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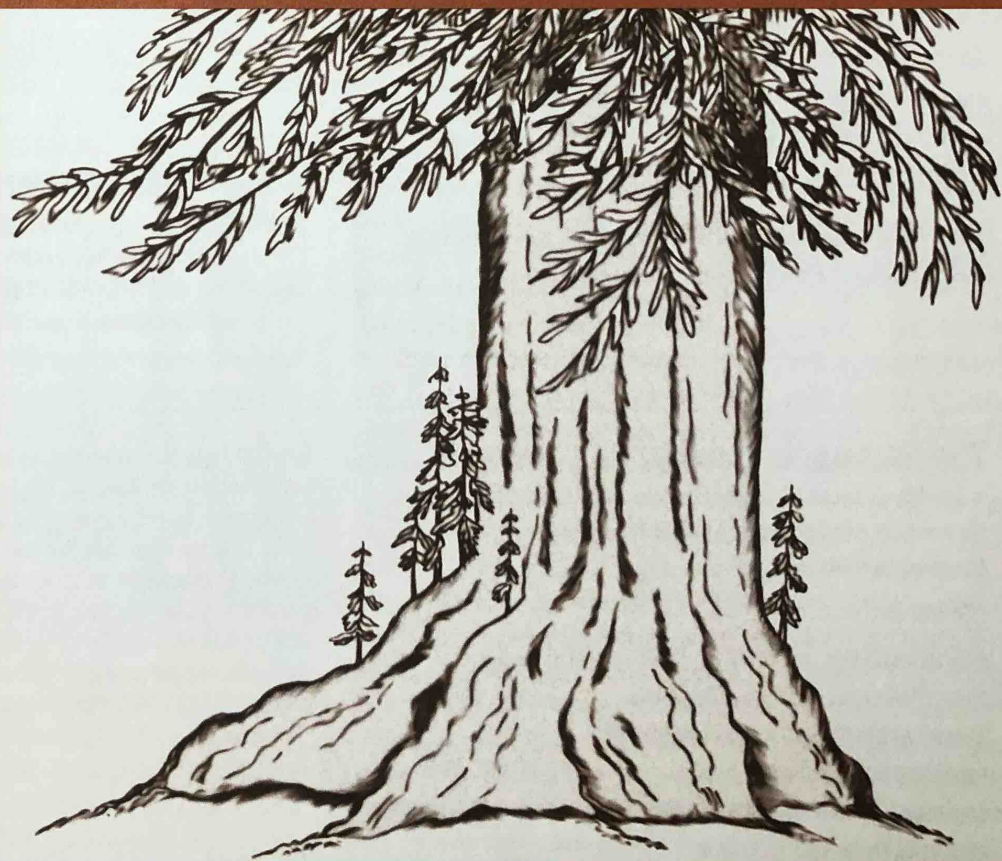
Grassroots Fundraising Journal

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**Asking in the Age
of the Machine:
The Electronic Moat**

**Selling Social Change:
Earn Money from
Your Mission**

**Stopping
Income Leaks**



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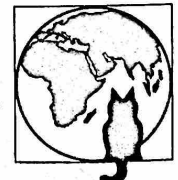
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Asking in the Age of the Machine:

How to Deal with the Electronic Moat

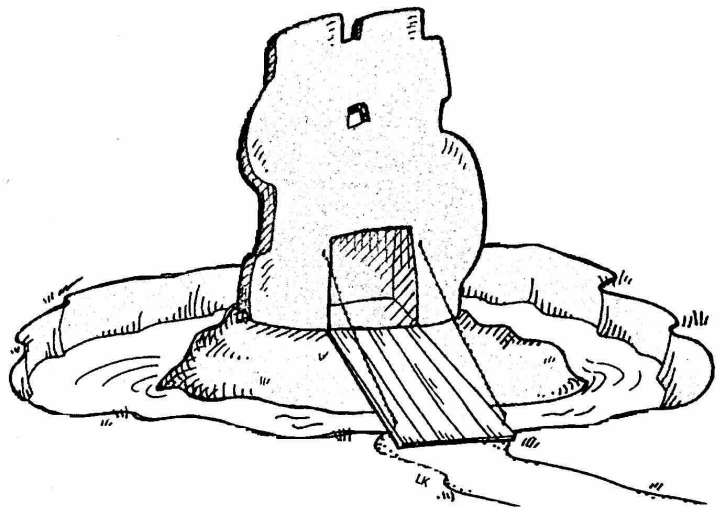
by Kim Klein

It's hard enough just to make the call. Whether you are new to personal solicitation or a veteran with dozens of "asks" under your belt, you probably spend a fair amount of time preparing to work your way through your list of calls.

First, you have to decide whom to call, and what to ask for. Depending on the size of your donor base and the number of people available to make these calls, I recommend calling people who have given at least \$100, and whom you want to ask for more money. You may also call people who have given \$100 or more simply to ask them to renew at the same amount, if you believe the person has reached their capacity or if they have recently increased the size of their gift. However, it takes so much energy to call that, unless your information indicates otherwise, it is best to use the call to ask for more money. Of course, you can also use phone calls to ask donors to host a houseparty or to recommend other people who might become donors.

Your data base needs to be able to list people who have given *frequently* over a long period of time (three or more years); people who have given *significantly* (the exact size of "significant" varies from group to group) at least once; and people whose giving is *increasing* without being asked. These are the people to concentrate on. Another group not to be overlooked is people who have given a major gift then decreased their giving. You need to find out if their decrease has anything to do with you.

Now, to the phone. You take out your 3-by-5 card or computer-generated form with the information about the person that you are calling. You review his or her giving history and the gift you are to seek. You recall what you know about this person—is she garrulous or brusque? Is he likely to be receptive to your call or will he resist? You review what you are trying to do with the phone call—get a meeting, get the money on the phone, set up another phone date, etc. If you are like me, you make some notes about what you want to say and you review how to answer objections that may be raised. You take a deep breath, wish your-



self luck and call.

Ring, ring. Until the last ten years or so, if you were calling someone at home, you either reached a person or the phone kept ringing. If you called the person at work, you might have encountered a secretary or receptionist of varying degrees of friendliness. In that case, you had to decide what kind of message to leave, particularly in response to the slightly hostile question, "Will she know what this is regarding?" or the even more haughty, "Will she know who you are?" As you left your name and tried to summarize in 10 words what you wanted, you kicked yourself for not preparing more thoroughly for such an encounter.

For the last decade or more, you would have prepared yourself not only to speak to the prospect, but also to leave a message on an answering machine if the prospect wasn't home. In leaving the message, you would have had to decide how reliable the machine sounded. Did it have that underwater quality that indicated your voice would be too distorted to be understood? Did the tape run out without warning mid-message, leaving you feeling really foolish? Did it make weird clicking and blipping noises that caused you to keep stumbling over your words, unsure which were being recorded? Veterans of calling got used to all that.

But in the last two years, message machines have gotten more complicated. Now you may be confronted by a menu of choices that requires pen and paper just to keep track of, let alone select from. "Hello, you have reached the Smith family. We are either on the phone or not available to take your call right now. If you know whom you want to talk to, you may press the number at any time. For Kevin, press one, for Moira, 2, for Shelley, 3, for Alfred 4." Beep. Now, your dilemma, which must be resolved in one nanosecond: you want a meeting with Kevin and Moira, which box do you leave that in?

Or, you call the prospect at work. First you are routed electronically to a staff directory. You can enter the first three letters of their last name. Someone else has the first

three letters of your prospect's last name, and you are put into the wrong box. You call back and press zero for an operator. There is no operator, but you can get to another directory that gives everyone's name at the office, along with the code you must use to reach them. "For Mary Jones, press 157 followed by the pound sign." Everyone, we hope, knows which is the pound sign by now.

If a live person answers the phone, his or her job is mostly to put you through to voice mail. Forget getting anyone who can tell you whether the person you want to reach is out to lunch or on sabbatical! At the voice mailbox, some people are very nice about leaving an outgoing message that describes their whereabouts; "I'll be out of my office today, and back tomorrow," which would help except you don't know which day is "today" and which "tomorrow."

To be sure, what I have just said applies to a particular demographic profile of donor: people ages 25-60 who have jobs. Organizations that have a high number of retired people among their donors will not have the experiences I am describing. Similarly, what I am describing is more true in urban areas than in rural ones and in big cities than small towns. But for many groups, the majority of their donors match this demographic profile.

Now another complication has arisen: an increasing number of people prefer to be reached by e-mail or fax. Although they are not unwilling to engage in a conversation, you may never have one with them. A friend of mine recently concluded a \$5,000 request successfully all by e-mail. It took three days and 6 messages, but she says it actually took very little time.

So, for the phone call you make today, your chances of actually getting your prospect on the phone the first time you call are down to almost zero, and your chances of ever speaking to them in person at all (unless they are also a good friend) are down to about 20%!

Everyone Is on the Phone

A second and related problem is the degree to which raising money by phone has become seemingly universal. Whether it is commercial telemarketers making "cold" calls to sell everything from long distance phone service to credit cards to mortgages, or nonprofits promoting a cause that will save, prevent, promote, stop something bad or start something good, the phone is suddenly the chosen first method of contact. The fax machine is not far behind, and unsolicited advertising over e-mail is already beginning.

Even though people find phone solicitation annoying, it does work, as attested to by the income generated. A study commissioned by the Direct Marketing Association showed that some \$65 billion was raised last year by nonprofits through telemarketing. Compare that to giving by foundations of \$11.8 billion and you have an idea of the impact of the strategy. Telemarketing is not likely to go

away any time soon.

It's no wonder that many people are choosing to surround themselves with gatekeepers: machines that screen messages and allow many calls to go unanswered. I call this the "electronic moat." So, from now on and as far into the future as we can see, it is clear that as fundraisers we need to spend less time psyching ourselves up to talk to the prospect and more time preparing to talk to the various electronic voices that inform the prospect what is wanted of them.

The Personal Touch

Along with total strangers calling asking you to join groups you do not currently belong to, many nonprofit groups are trying harder to approach current donors more personally. I endorse this, and many articles in the *Journal* have talked about how to do this. However, this strategy is losing effectiveness because it is being overused.

In my own experience, in 1997 I got dozens of personal notes attached to letters asking me for money. While many of these notes were from people I had met briefly, they were often from people I did not know. Many of these personal notes were followed up with phone calls—very nice messages asking me to give again or give more. In talking with friends, I learned this personalizing was extremely common. The problem with it is that as it becomes more common, it becomes less effective.

So, what are some solutions? First, I reaffirm that any personal note or phone call is more effective than none. That it is less effective than it used to be does not for a minute mean it is not way more effective than an impersonal letter with no follow-up message.

However, many people engaged in personal solicitation have lost sight of the meaning of the word "Personal." As Funk and Wagnalls reminds us, personal means "pertaining to or concerning a particular person, not general or public." The key word here is "particular" person. We need to be increasingly conscious of trying to match solicitors with prospects whom they know personally.

For many years, the connection between prospect and solicitor could be simply that they were both donors to the same group. Many of us have made successful calls to people by introducing ourselves as Board members or volunteers and saying, "We don't know each other, but we both give to Verygood Group, and I'm hoping I could talk with you about renewing your gift." While this can still work, it doesn't fly as well as "Hi, George, this is Mary. Will you call me when you have a chance? I want to talk with you about giving to Verygood Group. It was great to see you and Terry at New Year's. 444-8765. Thanks."

When deciding who will ask whom, make every effort to put people together who know each other socially or professionally. For many organizations, this means a larger pool of volunteers will be involved in asking for money.

The development director's job more and more involves getting as many people as possible out there asking, and maximizing the opportunity for people to ask particular people that they know.

Will They Open the Envelope?

That being said, there will still be many instances in which the relationship between prospect and solicitor is not close and true personal contact is not possible. In those cases, solicitors must think through how to leave short, interesting messages that are to the point.

Start by recalling that a person's attention span is 15 seconds at most. As someone sits at their desk or stands by their answering machine at home taking down messages, they listen to very little of what is said. "Who is it and what do they want?" is all they want to know. A person taking down messages wants to know your name, your number and briefly what the call is about. Thus, the message you leave on voice mail or a machine is comparable to the carrier envelope in direct mail. If the prospect doesn't open the envelope, he or she will not be responding to your mail appeal. If the prospect cannot be bothered to listen all the way through your rambling message, you probably won't get any further with this solicitation.

Here's a good message: "Hi, this is Con Cise. I'm on the board of the Food Bank, and I'm following up a letter I sent last week. I'd like to talk with you about the possibility of you increasing your already generous gift because we have a lot more people needing us, as you can imagine. If you have time to meet in person, that would be great. My number is (510) 543-1234 and I will be in my office all day Tuesday and Friday. I'll also try you later this week. Thanks."

Contrast: "Hi, this is Beata Roundthebush. Hope you are doing well and that you got my letter about the Food Bank. You probably don't remember meeting me, but I think I met you at our Open House. You know, there are a lot more hungry people this year than last. And we have to raise a lot more money this year. I would like to talk with you about that. Maybe we could meet for lunch and I could bring you up to date on all that has been happening. I'll keep trying you, or you feel like it, you can call me. My numbers are 876-9887 and 989-4432. OK, well that's it. I look forward to speaking with you soon. Take care, and I hope you are not snowed in."

Beata's message is definitely friendlier, but on an answering machine, friendly quickly becomes annoying. Con's message is terse, but if delivered in a friendly warm voice, would seem no less friendly than Beata's and would also seem more respectful of the prospect's time.

To Meet or Not to Meet?

Having figured out how to get the prospect's attention in your message, you have to decide what you're asking for.

In the old days, a few years ago, the phone call was the way to set up a meeting to ask for the gift. Now, many people are asking the prospect to make a phone date rather than to meet in person. For many busy people, a personal meeting just feels like it will take too much time, and in fact it is bound to take more time than a phone call. So the purpose of the initial phone call may become to set up another phone call, one in which you'll actually talk with the prospect and make the ask. This is particularly useful for donors in the \$100-\$500 range, who are as likely to agree to increase their gift over the phone as in person.

Here the message you leave goes like this: "Hi, this is Con Cise. I'd like to talk with you about your gift to the Food Bank this year. Could we set a phone date to do that? Tuesdays and Thursdays are good for me, as well as any evening or weekend. My number is 445-8897. I'll also try you later this week. Thanks."

Make It Work for You

Another somewhat effective solution to the electronic moat is to use it to your advantage. Tell the prospect that you have a phone-answering machine and he or she is welcome to leave messages anytime. Sometimes prospects will call when they are certain you are not there, and leave their response to your message. "Hi, Con. Thanks for calling. I'm not sure what else I can do for the Food Bank this year, but I will give what I gave last year." Then Con can leave a message saying, "Thanks so much for your message. That's very generous. I'll put you down for a renewal and send you a return envelope. Hope we will be able to talk in person one of these days." It is not unusual for gifts to be solicited and confirmed via machine. This same tactic can be used with donors who give you their e-mail address.

The biggest drawback to this reciprocal use of machinery is that it gives the solicitor little chance to persuade the prospect about the necessity and value of increasing their gift. On the other hand, I have heard of people negotiating an upgrade with prospects through a series of phone or e-mail messages. Again, if there is some familiarity between the solicitor and prospect, the chances of upgrading the gift, even without in-person communication, increase. For the most part, however, this strategy will result in a renewal rather than an increase in the gift.

I Still Love You

Solicitors often make the mistake of thinking that because a prospect doesn't want to talk with them, the prospect doesn't like them or their group. This is rarely the case—far more often, the prospect simply feels jammed for time. Perhaps they don't have any questions about your work. If the Food Bank is still feeding people, that's great. That there are many more people to be fed can be discerned

by walking down the street or reading the paper. If your group actually has a complicated or controversial issue, then the prospect may wish to talk with you because he or she can learn something. Even then, the prospect may request (by message of course) something in writing.

The Personal Thank You

The one type of personal contact there is still not enough of is thank yous. While many organizations use thoughtful, personal appeals to solicit money, whether in letters or phone calls, their thank you often comes in a form

letter, without even an extra note attached. This does not make for prospects who want to meet and talk in the future. They feel they are appreciated up until the time they give their money, and then not until they are asked again. Do not neglect that thank you-by phone and by mail—and make it personal!

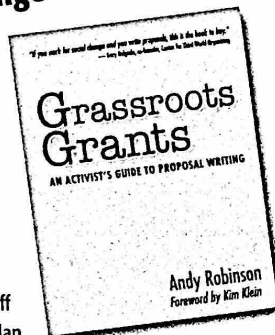
Time is our most precious non-renewable resource. With few exceptions, people feel as if they have too little of it and they must be very careful about giving it away. Working with that understanding allows you to work with the electronic voices, instead of resenting them. **GFJ**

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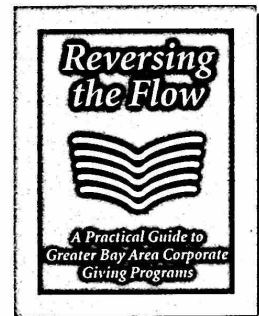
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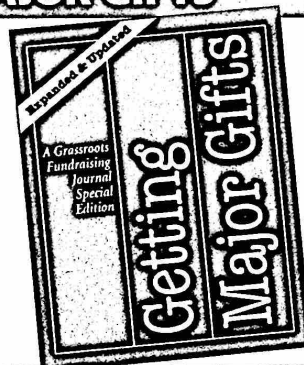
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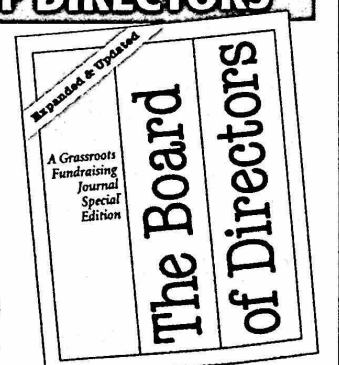
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Selling Social Change...

How to Earn Money from Your Mission

by Andy Robinson

I have a confession to make: I don't trust capitalism. In fact, I've spent most of my professional life dealing with the messes created or abetted by our market economy—poverty, inequity, militarism, and environmental troubles, to name a few. So what I'm about to write surprises even me.

Capitalism—at least the small-scale, neighborhood-grown variety—can be an instrument for social change. Dozens of progressive organizations across the country are developing and selling goods and services that support and extend their missions. Ironically, many of these groups are anti-capitalist—actively challenging the economic assumptions that drive our society—yet they have also found ways to earn significant income from sales. In doing so, they are discovering new strategies for educating their communities, activating their constituents, and expanding their budgets.

These nonprofits have gone way beyond t-shirts and coffee mugs, earning 10–40% of their revenue from mission-related sales. Some provide services: investment research, self-defense training, eco-tourism, curriculum development. Others publish books and reports about their issues and programs. Still others sell goods ranging from traditional garden seeds to music CDs. All products are designed to support organizational goals; the fact that they generate income is an added benefit.

Why Earned Income?

The reasons for creating and selling goods and services are as varied as the nonprofits that do it. Among the most important are the following:

1. Funding diversity. Having a broad and diverse funding base—especially money raised from your community—is the most effective way to ensure the survival and good health of your organization. Sales income can be an important part of the mix.

2. Expanding the donor base. Sales, like fundraising, is built on relationships. Customers are good prospects for additional donations because a) they know your work first-

hand, b) they believe in your mission, and c) they've already written a check to your group. The inverse is also true: with modest effort, members/donors can be converted to buyers, which means they write you several checks each year.

3. Less reliance on grants. Grants are problematic for at least three reasons. Foundations and corporations combined provide only 12% of the private-sector money given to U.S. charities, so groups that rely on funding from these sources are chasing a small piece of a very large pie. Furthermore, fewer than 15% of all proposals submitted are actually funded, which makes for lousy odds. Finally, grants are known as "soft money" because they are seldom renewable.

By developing a range of grassroots fundraising strategies, including earned income, nonprofits can have more control over their destiny, instead of relying on luck and the good will of grants officers. (Ironically, a diverse funding base makes it easier to get grants, since most grantmakers prefer to invest in successful groups with broad support.)

4. Publicity and advocacy opportunities. The creation of goods and services provides "handles" for promoting your cause, as well as your products. With creativity and persistence, you can get a lot of free publicity from the news media.

5. Skill building and leadership development. To do this work successfully, your group will need expertise in market research, graphic design, advertising, promotions, accounting, customer service—it's a long list. Since you need most of these skills anyway to run any sort of nonprofit, the process of developing and selling products can have a positive ripple effect throughout the organization. Along the way, you'll discover (or create) new opportunities to challenge, involve and train your staff, board, and key volunteers.

Danger: Rough Road Ahead

If this sounds too good to be true, it probably is. Here are five reasons that an earned-income strategy might not be appropriate for your organization.

1. Don't you have enough work already? Accountant and trainer Terry Miller, who has advised many organizations, is wary of most earned-income strategies. When clients consider what he calls "venturesome activities," he often counsels against it. "Nonprofits are rarely well enough managed to run their regular projects," he says. By adding more work, he contends, they tend to divert management time and energy away from their main programs. Because of the potential for overload and burnout, he concludes, "most groups are not good candidates to add any sort of business venture."

2. Mission creep. Do you know what happens when you start shifting your goals and programs to take advantage of funding opportunities? If you're not careful, the tail (the need for money) starts wagging the dog (your mission). While this problem is most evident in the search for grant money, it can also arise through the sales of goods and services.

3. Up-front costs. You've heard it before: you have to spend money to make money. If you don't have start-up capital, nothing happens. You might identify a grantmaker or major donor who will subsidize the venture—either as an outright gift or a "program-related investment," through which a limited number of foundations provide funds at a low interest rate—but the research and application process will take at least six months. After all the work and waiting, your odds of getting funded are not good.

4. Potential tax liability. Even tax-exempt charities are liable for federal taxes on net income from sales of items or other business ventures unrelated to their mission. It's known as the Unrelated Business Income Tax, or UBIT. State and local taxes are also added in many areas.

How can you determine what is "mission-related" and what isn't? Terry Miller offers a hypothetical example:

A nonprofit daycare center decides to publish and sell a babysitting guide, which includes educational games, tips on keeping kids entertained, food suggestions, emergency phone numbers, and so on. If the center's purpose, as outlined in its articles of incorporation and application for tax exemption, is to provide day care, net income from the babysitting guide would be taxable. If, on the other hand, the organizing documents include language about child care education for parents and other caregivers, the net proceeds would be related to the exempt purpose, and therefore not taxable.

When he raises this example, Miller says, "most organizations scurry back to look at their founding documents." In other words, the decision about what constitutes "mission-related" may have been inadvertently made by your organization's founders when they filed for incorporation. This decision cannot be easily amended by rewriting the mission statement—the IRS looks at the founding documents, not the latest version. To allow for future flexibility, creators of new organizations would be wise to use broad

language when defining the purpose of their groups.

5. Sometimes they lose money. Even the best ideas are not always profitable. Every earned-income strategy involves risk; how much risk can your organization handle? Stated another way, how much time and money can you afford to lose? Since both are precious, it pays to be cautious.

Now that you understand the pros and cons of earned income, let's see how this strategy works in practice.

Native Seeds/SEARCH

Native Seeds/SEARCH works to conserve the traditional crops, seeds, and farming methods that have sustained native peoples throughout the U.S. southwest and northern Mexico. The organization, with offices in Tucson and Albuquerque, manages a seed bank with 1800 crop varieties, including corn, beans, squash, chiles, sunflowers, melons, and gourds.

More than 250 varieties are offered for sale to gardeners, and free to Native Americans living in the region. Since many of these crops are rare or endangered, one of the organization's goals is to distribute them widely to ensure their survival. By selling seeds, they support and promote their mission.

Four seasonal catalogs, mailed to 22,000 households, also feature traditional Southwestern foods, gardening books, native crafts, regional cookbooks, and gift baskets. Mail-order income, combined with walk-in sales, accounted for 38% of the group's \$500,000 annual budget in 1996.

In deciding which items to include, executive director Angelo Joaquin, Jr., says, "If it helps indigenous farmers to stay on the land and keep farming, we should sell it." Joaquin, a member of the Tohono O'odham Nation, adds, "We educate the public about how native people think about life in this region. In that sense, we promote cultural diversity through the products we choose."

Distribution manager Junie Hostetler adds three more criteria: quality, sales potential, and origin. "We're about to offer soup mixes and dried tomatoes from San Juan Pueblo in New Mexico," she says. "Whenever we buy directly from a Native American community, we're helping to fulfill our mission."

Native Seeds/SEARCH runs a diabetes education program targeting Native Americans, who face an epidemic of the disease. This program promotes the consumption of nutritious desert foods, which historically protected local peoples from diabetes. Many of these foods—tepany beans, chia and psyllium seeds, nopalitos (cactus pads)—are offered through the catalog and discounted to Native Americans. Joaquin is most excited about the recent availability of mesquite meal—ground from the seeds and pods of the mesquite tree—which consumers have been requesting for years.

In 1996, Native Seeds/SEARCH served more than 4,000 customers. Thirty percent were members of the organization, paying annual dues of at least \$20 per year. By comparing sales receipts, it's evident that these people were also the most generous and committed: the average member/customer spent 60% more on purchases than the average non-member/customer. The organization encourages all shoppers to join through a special annual appeal. Last year, 10% were converted to members.

Over the next 3–5 years, Native Seeds/SEARCH plans to increase earned income to 50% of the organization's budget. Joaquin is banking on a new retail location in Tucson, which has exceeded projections during its first months of operation. He remains cautious about what goes into the store, however. "We could probably make a lot of money selling tourist-type things," he says, "but we're not driven by money. We have to convey respect for these seeds and the people who grow them. We are simply caretakers."

DataCenter

DataCenter, which is based in Oakland, California, provides tactical research services to community organizations, labor unions, investigative journalists, and others. The organization was founded in 1976 "to give activists a strategic advantage through the power of information," says managing director Ruth Bukowiecki. Today, 25% of its \$625,000 budget comes from client services fees, subscriptions, and other earned income; the balance is raised from donations and grants.

DataCenter services include customized research; a public access library; "current awareness" services to track press coverage of specific issues, people, or events; a computerized listing of plant closures and layoffs; Information Services Latin America (ISLA), a press reprint service covering developments in Latin America; and CultureWatch, a monthly newsletter profiling activities of the religious right wing. The organization serves about one thousand clients each year, including the American Civil Liberties Union, Greenpeace, Hotel Employees and Restaurant Employees International Union, and the Silicon Valley Toxics Coalition.

Unfortunately, many clients—especially grassroots groups—cannot afford research services, which cost \$85–\$140 per hour. So DataCenter offers a sliding-scale fee. While few nonprofits pay full rate, Bukowiecki says, "most pay something." To make up the difference, the organization aggressively seeks full-charge customers and solicits foundation grants for its pro bono program.

Immigration attorneys needing human rights documentation for their clients contract with DataCenter, which has a long history with Latin American issues and sources. Journalists often hire the organization for investigative research. An emerging customer base is socially responsible investment firms, which seek information on cor-

porate labor practices, minority hiring, human rights records, environmental policies, etc. For example, the California employee pension program recently hired DataCenter to review layoff announcements of companies in its stock portfolio.

Prospective customers—even those who can pay—have to meet the DataCenter profile before they are accepted. Says Bukowiecki, "We have turned down corporate clients who want marketing information on Latin America, such as Nike, because we don't agree with their practices."

To find new clients, and to keep tabs on the needs of social change groups, staff have begun traveling to conferences to lead research workshops. The group is building stronger ties to the labor movement—a big prospective client—and also working with foundations to identify grantee organizations that would benefit from research assistance.

One thing that Bukowiecki does not want is lots of coverage in the general-interest media. "If you're in the news daily," she warns, "95% of your calls will be inappropriate." She cites the example of students looking for help with their research papers. Her message: target your outreach to the customers you most want to serve. Everything else is wasted effort.

SouthWest Organizing Project

SouthWest Organizing Project, or SWOP, is a multi-racial community organization in Albuquerque. SWOP works to promote racial and gender equality, and social and economic justice, by promoting self-determination for disenfranchised communities.

The group is involved in a variety of issues: fighting corporate welfare, promoting fair pay and improved conditions for farmworkers, stopping toxic waste dumping in poor neighborhoods, and resisting Albuquerque's expansion into Native American sacred sites, to name a few.

As part of its community education strategy, SouthWest Organizing Project has an active publications program. Since 1991, SWOP has published *500 Years of Chicano History*, a 240-page book with 800 pictures. Their book builds on an earlier edition published in 1976 by the Chicano Communications Center. All told, more than 22,000 copies have been distributed.

To promote the book, SWOP mails flyers to school districts, individual teachers, and bilingual education associations. They sell directly to bookstores and distributors—Barnes & Noble, Borders, Baker & Taylor—and feature *500 Years* in their newsletter, "Voces Unidas," which has a circulation of 11,000 households. The group also offers an annual discount to encourage holiday gift buyers.

According to Louis Head, SWOP's development coordinator, Chicano youth are consistently good customers, which means the organization is reaching its number one target market. The organization put ordering information on the Internet to reach well-to-do progressives, Head says,

“but the biggest response came from Chicano students.”

SWOP also distributes an accompanying curriculum guide and an English-language video, *¡Viva La Causa! 500 Years of Chicano History*, with narration, archival footage, and lively music ranging from traditional *corridos* to rap. Three hundred copies of the “teaching packet”—book, curriculum guide, and video—have been sold at \$114 each. A Spanish-language version of the video will be available this fall. (This is a terrific example of how to augment successful products, and increase income, by creating new products that appeal to the same consumers.)

SouthWest Organizing Project also publishes *Intel Inside New Mexico: A Case Study of Environmental and Economic Injustice*. When it opened a plant in the Albuquerque area, Intel received large tax subsidies, permits to draw water from the local aquifer, streamlined air-emissions regulations and a host of other concessions in exchange for the promise of local jobs. This report documents SWOP’s long-running campaign to make the semiconductor manufacturer more accountable to the public.

The report is being purchased by government agencies, city councils, community organizations and socially responsible investors who are monitoring the high-tech industry in their own communities. “As the level of understanding about this industry starts to change,” says Head, “more and more people are asking for our materials.”

From all of its products, SWOP will earn \$40,000–\$45,000 from sales this year, or 15% of its budget. “People who understand the funding diversity issue,” says Head, “get excited when we tell them about our sales income.”

Can It Work for Your Group?

There you have it: the promise, the pitfalls, and three successful examples. If you’re ready to explore potential earned-income strategies for your organization, you’ll need to do some basic market research. Consider the following points.

- 1. What do you now offer**—products, services, expertise—that someone might buy? Would any current clients—people or organizations you serve for free—be willing to pay for your work? If so, how much would they pay? How can you best convert them from clients to customers? How will you identify and recruit new customers?
- 2. What’s your niche**—how is your work unique? How can you differentiate your products and/or services from others that are also available?
- 3. What resources**—time, money, skills—can you apply to developing and marketing your goods and services? How much will this effort cost, and when will you need the money? How will you develop and/or hire the skills you lack? How much time and money can you afford to spend before your earned-income strategies actually earn income?

4. How will your proposed activities affect your tax status and tax liability?

5. Who are your role models? Which organizations in your field or your community generate earned income, and how do they do it? Which groups have tried and failed? What can you learn from their experiences?

6. Any other potential obstacles? How will you anticipate and address these problems?

If you’re baffled by any of these questions, you would be wise to back off, reevaluate, conduct more research, redesign, or perhaps abandon your earned-income fantasies. On the other hand, if you can answer them all with confidence, you might be ready to launch your new venture. Good luck! **G.F.J.**

Andy Robinson is a trainer and consultant in Tucson, Arizona. His book, Grassroots Grants: An Activist’s Guide to Proposal Writing, is available from Chardon Press (order on page 15). He is working on a new book about earned-income strategies for social change organizations. An earlier version of this article appeared in Advancing Philanthropy.

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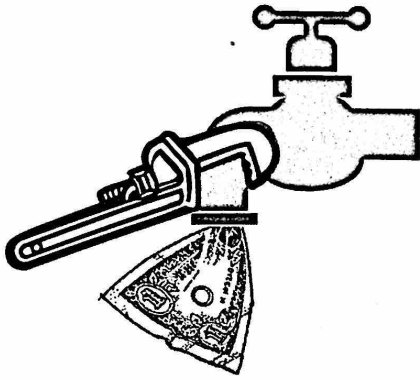
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Stopping *Income Leaks*

by Beth Raps

In the last few years of fundraising consulting to small and medium-sized grassroots organizations, I've noticed more and more ways my clients could be saving money. In fact, I've noticed that my clients might not need me at all if they tried some basic money-saving ideas. Sometimes I feel like saying, "Show me your budget and I'll tell you what your mission is." Though that's a bit bald, it does seem to me that where you put your budget shows where your mouth is. As a consultant, my job is to help amplify my clients' "mouth," their voices. This often demands not just fundraising, but re-examining fund spending.

Leaks of Omission vs. Leaks of Commission

With due apologies to the Church, the simplest way to start looking for income leaks is to think in terms of what Catholics call "sins of commission" and "sins of omission." What are you doing that results in money lost? What are you not doing that results in money lost?

Let's start with commission leaks because these are often easier to see. Once you begin seeing what you are doing, it's easier to see what you aren't doing.

Leaks of Commission

These leaks occur when you give something valuable away for free or for far too little: paid staff time, specialized knowledge in the form of information based on your experience or expertise, use of space, services, products, etc.

For example, an organization produces a publication but doesn't pass its true costs on in their price for the publication. They subsidize not just paid staff hours needed to produce it, but even the printing and the postage! Or they send out copies of a report to anyone who requests it—for free.

Or an organization spends not just hours, but what eventually amounts to days on the phone helping urgently needy people find services they need or responding to questions from organizations who are doing similar work, but never asks for anything in return—not a donation, not a

pledge, not a membership, not a subscription, not an advertisement in a newsletter, not an in-kind donation in return, not even a newsletter exchange!

I see two potential objections to what I'm suggesting, two reasons these decisions are not questioned more often. The first comes from the external debate in society contesting nonprofits' rights to tax exemptions and other benefits, including decreased postal rates, if we start "acting like businesses." The second is internal. It comes from our feeling that we are here to serve—whether it's those who don't have enough money to pay for our services, products, information, etc. or those who are colleagues or peers in the struggle.

First, the external objection—acting like businesses. If valuing our work is "acting like a business," then I contend that business metaphors are being allowed to control our minds. Businesses exist to make profits; we exist to fulfill our missions. We cannot fulfill them if we are less than extremely creative about how we spend and raise money. I am not suggesting making a profit on what we do. I am suggesting organizations deal with the real costs involved in doing what we do, and who should pay them.

We have no problem asking people to give us money to help us continue to do what we do that is valuable. This we call fundraising. But what we must realize is that it is also all right to pass the costs of what we offer on to the people who want it. One way is to consider asking for a gift, a pledge, a membership, etc. whenever you are asked to give something away—in short, use the request for information, publications, or staff time as an opportunity to fundraise.

Now for the internal objection, that we serve people with little or no money. How can we in good conscience ask them to support us? We can't. But think again about the rationales we use when we fundraise from those we don't serve directly. You've begun thinking along these lines already if your organization has approached donors or board members who were not among the people you serve directly. These people have another kind of stake in what we are doing—they want to see our services continue because

they believe that the problems we are trying to solve need attention. This is the way you build allies and develop the power base you will need to become ever stronger.

So perhaps there is an opportunity to broaden your base of support even beyond those you have traditionally gone to. To do so, you may need help figuring out 1) what you offer of value to others beyond your direct constituents; 2) who these "others" are; and 3) what to ask of them in exchange for what they receive.

Take a thoughtful and creative pause from your day-to-day work. Invite several people from your organization, including a combination of staff, volunteers, and board members, to a meeting with someone who does marketing, preferably someone who believes in what you do. Ask this person to structure the meeting to help you see what you already offer that would be or is of value to new constituencies. Notice that I am not suggesting you institute any new program, or produce any new thing to sell to these new people.

You can also team up with another nonprofit who knows your organization well, respects your work, and whose work you respect. Trade times in which you identify what your organization offers of value and what theirs does. Then talk about who else might benefit or does benefit from it beyond the people you are now serving if those you're serving have no or little money.

The third way to do this is simply to notice who asks for and uses what you offer beyond your direct constituents. Ask staff and volunteers to keep logs of how they use their time. If you are like some folks in my experience, you may be chagrined to find you are giving away time and stuff to people and organizations who could easily afford to pay or contribute to you for it! In fact, you may decide you're not serving enough of the folks you really meant to, and refocus your work accordingly.

Leaks of Omission

Once we understand commission leaks, leaks of omission look very similar. Where committing an income leak means actively giving something away for free or too little, omitting an income leak is simply more passively failing to question an expense. For example, what about that new Web site? or that board meeting expenses line item you've never asked board members to contribute to covering?

Looking more closely, ask why do you have a Web site? Who are you trying to reach? Who are you reaching? How do you know? What is the response rate, and what is the response? Are you getting the responses you want? Refuse to be snowed by technophilic arguments that amount to keeping up with the virtual Joneses. A targeted outreach approach often builds your organization better than a scatter-shot one.

What about board meeting expenses? If you have a class-diverse board, what keeps you from asking board

members to contribute as much as each is able to travel, food, and lodging for meetings? This means acknowledging that different members have different abilities to pay. If this is new, you want to go about it carefully; it is even more delicate politically than looking critically at the Internet, if such a thing were possible.

For other leaks of omission, hold a staff/volunteer brainstorming session in which people feel free to question the expenses side of your annual budget. (This assumes that everyone in your organization a) has a copy of your budget, b) can read it, and c) feels safe questioning it. If these factors are not true, attend to them immediately.) You may be surprised at your own collective creativity in locating income leaks of omission.

In the second phase of this process, bring a list of top vote-getters to your board with recommendations for paring them down. This allows board members their own time to examine the budget critically and to see that you are serious about saving money, not just about asking them to raise it.

A Questionnaire with Some Suggestions

This questionnaire is structured around budget categories common to most organizations. Most anything our organizations do results in an expenditure, unless it is staffed by volunteers, with supplies and expenses donated or in-kind. This questionnaire presents the chance to examine each of these expenditure categories.

Personnel: Using logs staff have kept for a month (if possible), is personnel time used in your highest priority areas? In other words, do you spend time doing what you most believe you should be doing? What about your volunteers? Note that benefits such as sick leave, vacation time, health insurance are not in question. In fact, use time you can save by doing this process to help staff see they should take the time off stated in their job descriptions!

Printing: Easy questions: Have you solicited in-kind donations for larger jobs? Have you considered trading advertising (in a publication or program-book or on a big banner at an event, etc.) for printing or graphic design services? Harder questions: How could you print less? Does what you print serve your priority purposes, your mission? Does it get read? Do people who use what you print help you pay for it?

Phone: Because they are so detailed, phone bills are a good indicator of how staff time is used and can supplement the staff logs suggested above or serve as a reality check. The questions here: Who are staff and volunteers calling? Why? How much would be saved if callers were not helped ad infinitum but were told up front that every half-hour conversation actually costs your organization \$____? What would happen if you requested something in return for what amounts to consulting by phone?

Postage: Can you have postage donated for larger mailings? Traded for advertising as with printing or graphic design? When was the last time you purged your publication mailing lists? Asked for subscriptions, or donations to cover your costs? Can mailings be shorter, articles more succinct, fewer, more strategic, and save both postage and printing costs?

Travel/Meetings: If you are travelling to give something of value, such as a speech or workshop, are you asking for reimbursement? If you're told this isn't possible, do you ask that monies be raised to support your coming? If your organization pays for you to give something away of value, are you certain it benefits the constituents you exist to benefit? If you are travelling to participate in a meeting or attend a conference, have you as an organization identified when and whether these are good expenditures, based on your program priorities and mission?

Memberships/Subscriptions/Donations to Other Organizations: If you join other organizations or subscribe to their publications: have you as an organization identified when and whether these are good expenditures, based on your program priorities and mission? How have these decisions been made? Should they be re-examined? Who benefits from these expenditures?

Rent: Can you obtain donated space? Can you sublet some

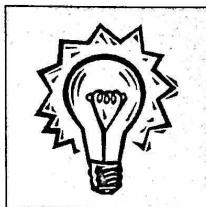
of your space? Have you asked groups who use your space to help pay for your costs? Or to make some other contribution to your organization's ability to keep having space they use? Can you buy a space? Have you considered what such a capital campaign might do to build your organization beyond simply purchasing you space?

Insurance: Get a "second opinion" periodically by shopping around, and keeping up with laws on what you have to have.

Supplies: Seeing what you can obtain donated in-kind is the main strategy here. But also: Do you really need Post-Its? Do staff use scrap paper? (Do you recycle?) Do folks take home pens, paper, make copies, etc. without realizing just how much on average per person your organization spends on supplies?

For all of these items and issues, it is often best to point them out in a meeting with everyone concerned, and with everyone in possession of a copy of your budget. Put in the context of a clear need not only to raise money, but to save money, this can be an eye-opening and motivating experience. **GFP**

Beth Raps does fundraising and organizational development consulting from Tallahassee, FL, where she is also completing doctoral studies in the philosophy of education.



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Video Examines the Rise of the Right

When Democracy Works, a video by Catherine Saalfield, explores the rise of the radical right-wing forces in the U.S. along with some forms of effective grassroots resistance to their anti-democratic agenda. This dynamic video, written by Scott Nakagawa, is the first to examine related policy initiatives of the theocratic and racist right and how their hatred and bias hurts ordinary people.

"I highly recommend *When Democracy Works* not only as an educational video about the Right in the US today," says Jean Hardisty, Executive Director of Political Research Associates in Cambridge, MA, "but also as a guide for the average person who wants to become involved in defending democratic values of tolerance, pluralism, and social justice."

This groundbreaking 30-minute activist video is available from Frameline, the world's source for lesbian and gay film, video and alternative media. The film rents for \$60 and normally sells for \$200. *Journal* readers may take 25% off the sale price (no discount on rental) simply by mentioning that you read about the film here. **For more information, call or write: Desi del Valle, Frameline, 346 Ninth Street, San Francisco CA 94103, (415) 703-8650.**

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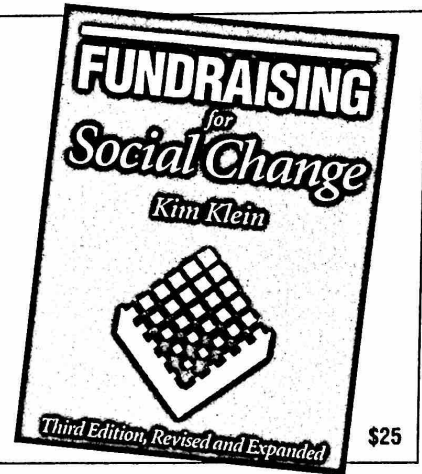
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