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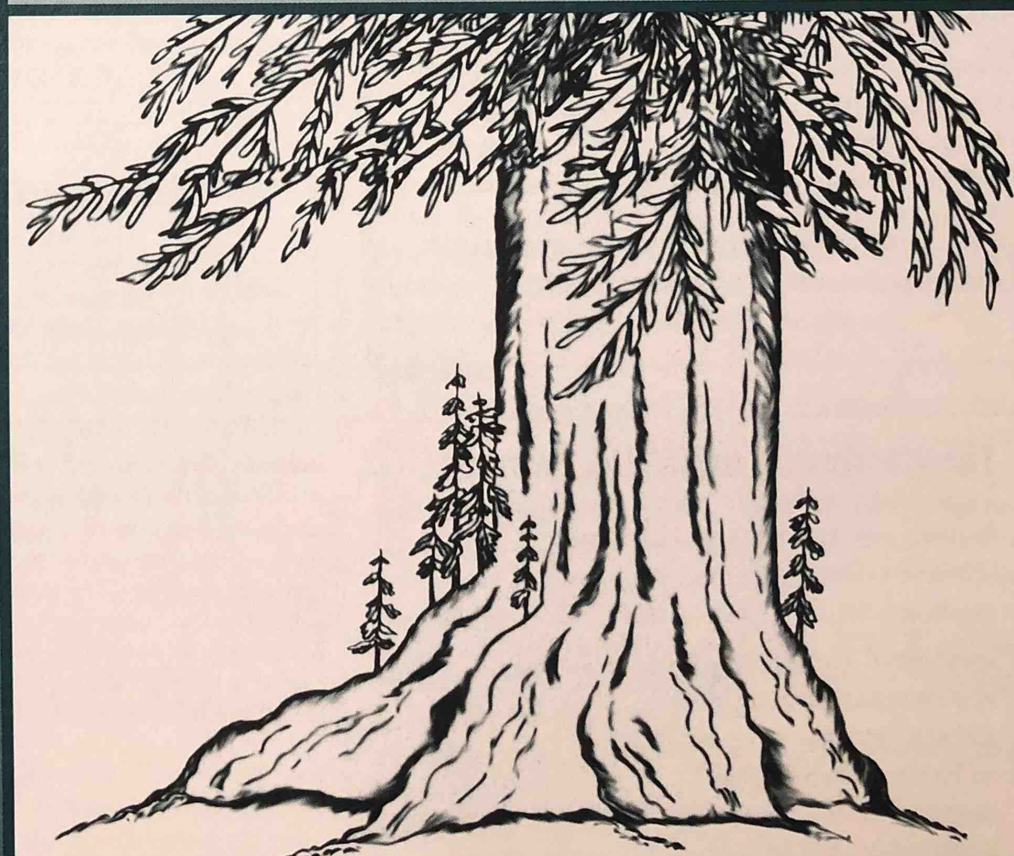

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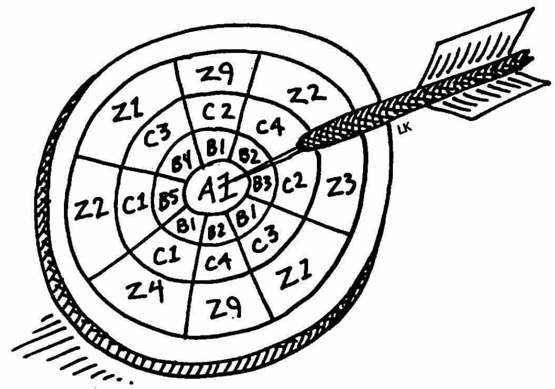
Donor Rating for Small Organizations



by Sue Merrilees

A rating system is a tool most often used by universities and other large fundraising institutions to organize their donors and prospective donors, usually for capital campaigns. This is not just because these institutions have thousands of people to track, although the need for a rating system does increase with the size of a database. Even organizations with relatively small lists of prospects and donors can benefit from using ratings.

Although rating systems differ in complexity, basically a donor or prospect is assigned both a letter representing their *inclination* towards an organization and a number representing their *ability* to make a donation. For example, an A1 rating can indicate someone who is highly involved with and enthusiastic about the organization (A) and can give $10,000 (1). A rating is a short-hand way of assessing a prospect using all the information you have, from giving history, to remarks made during a visit, to insights from board members.

A rating system is useful for a number of reasons. It represents a valuable analysis of the donor base, singly and as a whole. Knowing to the letter (and number) what kind of potential you have for raising money is always helpful.

Ratings preserve institutional memory. This is a concern to all organizations, especially with the sometimes quick turnover of development staff. When maintained consistently, a rating system remains even when staff does not. In this way, it helps ensure that the organization's relationship with a donor proceeds smoothly.

Ratings also enable an organization to sort, and therefore target, donors quickly. With a rating system in place, staff can easily identify who should be receiving attention and what kind of attention. For example, someone whose inclination represents "Little or no involvement" or "displeased" needs to be involved first and cultivated before being solicited.

Since ratings directly correspond to "best guess" ask amounts, they are useful when setting goals, whether for an annual fund or a capital campaign. It will be easy to construct a feasible gift chart if your goal is $10,000 and you know how many of your prospects can be approached for gifts of $1,000.

Additionally, a rating system demonstrates how much information you have (or don't have) about your donors and prospects. If you find that you cannot rate your major donors, or even identify them, this is a signal that more information gathering is needed. If you cannot judge someone's inclination or ability, you are not ready to approach them to ask for a donation.

Inclination + Ability

Although many people focus primarily on the ability component of a rating, it is secondary to inclination when it comes to tangible results. Identifying someone with lots of money but no connection to your organization results in paralysis. Crafting an approach to a prospect is frustrating and ultimately futile if you have no realistic way of reaching them.

Inclination indicates a person's connection to your organization, not to the cause in general. Although Ted Turner has an interest in international humanitarian causes, he is an A to the United Nations, not necessarily to your organization. At best, ability indicates how much someone could conceivably give. However, it is inclination that gets that person to give in the first place.

Inclination

Inclination is a mixture of interest/enthusiasm about a cause and level of involvement with an organization. Together, these factors determine a prospect's inclination or readiness to be solicited. The timing of the solicitation is also affected by other information known about the person. A recent capital gift, a divorce or business reversal may postpone the solicitation, although this is a judgment call in each case. Do not assume a change in circumstance automatically precludes a gift. Here is a sample of the inclination component of a rating system:

A High level of involvement and/or enthusiastic about organization

B Some involvement and/or enthusiastic

C Little or no involvement and/or unhappy with some aspect of organization

Z Not yet rated as to inclination

First, your solicitation efforts should focus on A's. In most cases, A's have given before or are good prospects for doing so. This is not to say that B's and C's should be ignored. Some B's are ready to be solicited, although probably not for the highest gift in their ability range. Their willingness to give will help determine if they are ready to become A's. Other B's and all C's and Z's are simply at the beginning of the donor cycle—cultivation. If handled well, B's and C's are your future A's.

Ability

Ability refers to a prospect's giving ability. Research—whether it includes subscribing to on-line computer search services, poring through local newspapers, reviewing alumni or client questionnaires or getting feedback from board or staff who know the prospect—will provide information to help you determine ability. However, just because a person has the money does not mean they are willing to give it away. Finding out what they actually give to other organizations is a good indication of ability. Look at annual reports of other organizations, where donors are often listed by gift levels. These will be solid indicators of a prospect's possible gift range.

Here is a sample ability component of a rating system:

1 $10,000+

2 $5,000–$9,999

3 $1,000–$4,999

4 $500–$999

9 Not yet rated as to ability

Starting Out

Assigning and maintaining ratings is labor-intensive. You should only rate someone your organization considers a major donor, whether determined by the solicitation approach (usually a personal visit) or by the amount of their donation or potential donation.

For consistency, one person should assign the ratings after reviewing all the data on each person. The key that explains the rating criteria (beyond the descriptions contained in the chart) should be written down so that a future rater has a sense of how the ratings were determined. You wouldn't want a 1 rated in 1998 to be different from a 1 rated in 2002. Here are two samples from a rater's key for an A:

A= Former board member, current outreach committee vice-chair, close friend of executive director, has given every year since 1987

A= New member of alumni association, scheduled to host event in home for new students. No giving history, but has told trustee (a close friend) of intention to contribute.

The "rater" should develop the ability part of the system based on the current donor base, with room to grow. If your largest current donor gives $25,000, a 1 rating of $250,000 will be meaningless, unless you have good reason to suspect such a gift might be forthcoming in the future. Make the system work for your specific situation. It can always be revised later.

Maintenance

Everyone in the development department should be aware of the rating system and what the different levels mean. Maintenance, which includes upgrading current ratings and adding new ones, should be done by either the original rater or whoever is directly responsible for managing the prospect or donor – tracking their involvement, initiating contact or deciding upon an approach strategy.

Make a note to the file or computer record of the reason a change was made. For example, during a visit from a board member an estranged donor says, "Now that I've heard your reasoning, I'm satisfied with the shift in the organization's strategy." This encounter should be written up, however briefly, and dated with the notation, "Upgrade from C to B." Likewise, if a newspaper clipping reveals that a prospect has sold their business for a large profit, put that in their file with the note to reflect the change, e.g. "Move from 4 to 2."

A rating system can help you see the results of your work that are not reflected in money raised. Try to see each visit as an opportunity to build a relationship that will lead to a larger gift in the future. Even if a visit does not result in a gift, it will result in more information and possibly an upgrade. This is progress.

Donors as Numbers

Some may shrink from a using a rating system because they feel it turns their donors into numbers. Of course, both names and numbers are merely symbols for a person. The important thing to remember is not to treat your donors like symbols, that is, impersonally. A rating system actually can help you avoid this by forcing you to learn more about your donors, by analyzing them first as individuals, then approaching them in the most appropriate way.

One final word about rating systems. Do not use the formation of a rating system as an excuse for avoiding solicitations. Although gathering and organizing information is important, at some point you will have to approach the prospect directly. Ultimately, the only way to discover if, and how much, someone will donate is to ask them. GFJ

Sue Merrilees is a Class Giving Officer at Stanford University.

Testing and Tracking Your Results

Fine-tuning your direct mail package to yield the best returns

by Pat Munoz and Amy O'Connor

Reprinted, with permission, from River Fundraising Alert, *a publication of River Network.*

This article discusses direct mail testing and how to track and analyze the results of your mailings. To do well at direct mail, it is essential that you experiment, both with lists and with various elements of your "package," to find out which lists, and which "spins" on your package, produce the best results.

One, Two, Three–Testing, Testing, Testing

List testing

When you are using any large list (5,000 names or more) for the first time, no matter how well you think the list is going to perform, you should first "test" a random sample of 2,000 names to see what results it produces. Because most lists available for rental on the market have minimum orders of 5,000, you will want to work with a list broker who is able to provide quantities of fewer than 5,000 names per list to you.

If your "test" of 2,000 names does well, you can then mail to the entire list with a fair assurance that the results will mirror your test results. Many small groups have been badly burned by conducting mailings with large lists they thought would do well and getting a dismal return. Don't let this happen to you.

Testing Elements of the Package

If you are serious about your direct mail program you should be testing elements of your new member package to see if you can reduce your costs, increase your response, or both. The only rules you need follow are:

1. *Test only <u>one</u> variable at a time*
2. *Be sure that the test groups are truly comparable*
3. *Mail all pieces that are part of a test at the same time*

The reasons for these rules are obvious. If you test two or more variables at once (such as the color of the envelope and the type of postage), you won't know which variable has influenced the results. If you use two different lists (instead of two random segments of the same list) you won't know if the difference in response is attributable to the list or to the variable. And if your test packages are not mailed at the same time, your results will be meaningless, since the date you drop your mail is a variable in itself and can significantly affect your response rate.

While there are many variables you could test, the most important are:

1. *The outer envelope copy, design, type*
2. *The letter*
3. *The cost of membership (what you charge to be a member)*

Other variables you might want to test are the use of a first-class stamp vs. bulk-rate postage, premium vs. no premium, enclosures such as press clippings vs. no extra enclosures, and handwritten addressing vs. labels. (Note that the super-personalized handwritten envelope will almost invariably produce better results but is logistically difficult to implement, especially if large quantities are involved.)

Let us consider what is involved in testing just one of these potential variables: the letter. If you have been mailing out the same basic letter for some time and response rates are beginning to drop, you might consider testing a new letter against the old "control" letter to see if you can improve results. As with list testing, you will need a list of at least 4,000 names that you can split into two comparable test groups. To one segment of the list you will send the "control" letter; to the other, you will send the new letter you have just developed.

To track the results of this test, you will need to code the reply cards or reply envelopes in order to distinguish between responses from each group. For example, you might have access to 4,000 Sierra Club names. For your test mailing you could have the merge/purge service use a computer program to randomly select 2,000 names for test package one and 2,000 names for test package two.

Each sub-list would then be coded on the mailings labels, say as "1" and "2," to ensure that you can distinguish the returns by a source code once new members are entered into your database.

It is ideal and most efficient for you to use numeric codes printed on the label which can simply be recorded in a "source" code field in your database. You should do everything in your power to get your database to accommodate a source code field and to therefore allow accurate tracking of the lists in each of your direct mail campaigns.

If all else fails, you can resort to coding your lists by running a magic marker down the edge of a stack of return envelopes or labels that are to be attached to return cards. Both the position and color of the markings can be used to indicate which test group the piece belongs to, provided you keep a record of what the markings mean and tally the responses as they come in.

Once all the responses are in, you will be able to see whether the new letter has generated more responses, or a higher average gift, or both, than the old "control" letter. If the new letter outperforms the old, then it is time to use it as the "control" letter, at least with that particular list.

The Tracking Game

Tracking Responses

As you go through the process of designing your package and arranging for your mail to be sent, it is vital that you put in place a system by which you can easily track returns from your mailing. This is usually done by coding the reply cards so that when checks come in, you can look at the accompanying card and tell which list the new member came from. This is then recorded in a "source" code field in your database. If you are buying or exchanging your lists through a list broker, it is easy to ask the broker to put a code on the labels you are acquiring. Make the codes mnemonic if possible so that they remind you of the name of the organization the list came from (for example, a Sierra Club list could be coded SC100 or something similar).

With small lists from canoe clubs or similar organizations, you may have to get more creative and keep a sample of the labels (if the typeface is distinctive), run a magic marker down the labels, or use some other device to let you know which labels came from which lists.

Whatever system you use to identify each list, be sure that you record it carefully. And if you repeatedly mail to the same list, be sure you use a different code each time so that you can analyze the results of each individual mailing to that particular group. That way you'll know if and when the list stops working for you.

It is important to try to track the results of your mailing on a daily basis. Just as depositing all checks should become a part of the daily routine, so should logging in responses to direct mail. If you do this faithfully, you will soon get familiar with the pattern that the results follow and, after a few mailings, be able to predict with a good deal of accuracy what the final outcome of a mailing will be by looking at the first few weeks of results.

Usually, the returns follow a bell-shaped curve over a 4–6 week period, and then end abruptly, with dribs and drabs still coming in for many weeks. You can make your daily tallying easiest if you enter your new members directly into your member database, recording the "source" code for the particular list that member came off of in a specific field dedicated to that information in your database. Your system should then be able to take this daily information and produce daily reports. If your system does not allow this, or if you do not have the time to enter all of the names into the database daily, try using a simple form like the one shown here ("Weekly Membership Acquisition Report") to record your information daily.

WEEKLY MEMBERSHIP ACQUISITION REPORT FOR THE WEEK OF:

List name:__________ Code:__________ Quantity Mailed: __________ Mail Date:__________

MONDAY		TUESDAY		WEDNESDAY		THURSDAY		FRIDAY		PREVIOUS TOTAL		CUMULATIVE TOTAL		AVERAGE GIFT	RESPONSE RATE	NUMBER OF LARGE GIFTS		
number responses	amount received	number responses	amount received	number responses	amount received	number responses	amount received	number responses	amount received	number responses	amount received	number responses	amount received			$500	$250	$100

List name:__________ Code:__________ Quantity Mailed: __________ Mail Date:__________

MONDAY		TUESDAY		WEDNESDAY		THURSDAY		FRIDAY		PREVIOUS TOTAL		CUMULATIVE TOTAL		AVERAGE GIFT	RESPONSE RATE	NUMBER OF LARGE GIFTS		
number responses	amount received	number responses	amount received	number responses	amount received	number responses	amount received	number responses	amount received	number responses	amount received	number responses	amount received			$500	$250	$100

List name:__________ Code:__________ Quantity Mailed: __________ Mail Date:__________

MONDAY		TUESDAY		WEDNESDAY		THURSDAY		FRIDAY		PREVIOUS TOTAL		CUMULATIVE TOTAL		AVERAGE GIFT	RESPONSE RATE	NUMBER OF LARGE GIFTS		
number responses	amount received	number responses	amount received	number responses	amount received	number responses	amount received	number responses	amount received	number responses	amount received	number responses	amount received			$500	$250	$100

Tracking Costs

As you pursue testing, you will find that some tests are more expensive to implement than others. Therefore, it is especially important to record all costs incurred so that, in your analysis, you can determine which approaches being tested are the most cost effective.

As you handle the various aspects of the mailing, keep copies of all your receipts together in a file so that, when the mailing is over, you can put together a full picture and do an accurate cost/benefit analysis. If you are renting some of your lists, record these costs separately for each list. A sample cost sheet for a direct mail might look as follows:

SAMPLE COST SHEET FOR A 20,000 PIECE DIRECT MAIL

ITEM		COST
Design		$ 500
Printing:		
Letter		340
Outer Envelope		360
Inner Envelope		240
Reply Card		240
List Rental:		
5,000 American Rivers	*@ .05/each*	250
5000 Sierra Club	*@ .08/each*	400
3000 WV Magazine	*@ .05 each*	150
List Processing/Merge/Purge		400
Postage		2,200
Premiums		0
Stuffing and Mailing		2,000
Fulfillment Costs (Thank-yous)		200
TOTAL COSTS		**$7,300**

This cost sheet is for a very simple mailing which does not include any premiums or any enclosures other than the letter, reply card and reply envelope. It does not include staff time spent on the mailing.

Tracking Lists

When doing direct mail, you must keep track of how your lists perform so that you know which ones to go back to and which ones to abandon because they are too expensive or ineffective for your group. We recommend starting a List History like the one shown below in which you track the performance of your lists over time.

Keeping track of your lists will allow you to quickly weed out the unproductive lists from the productive ones and make your mailings more and more cost effective as you learn which lists work best for you. It will also be invaluable to new staff taking over the membership function who may not be familiar with past list performance. (Hopefully your database will produce such a history using the source code data that you enter for each new member; if not, just set up a table on your computer following the format shown below.)

If you keep track of how lists perform over time, you can learn a lot about both the lists and the time of year when they perform best. You can also determine which segments work best for you (for example, which geographical areas) and how often you can mail to individual lists and still obtain good results. (You can often mail to good lists two to three times a year and get the same high response rates.)

Recording and Analyzing Your Mailings

When the mailing has run its course, it is important that you immediately record and analyze the results. You should keep at least one complete copy of each package (letter, outer envelope, reply card, reply envelope, any enclosures) in a binder or folder with all records and analysis pertaining to the mailing. This will prove invaluable for creating an institutional memory of the work you're doing.

The information that you should consider keeping in your binder includes: the source codes of lists mailed to, organization names corresponding to the source codes, number of pieces mailed, number of pieces returned, date mailed, cost, income, response rate (for each list and overall), average gift (for each list and overall), net loss or gain (overall and by list), and cost/benefit ratio.

SAMPLE LIST HISTORY

NAME OF LIST (source code)	TOTAL OF NAMES	NUMBER OF NAMES USED	LIST SEGMENT	DATE USED	RESPONSE RATE	AVERAGE GIFT	TOTAL COST	TOTAL INCOME	GAIN/ LOSS
American Whitewater Affiliation (AWA 101)	30,000	3,000	(MD/DC, WV)	2/20/98	1.5%	$35	$975	$1,575	+ $600
American Whitewater Affiliation (AWA 100)	25,000	2,500	(MD/DC, VA, WV)	5/3/97	1.5%	$32	$750	$1,440	+ $690
American Rivers (AR 100)	25,500	5,000	(MD/DC, WV)	2/20/98	2.0%	$28	$1,875	$2,800	+ $925
Sierra Club (SC 101)	500,000	5,000	(WV)	2/20/98	1.0%	$25	$2,025	$1,250	– $775
Sierra Club (SC 100)	475,000	2,500	(WV)	5/3/97	1.0%	$24	$950	$600	– $350
WV Trout Unlimited (TU 100)	40,000	2,500	(WV)	2/20/98	.8%	$30	$600	$813	– $213

Look at the hypothetical report below on a 20,000-piece mailing. By analyzing this mailing, we can see that the cost-benefit ratio is about 1/1. This means that every dollar spent on direct cost brought in another dollar. Another way of saying this is that the mailing broke even, which is extremely good and increasingly rare in today's direct mail market. This happened because most of the lists mailed to were sure bets, with only one test list, the WV Magazine, which we will not use again because of its poor performance.

Even though the Sierra Club and the Trout Unlimited lists did not break even, their response rates were good by today's standards, and we will definitely use them again in the future, particularly since both these lists are large. We might want to test a different letter with the Sierra Club list, to see if we can improve the response rate, the average gift, or both by using a more environmentally oriented message. The Sierra Club list was more expensive than some of the others because we had to buy it for $80 per 1000 names, so we might see if we can exchange for the list next time to cut costs.

When you begin soliciting members via direct mail, your goal will be to make your mailings break even or even to make a small profit. Later, as you begin to do larger mailings, your response rate will probably go down, and you will begin to lose money on these initial mailings. Just remember that you are investing in members who, if properly treated (with newsletters, member involvement, appeals, major donor programs, and renewals) will pay back the investment and provide core funding for your group in the long run.

Nevertheless, it is vital to keep track of how much you lose on any given mailing, how individual lists perform, and what the cost/benefit ratio for the mailing is. Over time, you may even want to track when the mailing breaks even and you begin earning "dividends" on your initial investment if your computer system can handle this level of analysis.

Direct Mail Acquisition is Only the Beginning

Because members tend to become more loyal and more generous over time, investing in members is much like counting on compound interest. The more the initial investment, the greater the returns in the long run. But, much like a stockbroker who watches over and fine-tunes his accounts, we in the nonprofit sector must always take care of and properly cultivate our hard-earned new members. This is especially important in light of the fact that acquisition costs are high and a member sometimes begins to pay for himself or herself only after two or three years.

After you break even on members, any contributions they make, except for basic maintenance costs, can go toward general operating costs, such as salaries and rent. That's why membership retention is so critical to a successful membership program. In addition, all along the way your members provide an incredible source of political clout, community involvement, volunteer labor, board prospects and other more intangible resources for your group.

As you pursue your direct mail membership acquisition program, remember that you are in control and can pursue the program at whatever level your organization's leadership is comfortable with and your cash flow allows. Whether on a large or a small scale, your efforts will help build a more stable funding base as well as solid public support for your cause. GFJ

Pat Munoz works for River Network (503/241-3506), a national organization helping people organize to protect and restore rivers and watersheds. Pat can be reached at River Network's eastern office at (202) 364-2550.

Amy O'Connor has her own business, Integrated Development Consulting, based in Salt Lake City, Utah.

DIRECT MAIL REPORT

NAME OF LIST (source code)	QUANTITY MAILED	NUMBER RETURNS	AMOUNT RETURNED	RESPONSE RATE	AVERAGE GIFT	TOTAL COST	GAIN/ LOSS
American Whitewater Affiliation (AWA 101)	3,000	45	$1,575	1.5%	$35	$975	+ $600
American Rivers (AR 100)	5,000	100	$2,800	2.0%	$28	$1,875	+ $925
Sierra Club (SC 101)	5,000	50	$1,250	1.0%	$25	$2,025	- $775
WV Trout Unlimited (TU 100)	2,500	20	$600	.8%	$30	$813	- $213
WV Magazine (WV 100)	3,000	6	$120	.2%	$20	$1,125	- $1,005
CCA (CCA 100)	1,500	30	$900	2.0%	$30	$488	+ $412
TOTAL	**20,000**	**251**	**$7,245**	**1.3%**	**$29**	**$7300**	**- $55**

Time Management Tips for Fundraisers

(Others Can Use Them Too)

by Kim Klein

I learned two things about fundraising in my first six months of my first job. First, that the bulk of money given away in the United States (90% to be precise) comes from individuals, while foundations and corporations only account for 10% of private-sector (that is, non-governmental) giving. That understanding about the sources of money for nonprofit groups has formed the basis of the material in the *Journal* for the past sixteen years.

The second thing I learned while new to this work is implied in a lot of the *Journal's* writing, but I will state it explicitly here: being a fundraiser means you have too much to do, more than any human being could ever accomplish. And besides, your work never ends.

Being a fundraiser means you have too much to do.

With this in mind, a few simple time-management techniques can make the difference between being panicked about the work being out of control, and feeling okay about the work being out of control.

Before you dismiss that distinction as New Age double-speak, consider this: facing the fact that you have way to much to do means you can stop wasting time fretting about it. You can settle down and do the most and best work you can do, and let the other work wait.

In a fundraiser's day, twice as many tasks need to be done as are humanly possible to complete. Things are always falling through the cracks. The trick is to let things fall that aren't that important or that can be postponed. A lot of us have gotten into the bad habit of only doing things that are urgent and have a deadline attached. Unfortunately, in fundraising, those things are often not what yields the most money. For example, there is no deadline for calling Sally Jane Bigbucks. She is not calling you, either. So you sit with the name of this qualified prospect and the months pass.

Seven Ways to Boost Productivity

Here are seven things I do that make a world of difference in my productivity. A word of caution in the beginning: while you will recognize these as tried-and-true time-management principles, you need to adapt them (and any other time-management tips) to your personality. Some of these simply won't work for some people; trying to make them work will just make you more inefficient.

1. Your desk

Keep on your desk only the project you are working on at the time. Move everything else onto the window sill, a credenza, another table, even the floor if that's all you have. (If your group is really short of money, spend two hours at a flea market or garage sale and buy a table or another desk to put things on.)

If you have piles of folders, pieces of paper, your stapler, your extra disks, or even your phone on your desk along with the project you are working on, you have too many distractions. You get stuck on a sentence you are writing and you think, "I'll just fill up my stapler," or "I'll just call my friend briefly." It can take up to twenty minutes to regain interrupted concentration, even if you are interrupting yourself.

2. Your phone

The telephone is one of the greatest time drains in all our offices. Move your phone off your desk. Put it where at least you have to stretch to reach it, and preferably where you have to stand up to answer it. This inaccessibility will prevent you from making unnecessary phone calls. Furthermore, you will be prepared before you get on the phone. If you have to ask someone something or make an appointment, you will be sure to have the paper you need to refer to in front of you, or your calendar open.

It can take up to twenty minutes to regain interrupted concentration, even if you are interrupting yourself.

Remain standing while on the phone. This shortens your phone conversations tremendously and gives you a greater sense of control over your phone time.

Obviously if you are the main or only person answering the phone, moving it off the desk may not be practical. In that case, let the answering machine take calls for a few hours a day. Start answering the phone at 10:00 instead of 9:00 and put the machine on again during lunch time, even if you don't go out for lunch. Unless you are an emergency line, it is totally acceptable to keep your phone machine on for up to half a day. You can screen the calls and pick up any that are urgent.

3. Your planning

Each month, take 30 to 60 minutes (yes, seriously) to plan your work for that month. (The monthly plan is, of course, based on your overall work plan for the year.) Set goals, list deadlines and make an outline of projects to be done.

Then, set aside a minimum of 15 minutes every day to plan that day based on your monthly plan. Make a detailed plan of what you need to accomplish that day. Many people do this at the end of the day for the next day, so that they can get right to work in the morning. If it works better for you to do it in the morning, do so.

While there are any number of expensive and more or less useful calendars and planning documents you can fill in, I use an 8½ by 11 piece of scratch paper and a pencil. I write both my work and personal to-do lists on the same piece of paper. (I add personal things on my official to-do list because otherwise, as I get more frenetic, my personal life gets dropped or squeezed.) When my lists are made, I put times beside each activity. If the times are completely out of order, I transfer the list chronologically to another sheet.

Some people prefer to use a rating system, going from A (most critical) to C (least critical). This rating system expands fairly indefinitely when you use codes such as A1 as the most important, A2 as the next most important, B1 for the most important B item, and so on. I know many people who use these codes very effectively, and they obviously work. My problem is that everything seems like an A or a B, and although a coding system is inexhaustible, my time is quickly used up. By assigning specific times, I find I make a more realistic to-do list.

It is also useful in terms of accurate time planning to double the amount of time you set for most tasks. This allows both for the tasks themselves to take longer and for you to be interrupted to focus on something you hadn't planned on. A method many people use is simply to plan four hours of work in an eight-hour day. This also acknowledges the very necessary need to take breaks which, when you're enthusiastically imagining all you will accomplish, can easily be left out of your plan.

Make a detailed plan of what you need to accomplish each day.

4. Your papers

You need three receptacles for paper. These can be drawers or baskets or simply piles on an empty surface.

One is for things that you will be doing that week, but not that day. That group of papers sits near or in your desk, but not on it. The second pile or receptacle is for papers that you have to deal with soon, but there is no pressing need to deal with them this week. The final receptacle is for things to read. Of course, the really final receptacle is the recycle bin or trash can.

You will notice that I don't keep a "to be filed" file. To tell the truth, I do have a pile of stuff to be filed, but I think the best way to deal with things to be filed is to file them immediately. (I'm working on getting better at that myself.) We lose a lot of time looking for things in our "to be filed" pile that we could easily find it they were in the right file. It should only take you 5–8 seconds to retrieve any piece of paper.

If you make it a rule to handle each piece of paper only once before deciding what to do with it, you will move your paper flow a lot faster.

5. Your meetings

Have fewer of them. While we have to do work in meetings, and admittedly a certain amount of the work we do at meetings is socializing and building camaraderie, many meetings are not essential, and almost every meeting lasts too long. Question every meeting: Is it necessary? If it is, do I need to be there, for part or all of the meeting? Make sure there is an agenda with times beside each item. People tend to talk for the amount of time that is listed. You can negotiate the need for extra time as it comes up.

6. People who drop by or call just to talk

You are not obligated to talk for the length of time that other people have available, no matter how important they are to your organization. Depending on your relationship with the person, you can use more or less subtle ways to help them wind up their conversation and leave. If you are a peer or a friend, try being straightforward: "I am so jammed right now, I just can't talk." Then, if you want, "Let's set another time."

If it is your boss, or a board member or donor who is not a peer or friend, there are a few things you can do. First, either get rid of chairs in your office so there is nowhere for them to sit, or keep papers on the chair(s), so you will have to move something for them to sit down. Don't move anything unless you feel it is necessary.

Second, have an arrangement with a co-worker to interrupt you after ten minutes to hand you a piece of paper that looks like a message. You can then say, "Oh, I need to take care of this." Or you can say at the outset, "Thanks for stopping by. I have an appointment in ten minutes, but let's chat for a minute." If you act unhurried, but establish your boundaries quickly, your visitor will not feel rushed, but will not stay.

If the halls aren't carpeted, you can sometimes head off visitors when you hear one coming down the hall by standing up before they get there. When they come in your office, remain standing. Again, chat as if you have all the time in the world, but don't sit down. Your visitor will not stay.

Finally, you can move people along with body language. While *you* are talking, look at your watch or glance at your calendar. It will make the visitor conscious of time without making them feel you are not listening.

7. Your priorities

Set priorities in this order: Start with the source of funding that is a combination of the biggest, the most likely to repeat, and the likeliest to come through. In balancing those three variables, place more emphasis on the repeatability and likelihood than the size. For example, for the overall health of the organization, you would do better to seek a gift for $1,000 from an interested individual prospect than a foundation grant for $10,000. The $1,000 gift will probably be repeated and upgraded over many years, whereas the foundation grant will be spent and finished inside a year.

Forgive Yourself

When you have done all this, forgive yourself for not getting some things done. The nice thing about being a fundraiser instead of a neurosurgeon is that our decisions are not life-threatening. Let that help you keep some perspective. GFJ

This article first appeared, in slightly different form, in the Journal*'s Vol. 9, No. 5, October 1990.*

Book Reviews

by Kim Klein

For your summertime reading...

I have recently come across a firm called Energize, which is a training, consulting and publishing company specializing in volunteer management. They have a number of helpful resources, some of which have been in publication for a while, which just shows that there are always new things to learn and discover! Energize also has a web site with free tips, information and a description of their services (www.energizeinc.com). Susan Ellis, one of their lead consultants, posts a "Hot Topic" essay every month on the web site. You can also call them at (800) 395-9800 and request a free resource catalog.

Of their materials that I have read, the following are probably the most helpful to *Journal* readers:

The (Help!) I-Don't-Have-Enough-Time Guide to Volunteer Management
by Katherine Noyes Campbell & Susan J. Ellis

This guide is a revised and expanded version of an older book called *No Excuses: The Team Approach to Volunteer Management.* Noyes and Ellis contend (and I totally agree) that volunteer management is a skill that can be learned, but is rarely taught. There seems to be an assumption in the nonprofit world that people intuitively know how to be volunteers and how to deal with them. This book is written especially for people who have been given the task of volunteer recruitment and management as a part of their already too big job.

This easy-to-read book provides a step-by-step framework for creating a team approach to volunteer management. Among many other things, it covers how to:

- Set boundaries and provide clear expectations
- Find administrative volunteers and use their skills well
- Help everyone, whether paid of volunteer (or, as we refer to it at the *Journal,* low-paid and unpaid staff) feel ownership in the organization.

The book also has forms, evaluation techniques, sample job descriptions and so on to make the application of the ideas easy.

115 pages. Paperback. $14.75
ORDER FROM: **Energize, Inc., 5450 Wissahickon Avenue, Philadelphia, PA 19144-5221**
OR CALL: **(800) 395-9800**

The Volunteer Recruitment Book
by Susan J. Ellis

If you are having trouble recruiting or keeping volunteers, this is a very helpful book. Ellis details why some people volunteer and others do not, where to look for new volunteers, and the pros and cons of more than 20 different recruitment techniques. Most helpful for some *Journal* readers is her chapter on membership development for all-volunteer groups.

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National Guide to African American Funding

The National Committee for Responsive Philanthropy (NCRP) has taken over the distribution of the Ecumenical Resource Consultants (ERC) *Guide to African American Funding.* The directory features 120 funders that indicate African American projects as a priority in their mission statements. The sources include 61 independent and community foundations, 22 corporate foundations and more than 35 religious funders. In addition, 54 funders that make grants to African American projects are listed, even though these funders do not mention these types of projects as a priority in their mission statements. ERC is no longer in operation, but NCRP will send you the directory for $10 to cover reproduction and postage. Call NCRP at (202) 387-9177.

Free Fundraising Tip Sheet Available—

Hurry, offer expires July 1, 1998

What kind of information do you need about your prospects in order to plan an effective fundraising campaign? How can you obtain this information? And how can you use it to build a campaign that meets its fundraising goals?

A free fundraising tip sheet from the publisher of *Point to Point: The newsletter of public relations, marketing, communications and fundraising for nonprofits* answers these questions and more. "How to Use Focus Groups for Fundraising" walks nonprofit executives through the key elements of obtaining the information they need to plan, develop, and carry out effective fundraising campaigns.

"Too many nonprofits spend thousands of dollars on developing fundraising materials without knowing what will motivate their prospect to give," explains Lynn Stearney, editor and publisher of *Point to Point.* "My tip sheet explains how to use focus groups to develop effective fundraising appeals."

For a free copy of "How to Use Focus Groups for Fundraising," send your name, the name of your organization, and your mailing address by July 1, 1998 to Point to Point, Free Fundraising Tip Sheet Offer, Lynn Stearney Communications, P.O. Box 705, Exeter, NH 03833-0705, or fax (603) 778-2301 or e-mail stearney@nh.ultranet.com. For more information about *Point to Point* call (603) 772-4428.

Does Your Group Sell Stuff?

Andy Robinson, author of *Grassroots Grants,* is working on a new book about earned income strategies for social change groups. If you get at least 10% of your budget from selling mission-related goods, services, or publications, Andy would like to know more about your work. Each group featured in the book will receive $200 and lots of great publicity. Call Andy at (520) 798-3993 or e-mail him at andyfund@earthlink.net.

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Number 1 (2/93): But Will They Open the Envelope?; Seeking Corporate Support; The Bowl-a-Thon; Profile of a Major Donor Couple; Report from the Road.

Number 2 (4/93): The Fundraising Letter; Getting Your Share of Workplace Giving; Report from the Road.

Number 3 (6/93): Do You Have an Effective Board of Directors?; The Reply Device; What Good Givers Do; Report from the Road.

Number 4 (8/93): How to Develop a High-Dollar Giving Club; In the Public Eye; Book Review: 999 Tips, Trends and Guidelines; Profile of a Major Donor; Report from the Road.

Number 5 (10/93): Dealing with Staff Discord; When Money Isn't the Problem; Fundraising in October; Getting Off Direct Mail Lists; Report from the Road.

Number 6 (12/93): Take Advantage of December; The First Staff Person; Clean Up Your Language; Free Software; Book Reports.

VOLUME THIRTEEN

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Number 6 (12/96): Look Before You Leap into Fundraising Software; Who's Doing What on the Internet; *Grassroots Grants:* Words and Layout, Mastering the Basics.

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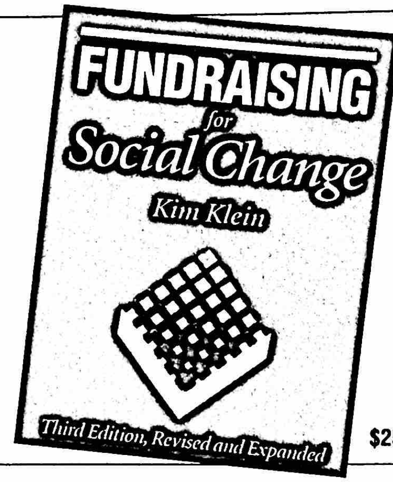

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