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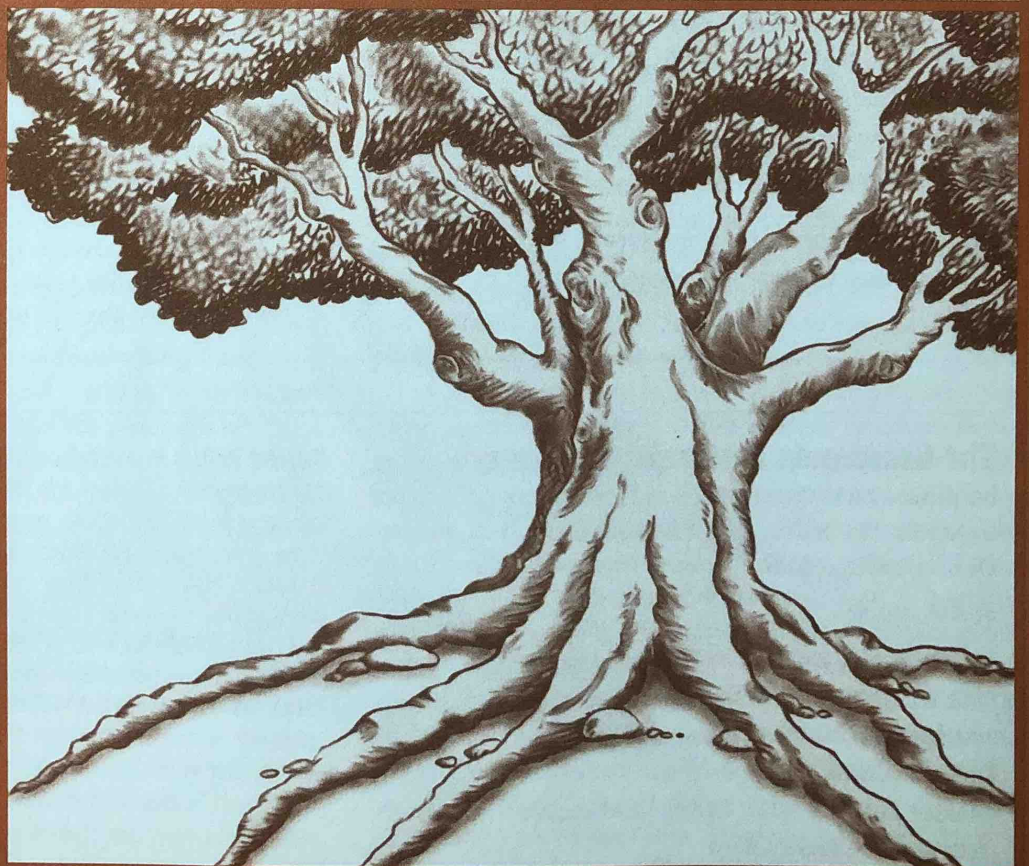
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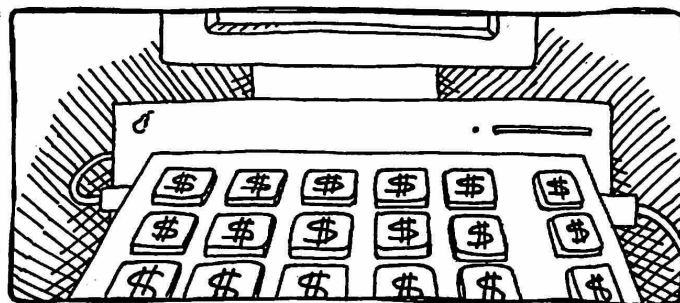
**CHARDON
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Looking at Fundraising Software Programs

by Maryann Osmond



In a previous article in the *Journal* (Vol. 15, No. 6, December, 1996), I suggested a three-part process for choosing fundraising software to meet your organization's needs: 1) knowing your needs (budget, capabilities, etc); 2) reviewing software with specific questions in mind; 3) asking questions about system support, ownership, upgrades, and other relevant issues.

This article focuses on the second part of the process and reviews four fundraising software programs: DonorPerfect, Donor Works, Giftmaker Pro, and Fundraising Basic. As a DOS/Windows user, I was not in a position to review any Macintosh-based systems, but two of the programs reviewed also offer MAC versions. The chart at the end of the article lists a number of other programs that I have not reviewed; it will give you an idea of the range of programs available for Windows, DOS and MAC users. Using the questions raised in this article, you can review them for yourself. All software companies will send you a demonstration disk.

In reviewing these four programs, it is impossible, of course, to mention every feature or component of each program. You will see that each system contains varying degrees of sophistication and complexity. In some cases, the software may contain more "bells and whistles" than your organization needs. On the other hand, you may appreciate the software's size and possibilities because your organization's needs are growing. If, for example, your organization hopes one day to mount a capital campaign, you will want a

software program that can help you track your major donors.

After all is said and done many, if not most software programs (those reviewed here and the countless others on the market) offer very similar options and features. What distinguishes one from the other is often price, technical support and the flexibility and adaptability of the program. As with any product, it is important to be savvy about the software company's marketing and sales pitch. The prettiest and glossiest brochures do not always translate into the perfect software for your organization.

A note on my own experience: For the past nine years, I have used DonorPerfect (DOS version) and have been so satisfied with the program that I have recommended it to many other nonprofits: I am now converting to the Windows version. In reviewing these other software programs, however, I have experienced a bit of "buyer's remorse!" I would be quite happy with any of these programs, in particular with those that offer a Windows version. I was impressed with the basic features of each program and the ability to tailor each to an organization's particular and unique needs.

In the reviews below, I may have misinterpreted, misrepresented or overlooked some feature of the software. If you are a user, please contact me at the *Grassroots Fundraising Journal* with any of your own experiences. In addition, let me know about any other affordable programs you especially like (and why) and we'll tell *Journal* readers about them in future issues.

Four Fundraising Software Programs

Here are the vital statistics and a brief summary of the four programs reviewed here. The discussion that follows is based on the qualities one should look for in fundraising software as described in the previous article.

• DonorPerfect

Operating Environment: DOS and Windows

Price: Single User, \$2295; Multi User, \$3895 (also a limited version for \$1200)

Support: \$350/yr

Company: Starkland Systems, San Diego, CA; 800-748-6639

A software program that can meet the needs of a small or large nonprofit. The program is easy to use, straightforward in layout, and priced so as to be affordable for most nonprofits.

• Donor Works

Operating Environment: Windows and Macintosh

Price: Single User, \$2495; Multi User, additional \$500 per user

Support: Several packages, range from one free year to \$1200/yr

Company: StarSoft Technologies, Spokane, WA; 800-327-1476

A thorough and comprehensive program that offers all the necessary components for all levels of a development program. The system seems pretty basic to learn and easy to use.

• Giftmaker Pro

Operating Environment: Windows and Macintosh

Price: Single User, \$3490; Multi User, \$3990

Support: Single User, \$690/yr; Multi User, \$890/yr

Company: Campagne Associates, Nashua, NH; 800-582-3489

Offers a full range of features. Software appears flexible enough to be tailored to meet your organization's needs. In addition to managing donor information and giving, the program includes membership management, major donor prospecting and tracking, donor profiles, extensive user preferences, detailed daily reports, etc. You can add software at additional cost for events and reports.

There is a much less expensive version (\$975 for a single user) that has many of the above-mentioned features. Also, they offer "special bundle pricing," which offers significant savings over items purchased separately.

• FundRaiser Basic

Operating Environment: DOS (a Windows version is promised for spring, 1997)

Price: \$79 (Yes, that's \$79)

Support: Free support for first 3 months; \$59/yr thereafter

Company: Professional Software Support, West Plains, MO; 800-880-3454

A good, inexpensive program for a small nonprofit with basic fundraising needs and a small budget. This software is ideal for any group that is just starting out or is finally getting names and gifts onto a computer. Because the program is so basic, it is easy to use even for the computer-impaired fundraiser!

Because FundRaiser Basic is indeed a basic program, it has most, but not all, of the capabilities of the more expensive programs reviewed here. However, the company offers other software that is more powerful and flexible: FundRaiser Professional for DOS, FundRaiser Jr for DOS.

Discussion

The programs are coded as follows in this discussion: DonorPerfect: DP; DonorWorks: DW; Giftmaker Pro: GM; FundRaiser Basic: FB.

1. How many names and what types of information can the software hold?

All four programs can hold an unlimited number of names. You are limited only by the memory size of your computer system. In addition, the programs have these donor screen features:

DP: Displays information on two main donor screens: one contains biographic and demographic information, the next stores professional information and giving history. Going back and forth between these screens to get a donor's full picture is a slight limitation, but made much easier in the Windows version, where only a click of a button is needed. User can add fields unique to the organization. A "Memo" field allows for unlimited entry of anecdotal/narrative information.

DW: As with DP, has two main screens per donor. The primary screen, called "Demographics," has four categories of codes: classification, status, user-defined and source. Within each category, it is possible to define the range of donors within particular parameters. A secondary information window holds other information such as birth date, marital status, profession, etc. User can also create fields unique to the organization.

GM: The master record window includes the following fields: name, address, biographical information (occupation, birthday, social security number, sex, marital status). Many of the fields may be set up as default entries.

FB: Donor record screen contains name, 2 address fields, salutation, date of first gift, phone, donor type, category code (groups names in various ways: board member, volunteer, prospect, etc.), contributor type code (individual, business, foundation, etc.) and gift summary (total giving, YTD, last amount, last date, plus notes screen).

2. How user-defined is the system: Can you make changes to the screens? Can you add fields to increase segmentation possibilities?

Each Windows-based program has extensive user-defined options that allows an organization to set up codes to meet its own reporting needs. For all programs, there are some fields that are required and cannot be violated or defiled!

DP: There is ample room for modifying or adding fields to the donor and gift screens. On donor screen #1, for example, it is possible to add several user-defined fields, remove fields from the screen but not delete them from the system, and change the name prompt for a field. Fields can be added and codes created, such as a membership field with a list of codes defining different types of membership.

DW: The program seems flexible and straightforward in creating user-defined codes.

GM: Master screen contains four user-defined fields. In addition, user can define the default for a specific field. For example, all your donors, prospects or members may live in one state, so the State field could be defined as a default.

FB: The program does not allow for any modifications.

3. Can donor/prospects/clients be found quickly and easily? Is there more than one way to locate a given record?

All the programs can be searched by full name, last name only, one or more letters of last name only, or city, state or zip. Two have additional features:

DP: Can enter the record number in the last name field.

FB: Can also search by category or code, but brings up first donor screen, then you must scroll to find the name you want.

4. Does system accumulate two-name records, and do mailing labels show both names automatically?

All the programs allow you to add a second name and all will print both names on labels. GM has these additional features: you can search on a secondary name; there's an option for several addresses and the ability to switch between primary and secondary addresses; there are several options for salutations: person 1, person 2, both people.

5. How does the system link gifts?

All the programs except FB have means of linking donors through codes, family relation, interests and other categories.

6. How does the system guard against duplicates?

All the programs have ways of guarding against duplicates, with these variations:

DP: Three ways to protect against duplicates: 1) when entering a name, the system will list all records with same last name; 2) you can run a list of duplicates by either same name (first and last) or records with same address; 3) the auto-combine option lets you scan through a list of possible duplicates (name/address/or both) and combine two records together.

DW: In the "People Pop-Up Menu" you can combine duplicate donor records. Also, when entering a name, the system will list all similar names, with addresses.

GM: The system displays an error message that a similar name exists and then lists all last names that are similar. There are also other, more sophisticated, checking abilities to eliminate duplicates.

FB: When entering a name, the system will list all records with same last name.

7. Is it easy to move around with a minimum of keystrokes? Can you move forward and backward on a single screen?

DP: Easy-to-understand keystrokes, and well-labeled options for moving to another screen. Can use the key-

strokes to navigate around a page. (In Windows version, use the mouse to move around on a page.)

FB: DOS program has simple, well-labeled keystrokes. Can move around or go to a new page with a minimum of effort.

DW/GM: Windows-based programs, point and click for quick access to information. Like Macintosh programs, Windows software all have pretty much the same look and feel, which helps in learning and reduces training time.

8. Can the system accommodate lapsed donors without deleting them?

DP/DW/GM: Donors in any condition (lapsed, deceased or whatever) can be maintained; user deletes at own discretion. Also, field called "No Mail/Phone" can be used to manage lapsed or deceased donors.

FB: Can only delete any donor manually and then, each gift needs to be separately deleted. No problem with maintaining lapsed donors.

9. How many different ways can you segment or categorize a prospect or donor? Can you design reports to match your needs or are you limited to what is established?

All the programs will generate some reports, all of which can be displayed, printed or exported. Some programs have wider ability to generate custom reports than others.

DP: The list of possible segmentation is long and flexible because of the option to create user-defined codes. A prospect/donor can be segmented by giving history (size, date, solicitation, etc.), geographic location, interests, etc. The program contains some default reports and also the option to create custom reports. The custom report feature would take some time to master if you are unfamiliar with Dbase functions. The manual is helpful in taking you through the steps of a Custom Report.

DW: Beyond the basic segmentation possibilities (name, city, state, zip), the program offers "power searches" that allow for specified searches on almost any information or combination of information; e.g., everyone living in Ohio who gave more than \$500 two years ago but who have given less than \$200 this year. The program has the expected default reports: donor, gift and many combinations of the two. Beyond these, the search function offers extensive options for creating your own reports.

GM: The program has extensive reporting options that let you select, search and sort on data in any combination: gift history, campaigns, biographical, memberships, classifications (board member, donor, alum); relationship, events attended or supported, etc. In addition, it is possible to print reports that detail donor's support of all appeals, campaigns, events, etc.

FB: Can segment by donor type or donor category, gift source, total amount given, amount given this year, date last

OTHER FUNDRAISING SOFTWARE YOU CAN CHECK OUT

The following chart provides a representative sampling of the range of fundraising programs available. I have not reviewed any of these programs but, using the questions raised in this article, you can review them for yourself. Call the software company for a demonstration disk.

NAME	OPERATING SYSTEM	PRICE: SOFTWARE	PRICE: ANNUAL SUPPORT	COMPANY LOCATION	PHONE
DonorMasterII	Dos, Novell	Single User: \$1800	\$750-\$1500/yr	Master Systems Pinole, CA	800-827-7214
DONORS	DOS, Novell	Single User: \$695 Multi User: \$995	\$498/yr; \$60/hr \$689-1499/yr; \$60/hr	JSI FundRaising Systems Boston, MA	800-521-0132
ECHO Development Systems	DOS, various LAN systems	Single User: \$995 Multi User: \$1495	\$295/yr \$345/yr	ECHO Consulting Services Conway, NH	800-635-8209
Fund-Master	Dos, Novell Unix	Single User: \$3900 Multi User: \$3500	\$650-\$1300/yr \$950-\$2700/yr	Master Software Corp. Indianapolis, IN	800-950-2999
FM Light	Dos, Novell	Single User: \$1500 Multi User: \$3500	\$500/yr \$1200/yr	Master Software Corp. Indianapolis, IN	800-950-2999
InfoTrak	DOS, MAC version planned	Single User: \$1800	1st yr included	Glick Associates Portland, OR	503-244-5278
MacTrac	MAC	Single User: \$1295 Multi User: \$1790	\$250/yr	TRAC Menlo Park, CA	800-676-5831
Excell	Windows, MAC version late 1997	Single User: 2900 Multi User: \$3900	\$595/yr	TRAC Menlo Park, CA	800-676-5831
Results/Plus	DOS, Windows Novell	Single User: \$2995 Multi User: \$3995	\$945/yr \$1295/yr	Metafile Information Systems Rochester, MN	800-638-2445

given, but cannot search by city, state, year of graduation, for example. There are two basic reports: Deposit and Donation. Deposit report can be used as a general purpose report for a listing of contributions (amount, date, check). No options for creating or using additional reports.

10. What are the possibilities for protecting access to the program with passwords?

All except for FB allow you to create passwords, some have additional features:

DP: Can define several levels of entry with passwords. Also, you can automatically place the user/operator's ID in each donor record.

DW: Different levels of security allow limited access to some areas. Each "worker" has an ID that allows for tracking of work entered, edited or deleted.

11. Is the Gift/Pledge entry process easy and straightforward?

All programs reviewed have easy gift entry and acknowledgment procedures. All can assign different thank-you letters in the same batch (e.g., one donor may receive an Annual Appeal thank you and another a Golf Tournament thank you). While all allow you to look up the source of the donation (what solicitation the gift was in response to), FB cannot track pledges.

12. Can the program accommodate non-accounting gifts?

All four programs accommodate "In-Kind" gifts. In all cases, the user can define a gift type that would include "in-kind." In addition, each program offers space for notes about the nature of the gift. **GFI**

GFI FAN MAIL...

Dear Kim,

Yes! The new look is so right. Lisa is my favorite illustrator — my group uses her too. Cici has done a masterful job of formatting with sufficient variety for clarity, yet balanced with not being so busy as to distract from the message or draw attention to itself. I'm a fairly judgmental person about layout and design, with vivid opinions about aesthetics and effective communication, and I find not one change that chafes. Remarkable (thus my remarks!).

Thanks for the good work, everyone. I read all of every Journal, and for me that is extraordinary.

Ross Herbertson



You Already Know All the People You Need to Know to

Raise All the Money You Want to Raise

by Kim Klein

The title of this article is a phrase I often use in my fundraising trainings. It meets with skepticism, denial, laughter, incredulity, and occasionally two reactions that mark people who might actually go somewhere in fundraising: horror and relief. It is obvious why relief would be a great reaction to have to the idea that you already know the people you need to know, but why horror? People who are horrified by this notion realize that their best prop has just been knocked down; the excuse that worked when all others failed has just failed. If they already know who they need to know, what is stopping them? How can they not raise money? Their horror is that they have been found out. But many of them recover from horror and go on to raise money.

What does it mean that you know who you need to know in order to raise the money you want to raise? Simply this: As we point out every year, and sometimes more often, the most money given away in the U.S. comes from middle-income, working-class and poor families. This happens to be most people. Most people give away most money. This is good news. Imagine if most money were given away by corporations — we would have even more elite universities, a handful of well-funded arts groups, and a lot of funding going to research, scholarships, and cause-related themes. If, similarly, most money were given away by foundations, we would again have a much smaller landscape of nonprofits, with a much greater focus on large organizations. The concept of grassroots fundraising and, consequently, grassroots groups, would not exist.

We have a diverse, creative, and extraordinary group of nonprofits because we have a diverse, creative and wonderful population of people who give away money.

In 1995, however, an ominous trend in grassroots giving was tracked and analyzed by the research wing of the Independent Sector, a coalition of nonprofit organizations that provides research and advocacy on behalf of the nonprofit sector. Virginia Hodgkinson, vice president of research at the Independent Sector, reported that the 68 million households that had made donations in 1995 was 4 million fewer households than had given in 1993, a drop of nearly 5%. Part of this loss was attributed to who was asked for money. The survey reported that only 60% of Americans were asked to contribute to nonprofit organizations in 1995, down 17% from 1994. Clearly, millions of people who would give are not being asked!

Why Aren't People Being Asked to Give?

Nonprofits have caused the problems themselves: they focus on the wealthiest potential donors and often pass over lower-income or middle-income households. "If they are targeting more affluent households, they are losing other participants in society," commented Hodgkinson.

Now, one of my own areas of promotion as a fundraiser and trainer is major gifts — how to find them and how to get them. As a consequence, I feel some responsibility when I read a study like this. But perhaps my full message has not been heeded, as I always stress that even your biggest gifts may not come from your wealthiest

donors. Giving and Having are often unrelated. Havers have. That's why we call them "the haves." Even some very poor people are "haves." What little they have, they hang on to. Some very wealthy people are "haves" also. They hang on to the great deal that they have, and they try to have more.

In fundraising, we must focus on givers. Since most people give when asked and, as corollary studies show, do not give when not asked, we must increase the number of people we are asking.

This brings us to the logical question: Whom are we missing? One answer is suggested by the Independent Sector's research. They identify the "underasked" as young people and people of color. Furthermore, they find that when these "underasked" are asked, 78% respond. This is a higher percentage than the percentage of givers in the population at large (thought to be about 70%). Since giving and volunteering are habits often developed when young, if we continue to underask young people, we can expect a continuing decline in contributions in the future.

Reversing the Trend

How can we make sure to reverse this trend of focusing our asking on affluent households and not asking millions of people who might give?

First, start your fundraising with people you know. Don't focus on posh neighborhoods, major donors to other groups, or rumors about how many millionaires are setting up family foundations.

I was recently with a wonderful organization in Oregon that had been grappling with this issue for more than a year. A member of the fundraising committee had carefully researched and compiled a list of about 200 business people in town who gave money to various causes. Here's an example of her excellent research:

- Joe Smith, owner of three hardware franchises, Chair of Rotary and active in the Chamber of Commerce. Gifts include \$300 to his child's school foundation, \$250 plus hardware to a homeless shelter in town, \$500 to his alma mater.
- Mary Jones, vice president of a local bank, active in her church and in Rotary, \$500 to a battered women's program, \$500 to the local symphony orchestra, and a large amount (exact amount unobtainable) to Habitat for Humanity's building program through her church.

And so on, times 200 names.

All this research had taken about a year. The volunteer who had done it had pored over program books, newsletters, social pages of the newspaper. All of the information was derived from public sources. Once the research was completed, the committee had decided to approach each person individually and divided up the names among themselves. Of the 200 names, 25 were people known to

one or more committee members, and those people had been asked. Half had given and half had declined to give. Those who had given had been asked for introductions to others on the list, yielding introductions to about 20 more on the list.

The remaining people whom no one on the committee knew personally had not been asked, despite the committee's intentions and deadlines set for themselves. In fact, five meetings had transpired at which the names were divided up and assigned or reassigned, only to be followed by another meeting at which members reported that for the most part these prospects weren't being approached. To date, this process had taken two years — one for the research and one for the follow-up, or lack of it.

In frustration, the group asked me what they should do to motivate themselves to approach the rest of the names on the list. The volunteer who had done the research was understandably peeved that so little had been done with her efforts, although she too admitted that she had not approached any of her designated prospects.

Clearly, this committee should give up approaching people they don't know. The research will be helpful when they finally meet some of these people through their known contacts. In the meantime, I suggested that each committee member make a list of 15 people they knew and ask them for donations. I saw looks of relief on many faces: "It would be a lot faster for me to ask people I know," said one young woman. And another added, "If I ask 10 friends and only get \$20 each, I'll still have more than I was able to raise from one of these contacts." Then the horror chorus started: "But these are the most prestigious people in town. These are the movers and shakers. We can't ignore them." I pointed out that I wasn't suggesting ignoring them. "I am suggesting that you start with who you know; these are much more likely to be the movers and shakers for your group. Then you can see who these people know."

Finally, the chair suggested a compromise. All those who wanted to ask people they know should compile a list of these people and bring it to the next meeting so that the group could guarantee that no one was being asked more than once. Those who wanted to keep working from the list of 200 could do so. Of 13 committee members, 11 decided to ask people they know and two decided to work the list. Ironically, the volunteer who did the original research was one of the eleven who decided to ask people she knew.

Six months later, 8 of the 11 people who agreed to ask people they know have done so, resulting in 70 new gifts and \$1900 raised. The two who are plugging away on the original list have asked three more people and raised \$750 from two of them. The other three members of the committee have compiled their lists, but not quite gotten around to asking.

This is excellent progress.

When you start with people you know, start with the person you know best — yourself. Make a gift that feels good to you and then ask your friends for a gift in that range. Much time is lost trying to determine how much to ask people for. The most important thing is to have them feel good about their gift, should they choose to give. A person will feel good about the size of his or her gift if the gift is comparable to the gift given by their friend. Some people may give more and some may give less. You may feel comfortable asking people with considerably more resources for a gift larger than the one you gave, and you probably want to scale back your request when approaching people who have considerably less than you do. Using yourself as a benchmark will save a lot of time. Once a person has given, their gift becomes the benchmark to start the process of asking for more.

If all of us involved in fundraising ask people we know, we probably won't leave out the millions of households that went unasked in 1995. However, if our circles of acquaintances are not diverse, we may have a large segment of potential supporters whom no one in our group knows and who don't get asked by us. Therefore, it behooves us to make sure that our boards of directors and our staff and volunteers represent the broadest range of demographic possibilities of our communities.

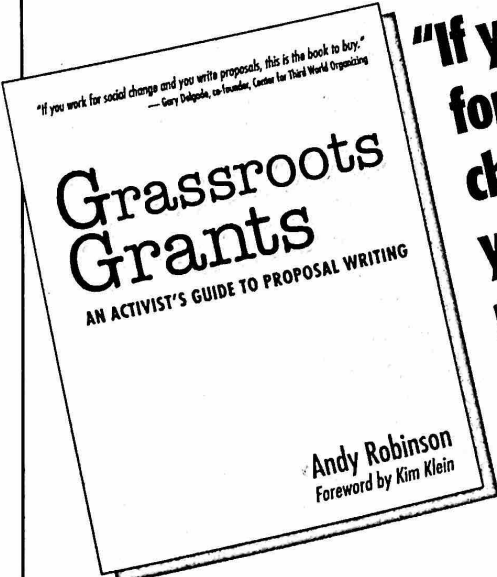
A final point — make sure everyone in the organization knows how to raise money — staff, volunteers, board, everyone. Any time you notice the faintest enthusiasm about fundraising from a client, a staff person, the janitor

of your building, or whoever, bring them on your fundraising committee.

Here is an example: A group was planning its 20th Anniversary Celebration. The committee was meeting at the home of a board member, whose 16-year-old daughter was eavesdropping on the committee meeting. At one point she piped up, "I have an idea for how you can raise even more money." Committee members smiled and her mother said, "Good — why don't you tell me later." Looking puzzled, the girl left the room. A few minutes later, one of the committee members passed the girl's bedroom on her way back from the bathroom. On a whim, she said, "What's your idea of how we can make more money?" The teenager said, "A lot of people coming to your event will have to hire babysitters. I can organize a group of my friends and offer free babysitting at the event, and people can contribute what they would have paid for sitters to the organization. It will be much more fun for the little kids and will let me and my friends help." This was a good idea that resulted in an extra \$600 being given to the event, and a bunch of 16-year-olds whose ideas will not be so easily overlooked next time.

I have been raising money for 20 years, since I was 23. One of the obligations I feel is to bring in people who were my age when I started, so that when I am 63, there will be some 40-somethings to carry the work forward.

We have too much money to raise to be able to afford to lose even one household's giving, particularly over something so correctable as that they just needed to be asked. **GFJ**



Grassroots Grants
AN ACTIVIST'S GUIDE TO PROPOSAL WRITING

Andy Robinson
Foreword by Kim Klein

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STRATEGIC PLANNING: *When Aren't You Ready?*

by Karen Simmons

At LaSalle's Nonprofit Management Development Center in Philadelphia, we provide customized, intensive technical assistance to more than 200 small- and mid-sized nonprofits each year, mainly in strategic planning, board development, and fund development. Many of our contacts start with a phone call from a nonprofit's executive director who says, "Grantmaker XYZ says that we need a long-range, comprehensive strategic plan before they'll consider funding us any more, and they'll pay for it. Will you do it?" Others are prompted by board concerns: "My board says we need a strategic plan because they don't have a good handle on what's going on around here. Can you come in and give them a clue with a planning process?" A third request is, "My board meddles in my business all the time; they constantly second-guess me and look over my shoulder. Can you come in and set them straight by getting a plan on paper?"

To all these callers, we first define strategic organizational planning, by which we mean a comprehensive process in which board, staff, key volunteers and constituents do the following: 1) review and sometimes renew their mission; 2) take stock of what's going on inside and outside the nonprofit and assess the nonprofit's strengths and vulnerabilities; 3) prioritize a few focused organizational initiatives; and 4) delineate specific goals, strategies, action steps, timelines and responsibilities. Some nonprofits can do this kind of planning in a day; others need a whole year.

In many cases, a strategic planning process can definitely help a nonprofit become a stronger, better focused organization. But every once in a while, the nonprofit isn't ready for a strategic plan. There are other things going on that they might think can be solved with a strategic plan, but it just isn't so.

When Can Planning Help?

1. When a team wants to renew itself. When done right, a planning process can lift the morale of your board, staff, and volunteers. It brings your team together to renew their commitment to the cause. This is especially useful after

your board, staff, and volunteers have been through a major organizational crisis and have recovered enough to seek some sort of positive shared experience to renew their sense of team unity and clarify the direction in which they're heading. Also, if you're a new executive director or board chair you may find it useful to undertake strategic planning as a way to shift your nonprofit's direction, or raise the collective morale during the first weeks or months of your tenure.

2. When an organization wants to focus. Sometimes, people just need to put all the clutter and clatter aside and regain focus. Planning is a great way to harness people's energy! It's revitalizing to get together and discuss long-term organizational priorities and refocus organizational initiatives.

When Is Comprehensive, Long-term Strategic Planning Relatively Useless?

Sometimes, a nonprofit organization isn't really ready for a comprehensive planning process. When we as consultants have tried to forge ahead and orchestrate a strategic planning process with nonprofits that aren't ready, we find that it's not merely unpleasant—it's also relatively useless. Over the years, we have learned that if (and that's a big "if") we can even get to the stage where we can put a plan down on paper, that document will be fought over word by word. We also know full well that the plan will sit on a shelf, and be blasted as "totally useless" by current and future board and staff members.

If you're a nonprofit undertaking or thinking of undertaking a planning process and you feel constant blockades and infighting along the way, it's probably because at least one of the following situations exists.

1. The Board and Executive Director dislike each other to a point of serious mistrust. Sometimes, nonprofits believe that if they can "just write everything down" then the board will stop meddling in staff's business and the executive director will "just do everything we want her to do." This is a warning signal for a consultant. In too many cases, this compulsion to write every detail comes from having a high

level of distrust and lack of confidence between the board and the executive director.

Instead of undertaking a planning process, in many cases this is the point where your board members have to hunker down and do the work they dislike the most: appraising the executive director's performance in relation to some agreed-upon goals and job descriptions. If the majority of the board agrees that the executive director's output is, indeed, satisfactory, then all board members must support the director fully. Sometimes this is not possible, and board members have to be asked to resign—not an easy situation. In other cases, the executive director realizes she or he must leave. It's even more painful when executive directors don't face the music, and the board asks for their resignation and/or fires them. Although these painful actions cause a great amount of upheaval, in the end the organization finds itself at a much healthier, clearer place, ready to mobilize forces and move ahead.

2. Board members can't agree because they don't trust each other. In other cases, the board members themselves have such high levels of distrust for each other that every decision becomes a major one, and most decisions are reversed time and time again. This constant rehashing becomes incredibly irritating and frustrating. If the board can't even decide what should be on the meeting agenda or who can represent an issue, how is it to agree upon the organizational initiatives and priorities for the next 3 to 5 years?

Sometimes there is no hope for boards like this, especially if the board is drawn from a pretty homogeneous community. Diverse boards seem to arrive at better, stronger decisions than non-diverse boards. By diversity, we mean diversity of all kinds: age, income levels, color, ethnic background, sexual preference, job affiliations, user and non-user of your services and other differences that you can think of.

3. "Isms" get in the way. However, with diversity can come phobias and "isms," that is, intolerance for people of different backgrounds. These attitudes must be resolved before undertaking planning.

Racism, sexism, homophobia, classism, and ageism are the intolerant attitudes nonprofits face most often. Classism sometimes takes the form of a rift between wealthy board members and underpaid staff; the situation is exacerbated when the same board members believe the staff's work is substandard and needs to be intensely scrutinized. Other times a rift exists between the nonprofit and the neighborhood in which it is situated. Diversity trainers and linguist coaches are invaluable here, so that individuals can open their eyes to their prejudices, stereotypes and verbal and nonverbal "baggage." Sometimes diversity training helps, but there are cases in which people can't stick with it

because the situation is too painful. Obviously, comprehensive organizational strategic planning is *not* what's needed here yet, but it's an easy "tool" to hide behind to avoid dealing with the real issues.

4. The nonprofit is financially out of control. This is a "chicken and egg" sort of situation. If a nonprofit is severely underfunded or spending its funds unwisely and consistently can't make payroll, it is unlikely to have the time (nor will board and staff have the patience) to undertake a strategic planning process to get at the core issues. Even a quick long-range strategic planning effort often winds up with board and staff getting too frustrated, as their thinking is clouded by the emergencies at hand.

Often a temporary quick fix is needed here, so that board and staff can begin to think straight. This usually means making a final round of expense cuts and staff layoffs and getting board members mobilized to do some stop-gap fundraising, such as phone-a-thons and individual solicitations. Then, when the nonprofit hits a level where people feel they can breathe for a while, you can dive into an efficient strategic planning process and seriously consider merger, collaborations, spin offs, narrowing the program focus, and shutting down the organization.

Why Plan Anyway?

For many nonprofits, strategic planning is an incredibly useful process. The focus, clarity, and team building that the process requires make it worthwhile. But like any tool, it must be used for the right purpose. This article is not meant to discourage nonprofits from planning, but rather to point out that there are instances where other things have to be resolved first. If you do that, then strategic planning will have the chance to take hold deeply enough to do the valuable things it is intended to do. **GFJ**

Karen Simmons does long-range strategic planning and other consultation to nonprofits through the LaSalle Nonprofit Management Development Center in Philadelphia.

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Profile of a Major Donor

by Kim Klein

The word "stewardship" is not used very widely anymore outside of environmental and religious contexts, although many of us in fundraising also use it from time to time. A steward is one who is entrusted with the management of property, finances or affairs not his or her own. Theologically, and in certain environmental circles, there is the belief that nothing really belongs to us, that we are obligated to take care of everything on Earth as though we were administrators rather than owners. In fundraising, good stewardship means taking care that money donated to a cause is used for that cause, and is used wisely. A stewardship program in fundraising means promoting thoughtful giving among a group of people; it is usually used in the context of a religious congregation.

The following story comes out of a religious setting, a Catholic church. This is a profile of a major donor, Ben Agustin, but it is also a story of his work in his church to promote stewardship and the benefits to the church of a stewardship program.

This interview with Deacon Ben Agustin, Pastoral Associate at St. Joseph's Church in Pinole, California, was conducted by Suzie Fitzpatrick, Associate Development Director with Catholic Charities in Oakland. It is reprinted from their newsletter, *Stewardship News*, and used with permission of Catholic Charities.

Q. How does the stewardship program at St. Joseph's work?

Deacon Ben: We are simply asking every family to make a weekly gift that says, "Thank you, Lord, for the many blessings you have bestowed on us." ...In the Old Testament, there is a quotation that I think explains the concept very well. In Sirach 35: 8-10, it says, "With each contribution show a cheerful countenance, and pay your tithes in a spirit of joy. Give to the Most High as God has given you, generously, according to your means. For the Lord is one who always repays, and God will give back to you sevenfold."

Q. How did you get involved in stewardship?

Deacon Ben: My wife and I...both work and have to deal with expenses and bills just as you do. Although we have

always given to charities, it was not until 1990 that we made a real commitment to tithe on a monthly basis.

I was working in the heart of San Francisco's financial district at the time. Each day, as I emerged from the [public transit] station, my heart went out to the many homeless people I saw huddled along the streets. As time passed and the recession deepened, the number of unemployed and homeless calling out for help grew in number.

Feeling the urge to offer concrete physical and emotional help, my wife and I began working with our prayer group to feed the hungry at a local soup kitchen. We discovered a profound sense of peace and joy in helping the hundreds of men, women and children who frequented that shelter. That experience broke down any remaining resistance that kept us from making a commitment to give regularly. We began donating 5% of our income.

In May of 1994, I was offered a full scholarship to pursue graduate theological studies. I saw this as a sign from God. God was giving me an answer to a long-held dream and asking us both to put aside the doubts and fears that we had about how we would make ends meet. After a month of prayerful reflection, we decided to trust in the Lord to see to it that our needs would be met. I quit my job and began my two-year course of study as we lived off my wife's income and our savings. Then, at the end of 1994, I was assigned by the Bishop to continue my service at St. Joseph's as a Deacon, and I was also given the wonderful opportunity to serve as the pastoral associate.

We had trusted God and God took care of us. In grateful recognition of all that God had done in our lives, my wife and I decided to raise our tithe to 10% of our gross income.

It is not always easy. We have had to change some of our priorities. However, we now experience a peace and joy in our lives that makes us wonder why we never made such a weekly sacrificial offering before!

Q. How much do you ask your parishioners to give?

Deacon Ben: That's an unanswerable question. However, the concept of stewardship or tithing is not new. The term tithe means one-tenth, and the Bible states that we should give

back to the Lord 10% of the fruits of our labors. But more important to us is the spirit of sacrifice associated with our giving rather than the actual percentage. It varies with each person. What is a sacrifice for one person may be easy for another, what is a small amount for you may be an enormous gift for me.

The Biblical concept of tithing means that out of every dollar that we earn, we should give back to God 10 pennies. We suggest each family give the first five pennies directly to support our parish, and the the other five pennies be offered to the poor of the world through the Bishop's Annual Appeal, a favorite local charity, the Campaign for Human Development, etc. The other 90 pennies of each dollars are ours to spend for our own needs, comforts and pleasures....

Q. Are you starting to see the fruits of your efforts working at St. Joseph's?

Deacon Ben: Yes! The plate collections have increased 34%! It is interesting to note that in no place in the Bible will you read about fundraising bazaars and festivals, spaghetti suppers, or bingo as a means of support for the parish. These activities are great as socials and for building a sense of community. However, they need not be a means of critical financial support for the parish if every family practices stewardship throughout the years.

While stewardship may seem purely a financial or monetary concept, let me reassure you that it is much deeper and affects not only our daily lives, but also our spiritual foundations. I see that happening here! In fact, many people have come to me and said that they have reaped benefits they did not expect. They have a great peace at heart, a sense of satisfaction, and assurance that God's work is being done! **GFJ**

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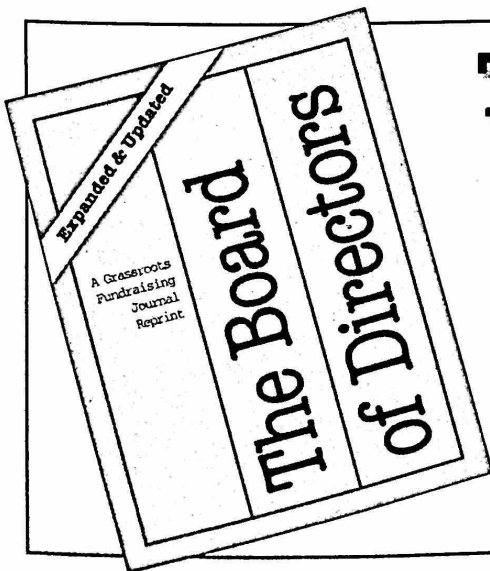


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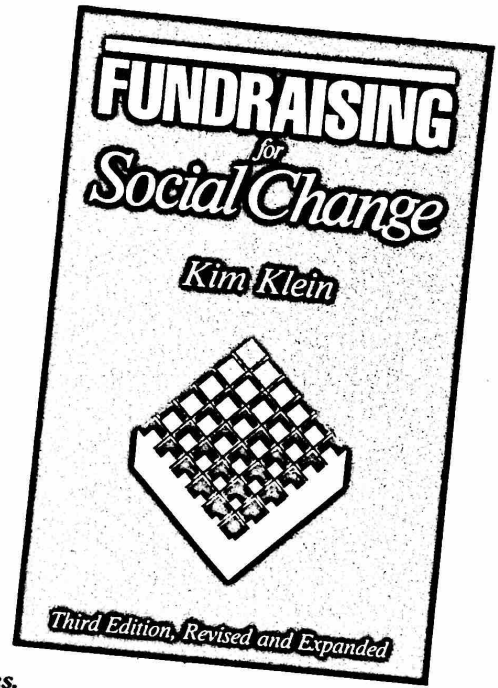
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