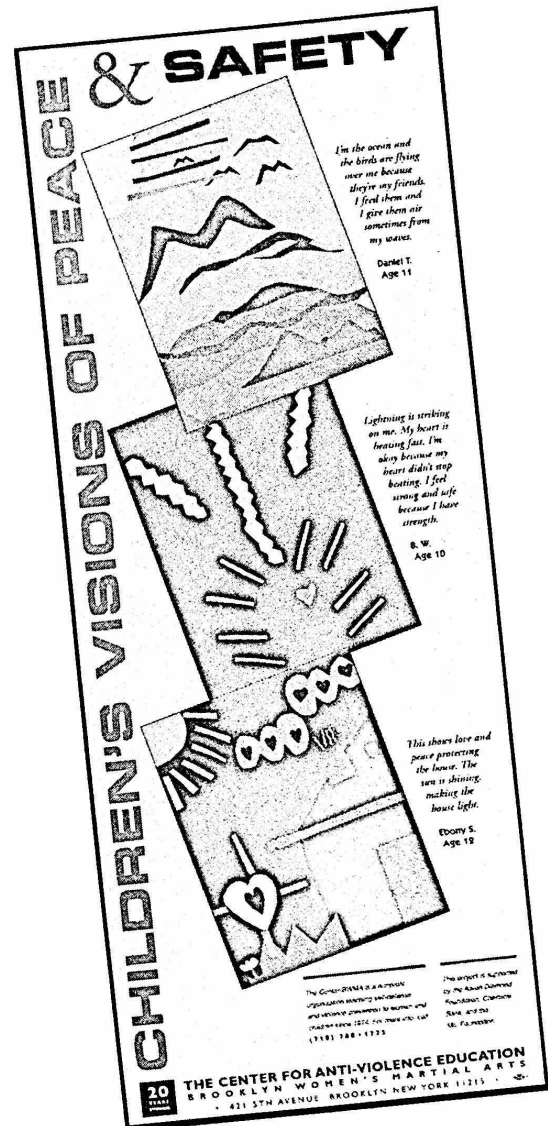
The Children's Visions of Peace & Safety Poster is a beautiful and tangible souvenir of the 20th anniversary and embodies the spirit of the Center's anti-violence work. We gave copies of the poster as thank yous to committee members and major donors. We also sold a few at the Gala and through our newsletter.

6. *The Neighborhood Collection Can Campaign.* To increase our visibility in the Center's immediate Brooklyn neighborhood and, of course, to raise money, we launched a canister solicitation campaign. Volunteers approached neighborhood stores and many agreed to let us park a can on their counter. Some merchants also made cash donations. Some turned us down because they said the canisters would be stolen and, alas, several canisters were taken (this is New York, after all). Since then, we've noticed that other organizations chain their receptacles down! We also made up "palm cards" that were left next to each canister for folks to take, with Safety Tips, information about the Center's programs, and resource numbers for rape crisis centers, battered women's shelters, incest hotlines and other support services.

A disappointing \$305 came from this campaign; although we didn't really know what to expect, we had hoped to bring in \$2,000 - \$3,000.

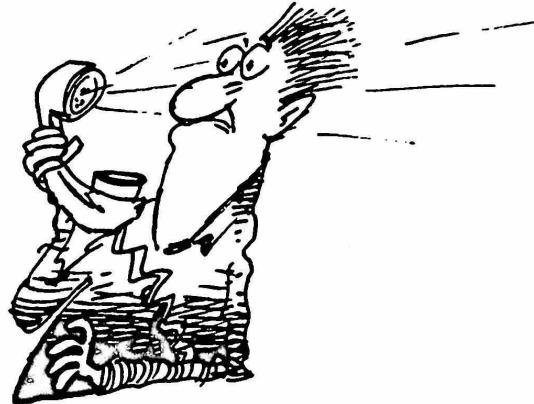
7. *The 20th Anniversary Gala Event.* The culmination of more than a year's activities, the Gala was the most ambitious event the Center had ever produced. We honored five individuals and organizations who had made important contributions to anti-violence work. Each awardee gave a short presentation about something that had inspired their work. It made for a very moving and powerful evening. A reception after the event gave the more than 300 people who attended a chance to mingle and partake of food and drink.

To increase the income from the event beyond ticket sales, we solicited sponsorships from individuals and businesses several months in advance of the event. More than 1,100 invitations were sent by the Center and committee members asking people to sponsor the event at different levels of giving. Basic admission was \$35, and sponsorship levels ranged from \$75 to \$5,000. This was the first time the Center used this standard fundraising device, and it was quite successful. We know that many people contributed at the \$125 and \$250 levels who would not have responded to non-event solicitations with that size of contribution. Corporate contributions totaled \$7,000, and contributions overall totaled \$25,829. A commemorative journal grossed nearly \$5,000.



The 20th anniversary was certainly the most ambitious fundraising the Center has ever attempted. It required an enormous amount of time and organizational energy, and would not have been possible without the assistance of our part-time consultants and our core of volunteers. Knowing this ahead of time is important. We would not have had the success in terms of money raised, donors acquired, and community members involved if we had tried to do it with our limited staff time. Ultimately, it was successful in pushing us past our comfort level in asking for large gifts, making the necessary long-term commitment to building our individual donor base, and sowing the seeds for a stronger, healthier organization. We're looking forward to celebrating another 20 years! ■

*Stephanie Roth is the Associate Publisher of Chardon Press, and a consultant to nonprofit organizations in fundraising and organizational and board development. Lucy Grugett is the Associate Director of the Center for Anti-Violence Education/Brooklyn Women's Martial Arts.*



# Donors Are Not Water Faucets

by Kim Klein

One of the hundreds of things I am curious about is how people concerned about social justice, who would be on the alert for signs of racism or homophobia if they heard a sentence beginning, "Arabs are..." or "Gay men are..." will let go unchallenged sentences beginning, "Donors are..." In fact, some of the people most sensitive to other kinds of oppressive attitudes and comments will themselves tell stories about "the donors" as though this group were of one mind and type.

Three incidents that have happened to me or people close to me in the past year illustrate some important points about how to deal with the people who make your work possible financially. These stories are all true, but I have disguised key identifiers to protect the guilty and the organizations that were involved.

## Karen

Karen becomes a member of an organization in 1981 with a gift of \$25. She believes in the work of the group and also likes the people involved. She becomes involved with the group, talking about its work with friends and colleagues, and asking people to give money to the group in lieu of birthday presents to her. She becomes friends with several staff and board members. Over time, in a very natural and well-done way, one board member and one staff member ask her to increase her gift — first to \$50, then to \$500 for a special anniversary, then to \$1,500. Karen is a well-paid professional, but this gift of \$1,500 represents a stretch for her, and makes this organization the recipient of the bulk of her charitable giving.

In honor of the group's 20th anniversary, the organization's development director, now a good friend, asks Karen

to consider giving \$5,000, as the group is building a small reserve fund. Karen agrees to give this amount over three years.

Two years later, Karen has moved to another state and the development director has left the organization. It is at this point that problems begin. Karen is by now the third-biggest individual donor to this group, yet after the departure of her friend on staff, she receives only newsletters and form letters from the group, including a form letter reminding her of her pledge every few months. Karen will fulfill her pledge because she is a woman of her word, but she feels less likely to keep on giving since the group has made no effort to stay in touch with her in any meaningful way.

## Stephen

Stephen is on the board of a small public foundation. The foundation raises money and gives it away to organizations working for social change. Stephen is a long-time activist and has never earned very much money. Many of the people involved in the foundation have inherited wealth and gift sizes tend to be large.

Knowing it is important for everyone to play a part financially, Stephen pledges \$200, to be paid \$50 a quarter. A staff member tells him that the foundation doesn't really need such small gifts. "Giving money is for the donors, not for activists," he is told. When he expresses surprise at this, he is also told that small gifts are not really worth the effort of administering.

Stephen brings the situation up with other activists on the board, who concur with staff: "Let the rich people pay for this. Why should we give money?" Stephen disagrees: "Everyone should be involved in both giving and raising

money because it gives a greater sense of ownership. Who owns this group, if only people with inherited wealth are encouraged (or even allowed) to give? Also, some of the 'donors' are also activists, and give a lot of time to social change work." Finding little support for his views, Stephen fulfills his term on the board and leaves the organization.

### Frances

A major policy disagreement leads Frances and three other board members to resign from their organization. Frances is a long-time supporter of the group, and was once chair of the board, but she is hurt by the lack of support for her right to disagree that she receives from the board members who remain. She has a high paying job and usually gives \$5,000 a year to the group. She pays her yearly pledge shortly after she leaves the board, but tells the executive director not to contact her for a year. She will continue to support the group, but does not want to be in touch for awhile.

A few months later, the organization gets into a financial bind and a board member suggests that the organization ask Frances for an extra \$5,000. The board member offers to ask Frances herself. The director approves this idea on the condition that Frances receive a letter outlining the financial bind and showing that the organization knows it is coming back too soon, but hopes Frances will understand the circumstances. The board member agrees to write such a letter and

follow up.

She gets very busy, however, and does not send the letter. Instead, she writes a quick note and sends it by overnight mail to Frances. "Frances, we are in a bind. Can you help with an extra \$5K? I hope you're not mad any more. I'll call you tomorrow to get your answer."

The letter is mailed on a Friday; on Saturday morning Frances gets a message on her answering machine: "I'm calling for your answer to my letter. It is very important that I find out soon. If I don't hear from you today, I will call you tonight."

Frances is angry and shocked by the informality and rudeness of the note and the call, so does not call back. True to her word, the board member calls at 11 p.m. "I waited as long as I could," she starts. "What's it going to be?" "You make it easy for me," Frances replies. "No."

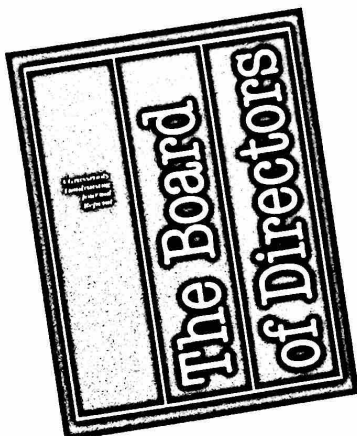
### Learn from Their Mistakes

If these were just isolated incidents, I might tell them over coffee with other fundraising colleagues so we could all shake our heads in disbelief. Unfortunately, however, I hear, see and even experience versions of these way too often. I also hear stories like these from other fundraisers. So, if anything like this has ever happened to you or your group, or

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you want to make sure it never does, here are some lessons you can apply.

1) *Build relationships* with donors among many people in your group. In Karen's case, she had a sense of belonging to the group that was facilitated by her living in the same community. However, organizationally, she only had one real contact in the group, the development director. When that person left, there was no official person assigned to keep in touch with Karen and to continue to make her feel part of the group.

An organization needs to have a list of its most important donors — people who give the biggest gifts, people who give the most time, people for whom the group is their largest gift, people who promote the group to others, etc. A staff person (the development director if you have one) needs to keep track of these people and make sure that they are known by several people in the group, so that if any staff or board member leaves the group, there is a logical contact person.

Karen's file was passed on to the new development director, but without a commitment to keeping in touch with major donors and key players, it is easy to see how a new person could put donor contact on the back burner. After all, you have a donor regularly paying a rather large pledge. It could seem better to spend the time looking for new donors and ignore the ones you have. But, of course, this is false time economy, and will result in the loss of some very important donors.

2) *Remember the point* of having individual donors, which is not just to raise money, but to have a team of people out in the world who care about your group. They give credibility to the group and they bring in their own friends. The money they provide can be spent on whatever the group needs, not just specific programs, and they require very little reporting.

A broad base of individual donors gives an organization freedom, community support, and a degree of self-sufficiency with their money. To maintain that base means remembering that fundraising is all about building relationships, and not about simply raising money.

In Stephen's case, a board member offers (clearly unsolicited) a decent-sized gift. Aside from the rudeness of turning down any gift, the organization has no commitment to building relationships with their donors. Steven's gift could increase over time — perhaps he will some day earn a high salary like Frances or even inherit money. By not valuing his \$200, the organization loses that and anything else he would eventually give, plus the gifts of all the friends he tells the story to. The donors to this group whose gifts are valued will soon realize that they are only valued for the size of the gifts, and will also begin to drop out.

3) *Screen volunteers carefully.* The director of the organization Frances was involved with exercised poor judgment in a number of ways, but most particularly when she gave the go-ahead for this particular board member to contact

Frances. She knew that Frances had felt unsupported by board members who remained on the board when she left, and should not have used such a person to approach Frances. Also, it is likely that this board member has a history of harebrained schemes, or of committing to tasks she does not complete or completes badly, as in this case.

4) *Use common sense.* Of course, the director referred to in #3 had already messed up when she allowed Frances to be contacted by anyone. She had made an agreement with Frances and she needs to keep it. If Frances is the only one that anyone can think of who can give an extra gift in their hour of need, this group is really in trouble. Just because Frances seems to "have the money" does not in itself mean she should be asked. Again, in this case, there is no commitment on the part of the group to a long-term relationship with the donor.

In dealing with Frances, the only contact that should have been allowed is a letter from the chair of the board expressing her concern and apology that Frances felt unheard and felt that dissenting opinions were not desired. Even if most board members disagree with Frances's interpretation, the chair can still apologize for whatever led her to think that and ask for dialogue. If Frances still wishes to remain incommunicado for one year, that should be respected.

## *Donors are Individuals*

Donors are not water faucets. They do not wish to be turned on for money and then turned off until more money is needed. Donors are not a homogeneous group about which broad generalizations can be made. Since everyone involved with an organization purporting to care about it (volunteers, board members) ought to give money and/or time above and beyond the call of duty (staff), any reference to donors should be taken to mean everyone involved in the organization.

Building a broad base of individual donors is for groups that want freedom from funder strings, and that value stability, accountability to their community, no overdependence on one source of money, and strong positive relationships with a wide variety of people. Of course, you say, who doesn't want that? In fact, I think many groups don't want it, because they don't want the work involved.

It is important for organizations that rely all or in part on donations from individuals to discuss at board and staff levels just what is entailed in doing this kind of fundraising. What responsibility does the group have to these people? What kind of a group has individual donors and how can the group maintain good relationships with these people?

Coming up with honest, serious answers to these questions and implementing a fundraising program that reflects relationship-building as the key element of fundraising will result in a strong organization that has the money it needs from people happy to give it, and to give of their time and expertise as well. ■





## 10 Ways to Get More from Your Printing Budget

Every organization needs printing, and it can be a large portion of their budget. Having seen thousands of jobs come across our counter over the years, we find that there are recurring issues that would save both clients and printers a lot of expense and aggravation. In our ongoing effort to save trees, tempers, and timelines, we offer the following tips.

1. *Be organized.* One person in an office should be responsible for handling all printing orders. It is not uncommon for two different people to place orders for the same job because of vacation overlaps, or for one person in an office to order a single set of business cards without knowing that their entire business printing design is to be revised the next week.

2. *Plan out the big picture* — audience and delivery method. What is it that you are trying to achieve? Efforts to reach upscale donors or informing membership usually call for different levels of flashiness and expense. Perhaps the best way to publicize your open house is a simple flyer rather than a three-color poster. Knowing the end recipient of the printed piece and how it will reach them is the first step in making smart printing decisions. Often getting advice from

direct-mail professionals and mailhouses will save you a lot of time and money.

3. *Use standard sizes and formats.* A 7x9" program booklet may be cute, but it could also cost you almost double what a 6x9" one will. Don't make assumptions about standards — one common mistake is to base booklets on a legal-size sheet (8½ x 14") which is not efficiently available in papers other than 20# bond. Let your designer/printer know that you are flexible and interested in cost-saving suggestions.

4. *Accurately assess your numbers.* Nothing is more frustrating for a print buyer than to order a mailing of 5,000 and then be told when the job reaches the mailhouse that the actual mailing list is 6,500. Rerunning a job is slightly cheaper than it was to print the first time, but it is still dramatically more expensive than a longer run to begin with. If you need exact count, be sure to let your printer know — trade customs allow that quantities of 10% over or under your order are acceptable.

5. *Try to use the most appropriate reproduction method.* Roughly speaking, the best way to reproduce small quantities (1-500) of a document is by photocopying, the

next step up (500-2000) is "quick printing" (disposable plates), then offset printing with metal plates (500-10,000), and finally web printing (for very large numbers), running from rolls of paper. Other technical factors that will affect your options include use of photos, desired print quality, choices of paper, and ability to gang parts of a job together. It is important to note that as organizations get bigger (or smaller), their printing needs change. The corner copy shop

that printed their small-run 4-page newsletter may not be the best place to handle their larger-run 8-page newsletter. Also, just because something is physically small doesn't mean it should be printed on a small sheet — it is often most efficient to run large numbers of flyers several up on a large sheet.

6. *Donated paper and services.* Sometimes non-profits can get expensive portions of a job donated, such as paper or color separations. In all cases, be sure that you work with your designer/printer to make sure that the materials supplied meet their technical specifications. For example, paper should be of a type suitable for the job, it must be an appropriate sheet size, it must show up in time to print and be in good condition. Be prepared to use a house sheet as backup in case the supplied donated paper doesn't work.

7. *Get appropriate graphic design.* Good design can make or break a printed piece, but be sure that whoever you use is familiar with your budget and audience. A classic printer's nightmare involves equal parts designer fresh out of school looking to create an award-winning product, an overworked client giving said designer free rein in putting together an annual report, and an unspecified budget. Using volunteer design and type can be a great idea, but be careful. Not all designers are attuned to the slim budgets of non-profits, and the recurring costs of producing overdesigned printing may be far more than a single fee to a professional who has the long-term interests of the organization at heart.

8. *Late changes.* It may seem obvious, but make sure that copy is proofread before it goes off to the designer. Catching a misspelled donor's name at a blue-line proof could easily cost you \$50 or more.

9. *Rush work.* Again, planning helps. Aside from additional charges, rushed work leads to shortcuts and hasty proofing, which leads to errors, and then everybody is unhappy. This problem has recently been compounded by developments in desktop publishing, where it is very often the case that no one has seen the final piece at full size until it's at an advanced proofing stage. Tight schedules work best when you call ahead to schedule time and have the technical people talk to each other to make sure there are no nasty surprises.

10. *Price is not everything.* Saving a few dollars on a job is usually no reason to drag your printing all over town. Other factors to consider in a long-term relationship with your printer include volume discounts, the convenience of having film or type on file, their familiarity with your work and staff, and supporting union shops and affirmative-action vendors. If you are a regular account, letting your printer know that a particular project needs some financial support may well result in a discount. ■

*Inkworks is a collectively owned and operated printshop that has been serving the movements for peace and social justice since 1974. It is a union shop and a Woman-Owned Business. Inkworks is the printer of the Grassroots Fundraising Journal.*

## Some Useful Terms

Most printers will work with you to understand technical issues affecting a job; knowing some of the basics will help get you off to a good start. These are some common terms in the trade:

*Bleed* — when the ink "runs off" the edge of the sheet (like the cover of this magazine); in reality it is printed on a larger sheet and then trimmed.

*Folds* — some folds are easier (and cheaper) than others. Simple folds are half-fold, letterfold, Z-fold, accordion (like a Z-fold but more panels), and barrel or roll fold. The trickiest parallel fold is a double gate fold, in which the two outside edges fold towards the center twice; this adds time and expense.

*Cracking* — this is the result of the paper surface and/or ink film breaking on a fold, and is most undesirable where there is heavy ink. Heavy stocks and coated paper aggravate this situation; special scoring minimizes it.

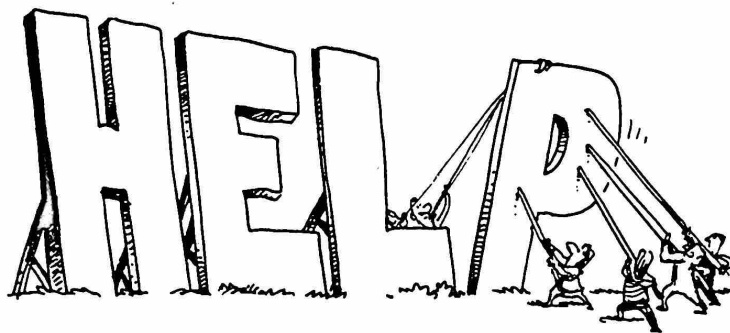
*Register* — the fit between the edges of a multi-color job. Images with very tight register over large areas are more difficult, especially for small press work.

*Trapping* — similar to register, it is where one color of ink slightly overlaps another to give the illusion of fitting together exactly.

*Halftone* — the technical trick used in printing to reproduce a range of shades with a single color of ink by breaking up the image into tiny dots. All printed photographs use some version of halftoning. It is increasingly common for documents created in electronic format to have the photos scanned in, which halftones them. However, beware of poorly done scans; when in doubt, ask for a proof before printing and allow time for fixes. A related item is a screen tint, which is a filling in an area with percentage of solid ink. Very dark tints (over 70%) tend to "fill in" to solid when printed.

*Pinched type* — the filling in of small lettering that reverses out of a solid background.

*Ghosted image* — "screening back" (halftoning to a lighter shade) of an image or solid to allow for type to be legible in front of it. This can sometimes be hard to read if the background image is busy.



## “We Need Money Fast”

by Kim Klein

I knew there was a problem when the Executive Director of a group I had never heard of left three messages on my answering machine over the course of two hours. The last message was the most pitiful: “Please call day or night. Wake me up even. I probably won’t be sleeping anyway.”

I called and spoke to a man whose voice shook with emotion. “We are in real trouble,” he started. “That’s good. I hate false trouble,” I said, hoping to lighten things up. It did not help. “No, really. We owe \$3,000 to FICA [payroll tax] and if we don’t pay we’ll get fined and start incurring interest and we owe another \$2,000 to various people, including our staff. We need it in 15 days.”

This man’s group had gotten into this bind when a board member had received a verbal promise from a foundation program officer that their grant proposal would be funded. A few days later, the proposal was turned down; attempts to reach the foundation board member had failed. Part of their panic stemmed from two other facts: the group had been audited a few years ago and did not want to risk any ill will with the IRS, and prior to this director’s tenure there had been a history of bad cash management. He did not want the group’s former poor reputation to be resurrected by their current problem.

“How can we raise money quickly?” he pleaded. Because this is a common question, I thought *Journal* readers might profit from what this group did.

### **Calm Down — Then Ask**

First, the group examined their cash flow. What if they got \$5,000 and paid these bills? Then what? What plans did they have for future solvency?

It turned out they had a pretty good assurance of not-

too-distant income. Between scheduled mailings to current donors, planned house parties by board members, and other grant proposals in the works, this was clearly a cash-flow problem and not a chronic cash-management issue. Their projections showed that they would be in the black if they could weather this disaster.

To help them figure out what to do in the meantime to get the money they needed immediately I met with their board. They were almost as panicked as the director. I felt my main job was to get them to calm down, which was more important than any content recommendations I could make. Being mostly a board of people with low incomes, \$5,000 seemed scarier than it might have to a more well-to-do group. I told them that many groups carried a lot more debt than this, and the worse thing that would happen is that they would take a cash advance on their organizational credit card to pay the IRS. They would pay 18% interest, of course, but they didn’t need to be afraid of not paying their bills. This caused some relief.

Then we started with options. We ruled out the obvious option of finding two or three donors who could make large extra gifts in a hurry. This group only knew a handful of people like that, and they had been used in previous cash crises. Both the board and director were eager not to drag them into this one.

The first part of our plan was for two board members to call all the vendors who were collectively owed the \$2,000 and ask if the group could pay a little now and more later. Vendors are often amenable to arrangements like this, so long as they know the group intends to pay.

I asked the board if any of them could make an extra gift right now. Surprisingly, this raised \$500. People’s spirits rose.

Five board members and the director reviewed the

donor list and divided donors into three categories: loyal donors who loved this group and wouldn't think badly of them getting into this jam; donors whose last gift was anywhere from 15 months to 9 months earlier and could be asked to renew by phone; and everyone else. We would phone the first two groups.

Next board members made a list of the friends they would go to if they were personally in a financial jam. We set \$10-25 as the amount we were asking for. One board member seemed to speak for all when she said, "Everyone I know gets into these situations every so often. I've helped a lot of people out in times like these, and they will be willing to help me."

We set two evenings and a Saturday of the following week to call all these people. In all, we had 400 people to call and 8 callers. Two board members sheepishly said that they just could not make these calls, but wanted to do their share. We gave them the job of writing thank-you notes and also of going around and picking up checks from people as they pledged.

The phone script for board member friends and for group one (people who would not think badly of a group for getting into a jam like this) was simple and straightforward: "I am a volunteer for Excellent Group, and we have a problem we hope you can help us with. Can I talk to you for just a minute?"

[If yes] "We need to raise \$3,000 in the next fifteen days. This is a simple cash-flow problem, caused by some funding we had counted on that didn't come through, and we are hoping you could help us."

[Pause for question or comment. Often there is no comment. If no comment] "Do you think you could give an extra \$25 in the next few days?"

[If yes] "Would you like to mail that in, or would you mind if someone came to pick it up?"

Most of the people who agreed to give also agreed to have someone pick up the check, if that was logistically possible. Of the 400 people called over the three days, about 150 were reached and a whopping 100 of them were able to help. Most gave \$25, some gave \$10 or \$15, but a handful the group thought could give more were asked for and gave \$100, others gave \$50. In all this group contributed \$3,045. The drivers collected most of it the day it was pledged and the rest dribbled in over the next week.

A week after the director's frantic phone calls, the organization had raised \$3,545. Because people were so understanding about the cash-flow problem, the group decided to call another set of donors: people who had made their first gift in the past two years who did not fall into the first of the two groups we had already sorted for. During the previous two years there had been no cash management problems, and so these donors had never received a crisis call or letter from this organization. We called 75 people in this group; 25 gave a total of \$550.

At this point, with their FICA debt covered and many of

their vendors paid or partially paid, the board decided to stop raising emergency money and hope that their regular fundraising plan would raise the remaining \$495.

### *What They Learned*

Before I left them, I asked them to summarize what they had learned from this experience. One big lesson was not to count on any verbal pledge of money. To be truly conservative, and thus never surprised and caught short, only money in the bank should be counted on, and there should be enough there to get a group through at least two months. In the reality of many grassroots groups, money pledged is often counted on, and so it is important to know who you can count on and who you can't. In my experience, neither foundation staff nor board members can make verbal promises of funds to come and it is not wise to depend on any such promise, even if one has turned out to be true in the past.

A second lesson is that people will respond when asked. This emergency forced many board members to learn how to ask friends for money. They didn't have time to think about all the reasons why asking friends was awkward or embarrassing. Several board members suggested making the phone-a-thons a regular part of the fundraising year.

This organization was in good shape to weather a crisis like this. First of all, their donor records were up to date and easy to sort. Board members did not resist doing their fundraising job and even those who felt uncomfortable calling pitched in to help. There was a genuine team feeling and no time was spent searching for whom to blame for this disaster. Some of the problems they had gone through in previous years had helped them become more organized. This was simply a fundraising problem, and had no other meaning.

The main lesson was that planning what to do was not hard. The director had panicked and the board was panicked. But there was no need and no use for panic. I did not solve their problem. I simply had them look at their need, and they solved it. They asked the key questions. Do we have one person who can pay for all of it? No? Two people for half each? No. Ten people for 10% each? If not, then how many are needed and for what amount each?

Make a list. Work the list. Ask. If you ask enough people, you will get your money. ■

#### **Errata:**

Maria Gonzales, the author of "Everything I Know about Giving..." in our April issue, is the Development Director for California Rural Legal Assistance, not the CRLA Foundation. We apologize for the error.

## The National Network of Grantmakers'

# Common Grant Application

## Can Save Time and Money

by Robin Kroft, Kathy Partridge and Jodi Williams

As the song goes, eight days a week is not enough . . . for a grassroots organization to actively apply for foundation support. You often have one person trying to do the work of fundraiser, executive director, field organizer, etc., or precious volunteer time being spent in preparing one slightly different, often idiosyncratic proposal after the next. Couldn't we make the whole process a bit more simple?

The National Network of Grantmakers' Common Grant Application (CGA) is a tool for narrowing the gap between activists and social change funders while saving grantseekers time and human resources. A review team of more than forty grantmakers and grantseekers created a form with broad appeal for grantmaking from arts to health care. At present, more than 30 grantmakers accept the CGA.

The CGA produces clearer, more complete proposals, especially from fledgling groups, according to participating foundation staff. Accepting the CGA hasn't resulted in a flood of inappropriate proposals. It makes clear that it's still up to grantseekers to make sure their projects fit funders' interests.

One way to increase the amount of funding going directly to social change work is to *decrease* the amount of money diverted to fundraising expenses. The CGA helps to

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*The CGA produces clearer,  
more complete proposals.*

---

demystify the process of grantwriting, which has become increasingly professionalized — carrying a hefty price tag for grassroots groups.

The CGA will only save time if more grantmakers will accept it. Grantseekers can help make this happen by putting it to use, and by encouraging nonparticipating grantmakers to sign on.

The Foundation Center has posted a downloadable version of the CGA on its internet site at <http://fdncenter.org>. The National Network of Grantmakers Directory, a useful grantseeking tool that includes the CGA, is available for \$25 (+ sales tax in CA only) from NNG, 1717 Kettner Blvd., San Diego, CA 92101. ■

*The authors are affiliated with the Common Grant Application Committee of the National Network of Grantmakers.*

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## Announcement

### Donated Supplies for Nonprofits

Soliciting donated supplies from businesses, especially companies hundreds of miles away, can be beyond the scope of the average nonprofit organization. To avoid this problem, nearly 7,000 nonprofits across the country are using the service of the National Association for the Exchange of Industrial Resources, or NAEIR. In the past 19 years, this 501 (c)(3) nonprofit has collected and redistributed over \$800 million worth of new, donated supplies.

Recipient groups receive such things as office supplies, computer software and accessories, toys and games, clothing, tools, maintenance items, paper products, and seasonal decorations.

Annual dues are \$645. Recipients also pay shipping and handling, but the merchandise itself is free. NAEIR says its members average \$9,000 worth of new merchandise a year, requesting what they need from 300-page catalogs issued every ten weeks. A computer decides who gets what, and all first-year members are covered by a money-back guarantee.

For a free information kit on NAEIR's service, call 1-800-562-0955; fax: 1-309-343-0862; e-mail: [member.naeir@misslink.net](mailto:member.naeir@misslink.net); home page: <http://www.misslink.net/naeir/naeir.htm>

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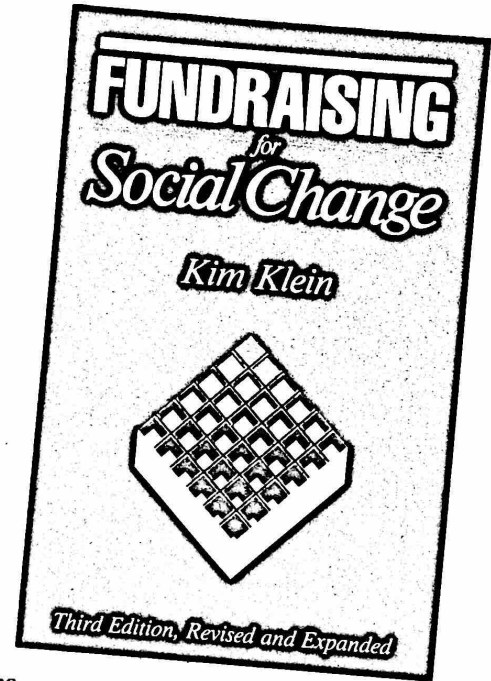
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