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Grassroots Fundraising Journal

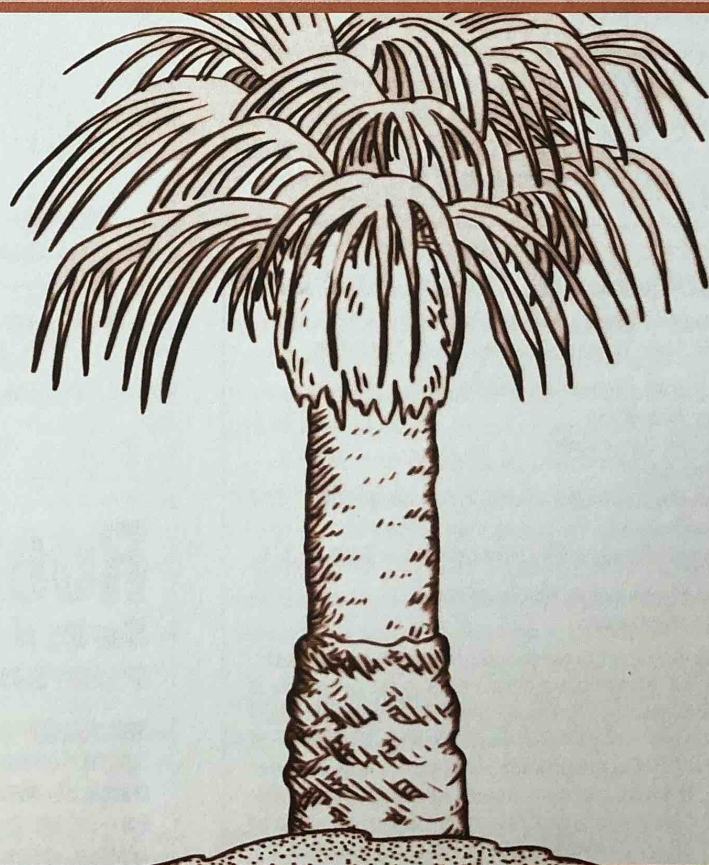
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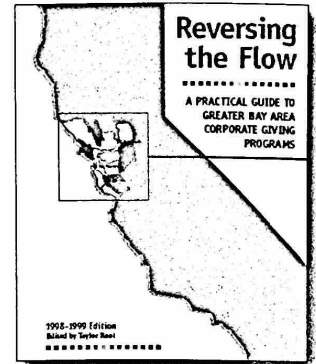
UPDATED AND SUBSTANTIALLY REVISED FOR 1999

Reversing the Flow

A Practical Guide to California's
Greater Bay Area Corporate Giving Programs

Edited by Taylor Root

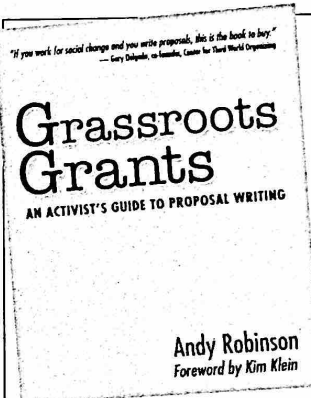
This guide is all you need to begin or expand your corporate giving program. Contains information on more than 100 corporations in the Greater Bay Area, including Sonoma, Napa and Sacramento counties. Detailed information provided on grant guidelines, size of grants, and deadlines. Includes tips on how to approach corporations.



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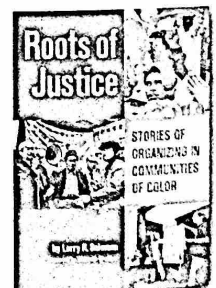
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Roots of Justice

Stories of Organizing in Communities of Color

BY LARRY SALOMON

Roots of Justice recaptures some of the nearly forgotten histories of communities of color. These are the stories of people who fought back against exploitation and injustice — and won. *Roots of Justice* shows how, through organizing, ordinary people have made extraordinary contributions to change society.



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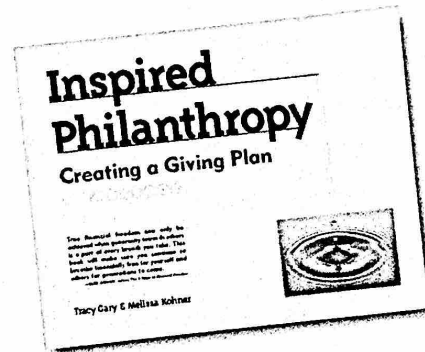


How Much Do You Want to Give?

AN EXCERPT FROM

Inspired Philanthropy: Creating a Giving Plan

by Tracy Gary and Melissa Kohner



As is obvious from its title and history, *The Grassroots Fundraising Journal* is primarily concerned with how grassroots organizations can raise money. However, from time to time we look at issues related to giving money, since giving is the behavior we want people to engage in. Interviews with a number of donors have appeared as our "Profile of Major Donor" series, and other articles have focused on how donors deserve to be treated and how important it is to relate to a donor as a whole person and not just a checkbook.

Last fall Chardon Press published a book on this topic called, *Inspired Philanthropy: Creating a Giving Plan*. The authors, Tracy Gary and Melissa Kohner, have explored what it takes to be an effective and inspired giver in great depth, both as donors and as political activists.

This chapter from their book discusses giving from another angle: How much should each of us be giving? How do we think about our own giving? How do we set an example for others, so that when we ask for money, we are actually asking someone to join us in doing something we have already done?

Part of the reason we published this book was to reclaim the word "philanthropist." The Minnesota Council on Foundations has a delightful video called "What is Philanthropy?" The filmmaker asks people on the street, "What is philanthropy?" "The study of monkeys," replies one person. "Stamp collecting," says another. But for those a little closer to the true definition, the answer is often, "When rich people give away money."

Considering, however, that families living on incomes of \$10,000 give away 4% of their income and families living on incomes of \$100,000 give away merely 1.3%, I think it is fair to claim that our poorest community members are our most philanthropic, and that we have erroneously ceded the term "philanthropy" and the

glory that comes with it to the extremely wealthy.

As all social activists know, a critical part of claiming power is claiming the right to name ourselves. For me, coming of age during the Women's Movement, it was important to say, "I am a woman, I am not a girl," and to be clear that the word "mankind" did not include me, despite claims to the contrary. "People with disabilities" has taken the place of the terms "handicapped" or "disabled" as a more accurate reflection of what having a disability means. We see similar patterns in language about race and sexual orientation.

The word "philanthropist" comes from two words that mean "love of people." At its heart, that is what philanthropy is about. So, the following excerpt from Gary and Kohner's excellent book asks all of us who give away money to think of ourselves as philanthropists, and to spend the time it takes to make sure we are giving what we can, and giving in ways that most express our values.

You can read more chapters of this book on our Web site (www.chardonpress.com), and you can also order the entire book there. I encourage you not only to buy it, but to read it. I also encourage you to share this chapter with board members, volunteers, and those paid to help raise money — it will create some interesting conversation.

Anyone who includes in their values giving away money can claim for themselves the title of philanthropist. Doing so allows people to see themselves as agents of change. Saying, "I have some money to give, how can I use my philanthropy most effectively?" makes us feel much different than the more common refrain, "I don't have any money and I don't know anyone with money."

We all can give something. When our gifts are put together with those of enough other people, the amount of money generated may just do the work we think must be done.

—Kim Klein

As an individual donor, your contributions will fall into two categories: money and time. These, in turn, encompass a variety of options. In the money category, you may want to donate smaller amounts to several organizations

and larger amounts to one, or a few. For those organizations to which you anticipate being a major donor you have several options. After discussing with a group how your gift might be most helpful, you can make a cash donation out-

SOME FACTS ON NET WORTH IN THE U.S.

- Americans with incomes of \$14,768 or less (the bottom 20 percent) have, on average, assets of -\$7,075 (they are on average \$7,075 in debt), whereas the top 20 percent (making \$68,015 or more) have, on average, assets of \$871,463.
- Those with the top 20 percent of assets control 80 percent of the wealth in the U.S.
- The wealthiest 1 percent of Americans have more wealth (35 percent of the total) than the bottom 92 percent combined (32 percent of the total).

right to an organization's operating or program needs or, if you have stocks that have appreciated in value, you might elect to make a gift of stock that would benefit you also by reducing taxed capital gains. (If your donation is sizable, you can leverage it by requiring it be matched by other donations in any ratio you choose. For example, you can match with \$2 every \$1 given by others, or vice-versa.) Rather than giving immediate operating or program income, you can give to an endowment program.

Similarly, volunteer time can be spent doing program work; for example, working a regular shift on a rape crisis hotline, at a community food bank, or as a Girl Scout leader. Or you can do organizational work, such as serving on a board of directors or on an event committee. Or you might provide in-kind services by donating professional skills, such as legal advice, graphic design, writing, etc., or material supplies such as paper or other office supplies, or computers or other machinery.

In this chapter, we explore the different philosophical and spiritual approaches to giving that might help you decide how you're going to sort out the choices of how you want to give of your financial resources.

A Legacy of Giving

The tradition of compassion through giving and service is celebrated in all religions and cultures, not only as an act of benevolence, but as a way to bring peace, justice and a sense of prosperity among people. Giving of your time and money is more than simply doing good. It is a conscious, intentional act to weave oneself into a caring culture.

Giving part of your income or assets, whether it is easy to do or a financial stretch, and giving a portion of your time out of a desire to share and help, are gifts that extend not only to the recipient, but back to the giver as well. We believe that those of us who do not give, or who do not give at our real capacity, are missing out on a joyful, wise and heartfelt experience. Moreover, if society is to reflect the real pluralism that exists around us, it is absolutely critical that we share our good fortune through compassionate action.

On the other hand, almost everyone has some anxiety about whether they have enough money, particularly whether they can "afford" to give some of it away. Likewise, our time seems ever more precious and scarce.

Our attitudes towards these resources of money and time are formed early. The income our families did or did not have as well as messages we received about how we use money and time while we were growing up become both conscious and not-so-conscious beliefs and attitudes when we are grown. The socioeconomic class in which we were raised, the class backgrounds of our parents and extended families, and the class that we would currently describe ourselves as falling within all exert enormous influences on how we think about money. For example, if you grew up in a household where there wasn't always enough money for essentials like food and clothing, you may still be anxious about having enough food and clothing, regardless of how much income you have now. If your parents volunteered in church activities or community programs, you may be more comfortable with the idea of donating time to a cause than someone whose background didn't provide such a model.

One way to reduce your anxiety around money is to think about the beliefs you hold about it. Do you feel, for

Exercise 1

HOW MUCH MONEY DO YOU REALLY HAVE?

5 minutes

Most of us have a distorted idea of where we fall on the nation's economic scale. Check out your relative financial situation in the following short quiz.

My household income is... (check one)

- less than \$25,000 (35.8 percent of the population)
- \$25,000-\$34,999 (13.7 percent of the population)
- \$35,000-\$49,999 (16.3 percent of the population)
- \$50,000-\$74,999 (17.8 percent of the population)

- \$75,000-\$99,999 (8.2 percent of the population)
- \$100,000 or more (8.2 percent of the population)
 - \$119,540 or more (5 percent of the population)
 - income in excess of \$330,000 annually and net worth of \$2.5 to \$3 million (top 1 percent of the population)

No matter what your income, if you earn any money at all, you have more money than one billion people in the world. Worldwide, average annual per capita income is \$800.

example, that you have more or less than your share (see Exercise 1), or that you may not have enough in the future? Do you believe that you can or do earn enough money to support yourself and any family dependents who may need your help? Your answers to these questions may help you articulate more specifically what you're anxious about (and therefore what the next step is), or show you that your beliefs can override your fears.

Another way to address your feelings about how much you have and how much you want to give is to articulate your values and beliefs about living compassionately in the world. Some of us were raised with, or now follow, a religious tradition that clearly spells out the role of giving money and time within a set of spiritual values or practices.

HOW MUCH SHOULD YOU GIVE?

Exercise 2

5 minutes

On average, Americans give away only about 2 percent of their income to charity. However, we know that many people give significantly more than that.

In thinking about what percentage of income you want to give away, you might start by looking at the chart below. Find your income level, then look across the row until you see an amount that feels comfortable to you as an amount to give away. Look at the top of the chart to see what percentage that is. Do both the amount and the percentage feel right to you? If not, where is the disparity? If you have given in the past, what percentage of your income does your past giving represent? How does it compare with the amount or percentage you chose on the chart?

IF YOUR INCOME IS	AND YOU WANT TO GIVE					
	2%	3%	5%	10%	15%	20%
\$30,000	600	900	1,500	3,000	4,500	6,000
\$40,000	800	1,200	2,000	4,000	6,000	8,000
\$50,000	1,000	1,500	2,500	5,000	7,500	10,000
\$60,000	1,200	1,800	3,000	6,000	9,000	12,000
\$75,000	1,500	2,250	3,750	7,500	11,250	15,000
\$100,000	2,000	3,000	5,000	10,000	15,000	20,000
\$150,000	3,000	4,500	7,500	15,000	22,500	30,000
\$200,000	4,000	6,000	10,000	20,000	30,000	40,000
\$250,000	5,000	7,500	12,500	25,000	37,000	50,000

Note: You may choose your level of giving based on your pretax or post-tax figures.

This year I/we want to give \$_____, which represents _____ percent of my/our income.

Next year I/we want to give \$_____, which represents _____ percent of my/our income.

TAX-DEDUCTIBILITY

- To itemize donations to nonprofits of more than \$250, get a receipt with your name as donor, the date of the gift, and the amount given and keep for your tax records.
- Check with a tax advisor for the deductibility of itemized volunteer or out-of-pocket and travel expenses and what receipts are required.
- Gifts of appreciated stock, property and cash have various beneficial tax advantages; check with a tax advisor.
- No one will benefit more from your IRAs upon your death than a nonprofit (due to complex taxes upon death). List your favorite groups as beneficiaries of this part of your estate at least.

We describe here the major philosophies of giving, some spiritually based, some not. Use them to help you develop or refine your own philosophy of giving to guide you. Then use Exercise 2 to determine how much you want to give.

Stewardship

Many people believe they're merely shepherds of the money they earn or inherit and have a responsibility to use their money for the public good. This philosophy is based on the belief that claiming ownership of wealth reinforces the unequal power structures that enable just a few people to accumulate large amounts of money. Some who subscribe to this philosophy keep only enough money to cover their basic living expenses and give the remainder away. Notably, a number of people who inherited large amounts of money have given away all but enough to live an average comfortable life. For some inspired reading about these donors, see *We Gave Away a Fortune* by Christopher Mogil and Anne Slepian.

Tithing

Long held as a practice in many religions, tithing means giving away one-tenth of your income (a tithe is literally one-tenth). This practice is based on the belief that only 90 percent of what you earn (or inherit) actually belongs to you and the rest must be used for the good of humanity. This is similar to the notion of stewardship, but with a specific formula for guidance. Many people like the idea of basing their giving on a percentage of their income, but choose less (or, in some cases, more) than 10 percent as their benchmark. In Judaism, the notion of tithing is expressed as *Tzedakah*, Hebrew for "righteous giving." In Islam, this same practice is called *Zakat*. As in other religions, 10 percent is expected from all.

ALTERNATIVE WORKPLACE GIVING FUNDS

More than 208 alternative funds expand access for donors within workplaces who are interested in the democratization of philanthropy with an emphasis on community-based giving. Funds solicit for their member agencies or grantees which include health agencies, community development organizations, neighborhood groups, arts and cultural organizations, women's groups, African American, Hispanic, Asian American and gay/lesbian groups. The alternative funds movement is growing rapidly—it expanded by 27 percent between 1991 and 1996, while United Way's growth in employee contributions for the same period was only 4.2 percent.

If your workplace doesn't have payroll deduction giving options, we urge you to call your local alternative fund or United Way. Be sure that whatever plan you sign up for includes groups that match your values and perspectives on social reform. If not, ask for more choice in the programs being offered. (The National Alliance for Choice in Giving can give you more information about environmental funds, Black United Funds, Women's Funds and Social Action Funds in your area. Contact them at 2001 O Street NW, Washington, D.C. 20036; phone: 202/296-8470; e-mail: 74041.2454.) If you are a government employee giving through a federated campaign you may have several issue-oriented groups as options.

Workplace Giving

Many donors participate in workplace giving campaigns whereby charitable donations are deducted regularly from employees' paychecks. The system is most often administered by and benefiting a federation of agencies.

Contributions can be made to a general pool or designated for specific member organizations or for particular issue or interest areas. United Way has been the largest and best-known fundraising federation, focusing primarily on human service needs.

More recently, alternative funds have entered this arena and are not only building good track records but also raising money at a rate higher than United Way (see box). Many donors embrace workplace giving as a method of fulfilling their desires to give a percentage of their income without having to call on the discipline of making individual contributions from home. Other donors see their payroll deductions as a small piece of their entire giving plan. Also, because donations are spread out over the year's payroll periods and come from money the employee never actually has in hand, many use this method to give a sizable amount over the course of a year.

Giving Away Principal

Although not a giving philosophy per se, "never touch principal" has been such a time-honored belief among people with inherited or earned wealth that it deserves a mention here. In addition to those mentioned above who have given away most of their assets, today some who have inherited or earned wealth are choosing to use a portion of their assets as a resource for giving during their lifetime. These assets include stocks, bonds, real estate, insurance policies or works of art. Given the intricacies of tax benefits for gifts of cash, appreciated assets and planned gifts, you might want to work with a financial planner, or estate or tax professional to consider just how much is possible or advantageous for you to give.

Thinking a Little Bigger

Imagine a 28-year-old who gave \$3,000 each year until she died at age 91. In 63 years of lifetime giving, she would have given \$189,000, not including any gifts that came from her estate after she died. Use the following brief exercise to calculate your potential lifetime giving. **63**

Exercise 3

HOW MUCH WILL YOU GIVE DURING YOUR LIFETIME?

5 minutes

Think for a moment of how much money you gave to nonprofits last year or, if you prefer, start with the figure you decided to give in Exercise 2. Now multiply that amount by the number of years you expect to live (for example, if your life expectancy is 88 and you are 48 now, multiply your giving by 40 years). Add to that an estimate of how much you've given away in your life before now, plus a percentage of your estate (10–50 percent) to nonprofits you care about.

$$\begin{array}{r}
 \$ \underline{\hspace{2cm}} \times \underline{\hspace{2cm}} \\
 \text{YOUR AVERAGE ANNUAL GIVING} \qquad \qquad \qquad \text{LIFE EXPECTANCY YEARS FROM NOW} \\
 \\
 + \$ \underline{\hspace{2cm}} = \$ \underline{\hspace{2cm}} \\
 \text{TOTAL AMOUNT YOU} \qquad \qquad \qquad \text{TOTAL LIFETIME GIVING} \\
 \text{HAVE GIVEN UP TO NOW} \\
 \\
 + \$ \underline{\hspace{2cm}} \\
 \text{ESTATE GIFTS (ESTIMATE)}
 \end{array}$$



Revisiting THE *Phone-a-thon*

by Kim Klein

Got a phone? Of course, you say. Probably more than one. Most likely, you also have a phone answering machine and maybe a cell phone. Telephones are not only omnipresent in our lives, they are the way many of us do business. But the increasing proliferation of phones, while taken for granted, has implications for the way we do fundraising as well.

Although nonexistent in the lifetimes of many of our oldest residents and inaccessible or rarely used in many parts of the world today, the telephone is a basic fact of life for almost everyone in the United States and countries with similar infrastructure.

Just in my lifetime (I am 45, and for those who missed my birthday, it is November 17), the presence of telephones and their offshoots has developed rapidly. When I was a child, I knew many people who did not have a phone. Later, many of those people got a "party line" where they had a phone in their house, but shared the line with one or several other families in their town. There were no answering machines. If you weren't home, the phone rang and rang (the phone book used to advise people to let the phone ring at least ten times to allow a person to get to it). I was in college before I ever saw somebody let the phone ring without answering it. I was both impressed and appalled.

Answering machines made people both more and less accessible. More, because now you could leave someone a message; less, because you could do all your business with someone by answering machine and never have a conversation with them. Now if a person chose not to answer their phone, it could be because they were screening out particular callers by listening to who was leaving a message. Answering machines introduced a new chapter in the "I feel

rejected" encyclopedia.

As telephones and their ancillary devices—answering machines, caller ID, call waiting, conferencing—become more common, we become more ambivalent about the phone.

Long advertised as the "next best thing to being there," the telephone in recent years has taken on some of the qualities of a pesky mosquito, particularly in the field of fundraising. While people buy equipment to screen their calls and, we fear, to screen out solicitation calls, companies that make their living selling by phone spend time and money trying to figure out how to get around the ways they are being kept out.

Used correctly though, the telephone still can be an effective way to raise money, and most fundraisers (whether board members, volunteers, or paid development professionals) are noticing that the majority of their personal interactions with donors are by phone. Fundraising consultant Mal Warwick and others have noted that people under the age of 35 respond to fundraising solicitations over the phone in greater numbers than do people over 35, indicating that people who virtually grew up with phones and answering machines seem comfortable having them used for fundraising. (This age group tends to be comfortable with not answering their phone also.)

Make It Work for You

To make the phone work best for you, you need to follow the same advice the *Journal* gives readers about mail, special events, thank-you notes, or practically any other fundraising strategy: be as personal as possible, and remember that fundraising is a volume business. You can't make four or five phone calls and call that your strategy. If

you get 20 people to make four or five phone calls, you can call that a strategy, but it takes a certain volume of calls to generate enough money to make this strategy worthwhile.

Here is a list of the ways telephoning can be used in fundraising, going from the most effective to least effective uses:

1. People who give generously to your organization call their friends to ask for a specific donation for a specific program element.
2. People who give generously to your organization allow others to call their friends and use their names to request a donation.
3. Volunteers or staff (who give money as well as time) call people who have previously given a donation and ask for another one. The volunteers do not necessarily know the people they are calling.
4. Volunteers or staff make calls during a scheduled phone-a-thon, which has been publicized so people expect to be called.
5. Paid phone solicitors call people who have previously given and ask them to give again.
6. Paid phone solicitors call people who have never given, but who have been deemed good prospects.
7. Volunteers call people who have never given but who have been deemed good prospects. (In both #6 and 7, a letter may or may not have been sent ahead.)
8. Poorly paid phone solicitors call people at random.
9. Poorly trained volunteers call people at random.

As consumers, our most memorable experiences (and some would maintain, our most common) are #8 and 9, which is partly why phone solicitation is viewed negatively by so many.

The rest of this article details the various aspects of managing a phone-a-thon.

Who Should Call?

People often wonder whether to use paid phone solicitors. If they are well trained, paid a salary plus a bonus for money raised, and have some basic belief in the organization, paid phone solicitors can be very effective. They have a greater detachment than volunteers do from the donors, which allows them not to take rejection personally. Because they are being paid a salary they don't need to try to pressure anyone into making a gift, and their bonus gives them an incentive to work through the list.

Volunteers, on the other hand, are bound to be more sincere and will know more about the group and its work. They can let the person being called know that they are a volunteer, which tends to soften the heart of the most abrupt phone curmudgeon. Volunteers tend to talk longer with each prospect, which helps in building relationships, even as it can slow down the phone-a-thon. Some volunteers may need to talk over each call, which means they don't

move through their list as quickly, and because they don't have the practice that paid solicitors do, they are often not as smooth or articulate. Despite training, many volunteers do take rejection personally, and dislike making phone calls.

In the end, the decision about using paid people will depend in large part on the size of the list that must be phoned and the pool of volunteers available.

Who Should Be Called?

There are three types of people you can use the telephone to solicit:

1. People who have never given to your group, but have given to groups similar to yours; they are asked to join for the first time.
2. People who are currently givers to your group; they are asked for an extra gift for a special project.
3. People who used to give to your group, but have not made a gift in the last 18 months (lapsed donors); they are asked to rejoin.

Here are the odds of getting a gift from these groups: About 5% of the people being asked for the first time will give by phone, about 15% of people being asked for an extra gift will give by phone, and from 10-30% of people being asked to rejoin by phone will do so.

Preparation for the Phone-a-thon

1. Set a date: When choosing a day and time for your phone solicitation, pay attention to other events in your community and beyond—don't call during the last episode of a popular TV show, during the Academy Awards, or when most people in your community will be at a benefit for another group. Most people find that calling on a Tuesday, Wednesday or Thursday between 6 p.m. and 9 p.m. (don't call later than 9) at the beginning of the month (near payday) works best.

2. Find a room or rooms with several phones. Real estate offices, law offices, mail order companies, and any business that does a lot of business on the phone may be willing to let you use their phone system at night. You will need to pay for toll calls and be responsible about cleaning up.

3. Prepare a list of people to be called from the categories above. If you've never done a phone-a-thon before, the easiest list to prepare, and the easiest one to ask will probably be your current donors. Lapsed donors are also often friendly. They may have let their contribution lapse by accident, or thought they had paid. It is rare that they stopped giving because they decided they dislike your group.

Your list should include the person's name, address, phone number, and space to write what happened on the call. (See sample form on the next page.)

If you are using names of previous or current donors, add a column with the date and amount of the person's last gift. If nothing else, the caller can thank the donor for what

NAME	ADDRESS	PHONE NUMBER	RESPONSE VERIFIED?	ADDRESS SENT?	MORE INFO SENT?	THANK YOU SENT?	NOTES

Sample Phone-a-thon recording form.

they have already done.

4. Write a script/coaching sheet for volunteers. Generally, volunteers can "ad lib" after the second or third call, but initially a script gives them a feeling of security. The script should be brief and to the point. It should include what to do in the most common situations, but not try to address every possible scenario. The following is a sample script for soliciting new members:

"Hello, is John Smith available?"

If this is John, continue.

"My name is Vivian Volunteer, and I am on the board of Youth in Theater. May I speak with you for a minute?"

Be respectful of the answer. If the person says he cannot talk now, ask if you can call back later. If the person says he is not interested, say thank you nicely and hang up. If the person says,

"I never make contributions over the phone,"

ask if you can send them some information in the mail.

If the person says,

"Yes, I have a minute,"

continue,

"Youth in Theater has a simple mission – let young people act in plays, and produce plays written by young people. We work primarily in high schools, but some of our plays are performed at the local repertory theater. Have you heard of Youth in Theater?"

If yes, ask what the person knows. Say,

"I don't want to take your time telling you things you already know."

If no, say,

"I won't use up your time telling you all that we have accomplished – let me just tell you two things and then tell you why I am calling."

The two things should be brief—one or two short sentences each. For example,

"Youth in Theater wrote and produced a play called 'Death Penalty,' which won several awards, and was performed all over our state. Youth in Theater also got two gangs that were operating out of our high school to collaborate on a play about why teenagers join gangs, and we will be producing that play this year. Do you think this kind of work is important, Mr. Smith?"

If Mr. Smith agrees that these are good things, then say,

"Tonight we are looking for 100 new members, and I am hoping you might join Youth In Theater with a gift of \$35."

If he agrees, arrange to get the money either with a credit card or a check. If he says,

"\$35 is a lot,"

A BOARD MEMBER RECOUNTS HER FIRST PHONE-A-THON

I well remember the first phone-a-thon I participated in. We had traded donor names with another organization and planned to call all these people and tell them about our organization and ask them to join. I volunteered because I had the evening free and because so few other people had volunteered. So I was feeling martyred as I drove up. I also felt like a hypocrite making these calls because I know how much I hate to get them. But I had said I would be there, and there I was.

The trainer explained that we were each being given 100 names from this list. All we knew of these people is that they had supported a similar group. We were given a "script" and told to sound as natural as possible. So far, so bad.

Then the trainer said something that changed the experience entirely: "You have 100 names to call this evening. If you are able to get through all your calls, you will have five gifts. That is what 5% means! Don't worry about answering machines, rude people, people who say no nicely—just keep moving through your list. The majority of the people you call are not going to give."

I felt free as a bird as I moved through my list. I had some very nice conversations, even with people who didn't give. In the end, I had three gifts of \$50 and two of \$25, plus four people said they would "send something."

Knowing what success means makes all the difference in this kind of strategy.

tell him he can pay it in two installments. If he says, "**\$35 is not possible,**"

tell him that you have other membership options and ask what he would like to give. Thank him for whatever he decides to do.

Clearly, if Mr. Smith is a friend or acquaintance of the caller, then the call will be more friendly and informal. However, the caller needs to keep her eyes on the clock, and not get into a long chat with her friend.

When calling friends, a volunteer may need to say something like, "**I'd really like to catch up more, but tonight I am focused on my mission of calling people about this great theater group I am involved with.**"

5. Prepare also a list of commonly asked questions and answers.

6. Print estimated quantities of three letters for the callers to use for follow-up: one that thanks the donor for their gift of \$_____ (the caller fills in the blank); one that thanks the person for talking to the caller and includes more information about the group; and one for people who weren't home which also includes information on the group or the project. These letters will be sent with return envelopes and return cards.

7. Bring the callers together at least 30 minutes before the phoning begins. Go over the script, the common questions and have the callers practice with each other. Do not skip this step. Although awkward at first, trying out sample calls with each other will raise volunteers' confidence when they begin calling. Be sure to have food for your callers, and try to make the phon-a-thon festive.

To determine how many phones and how many callers you will need, estimate that one person can make 30-35 calls an hour (with up to 15 people actually being reached). The phoning session will last about 4 hours, with three hours of calling, 30 minutes of warm-up and 30 minutes of debriefing and wrap-up, so each volunteer should be given about 100 names to call. As the sidebar shows, the volunteers should be prepared for the fact that only 5 of these people will make a gift. Most will not be home, some will not give on the phone, some will be rude, and some will engage in pleasant conversation but not make a gift.

You may want to conduct your phone-a-thon over two nights, using the second night to try to reach people you missed on the first.

8. After the phone-a-thon, be sure to thank all the callers with a letter. Tell them how many people gave and how much was raised overall.

Phoning After a Mail Appeal

This method will increase the response to both the mail appeal and the phone-a-thon. The process is straightforward. A mail appeal is sent to a list of prospects. After

two weeks, everyone who has responded is taken off the list; those who haven't responded are called. The script varies slightly from a regular fundraising phone-a-thon in that a sentence is added such as, "I am Jean Vasquez from the Women's Shelter. We recently sent you a letter about our work. Did you have a chance to read it?" If the person has read it, you can move right to the close, "Will you be able to help us with a gift of \$35 tonight?"

On the other hand, if the person cannot remember the letter or claims not to have received it, the caller will go into a fuller description: "If you will give me a few minutes right now, I'll tell you what it said."

FIGURING THE COST-EFFECTIVENESS OF A PHONE CAMPAIGN

The following is a way to calculate the potential income from calling people who have not given to your group before. Looking at these numbers also illustrates the volume of names required for a phone campaign to be lucrative. Grassroots organizations can modify these to their own needs, however, and still be successful.

	1,000	CALLS
-	600	no answer, busy, disconnected, etc.
=	400	potential prospects reached
-	300	refuse to hear the whole presentation
=	100	actual full contacts
-	40	say no
=	60	say yes
-	10	don't pay
=	50	NEW DONORS (5% OF THE 1,000 NAMES)

Let's say you are trying to get everyone to make a gift of \$35 to your program, so donations equal $50 \times \$35 = \1750 . You are making \$1750 for every 1000 attempted calls, or \$1.75 per call. Since a volunteer or paid solicitor ought to be able to reach 15 prospects per hour (not including machines, disconnects, etc.), the solicitor is making \$26.25 for the organization per hour of calling. You can see that your profits are quickly depleted if you are paying people, which is a strong argument in favor of using volunteers as much as possible. If you have even the slightest luck, a few prospects will give \$50 or \$100, so you may make more per hour. You can do your own calculations to fit your situation.

If you are calling for extra gifts from current donors, or for renewals from lapsed donors, you will make much more money because of the higher rate of response from these groups.

Common Mistakes

Here are four common pitfalls that can lower your phone-a-thon's success.

1. When a person says they don't give by phone but would like to see some information, don't assume they are just trying to put you off. Many people will not give to a stranger on the phone, but that does not mean they will not give at all. Send them your literature.

2. Don't ask emotionally charged and leading questions that have only one answer, such as, "Do you care about retarded children?" Or, "Would you wish we had fewer children killed by guns in our community?" These questions serve to make a person feel guilty, frightened and patronized. They are the common tool of some telemarketers. While many people will give once out of guilt, shame, fear, or greed,

once they recognize the tactic they will not give a second time.

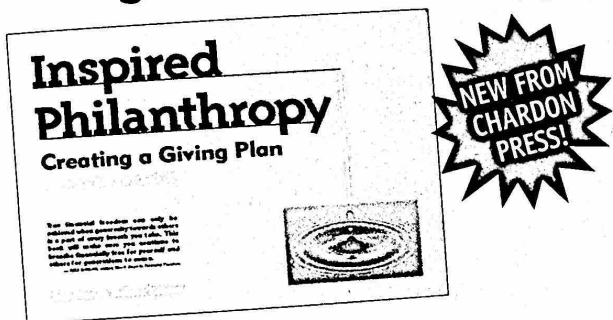
3. Don't read through a long script, not pausing for breath. Your script should be a few short sentences and should get to the point quickly. If you are describing something complicated, punctuate your script with questions of the prospect—"Did you see the article about that in the paper last week?" or "Do you know about our group—I don't want to tell you things you already know."

4. Don't delay in sending follow up letters and thank-you notes. Thank-you notes with return envelopes should be sent the night of the phone-a-thon, or the day after at the latest.

With appropriate training and realistic expectations of success, the telephone can be a powerful fundraising tool. **GFJ**

Kim Klein is publisher of the Grassroots Fundraising Journal.

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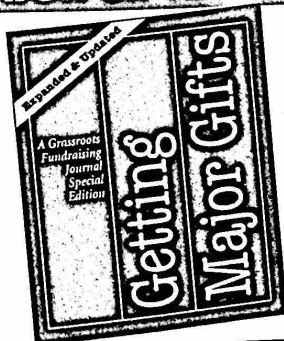
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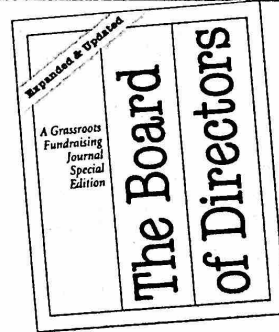
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Henry A. (Hank) Rosso

Mentor & Teacher

by Kim Klein

This article is our first memorial tribute. We hope we won't have many occasions to write more of them. It is fitting, though, that our first memorial is for Hank Rosso, who was my mentor and teacher when I became involved in fundraising more than 20 years ago, and remained someone I relied on for fundraising advice.

Hank was first in many things with regard to fundraising. He was the founder, with Joe Mixer, of The Fund Raising School, where I took my first fundraising training in 1978. He was one of the first to codify fundraising knowledge and to develop ways to share that knowledge with others. He remained the best fundraising teacher, even as more people took up teaching this craft. He was adamant and effective in promoting the idea that fundraising is an honorable profession, and that it should be integral to all the work of an organization. Much of what he taught and stood for has become common, but he was the pioneer.

Hank's 50-year career as a fundraiser transformed the field, particularly in the training of development directors, executives, board members, and volunteers. He defined fundraising as "the gentle art of teaching the joy of giving" and expressed that art in humane and compassionate terms that inspired others.

Hank taught tens of thousands of people through The Fund Raising School. Courses he pioneered have since been offered on every continent except Antarctica, and hundreds of thousands of nonprofits have benefited from the principles and techniques he first articulated. In addition to hundreds of articles and curricula, he compiled a comprehensive book, *Achieving Excellence in Fund Raising*, and wrote another useful text, *Rosso on Fundraising*.

There are some things about Hank I never knew until I read the notice of his death sent by the Indiana University Center on Philanthropy. It was characteristic of his humility that he never told me that, as a budding high-school journalist in Princeton, NJ, he was the first person in the United States to be granted an interview by Dr. Albert Einstein. After military service, he graduated magna cum laude from Syracuse University, and was elected a member of Phi Beta Kappa.

Over the course of his career in fundraising, Hank was given almost every award available to fundraising professionals, including Outstanding Fund Raising Executive of the Year in 1985 from the National Society for Fundraising Executives. Indiana University created an award called the

Henry A. Rosso Award for Lifetime Achievement in Fund Raising and then made him its first recipient. He received an Honorary Doctor of Laws degree from both Indiana University and Pacific Union College.

Hank will be best remembered by those of us in grassroots fundraising for his unending patience with the groups he taught, and for his tremendous generosity with his time. He gave hours of advice at no charge and was never irritated at having to answer the same questions over and over. When I went to work for the Coalition for the Medical Rights of Women in San Francisco in 1978 (my first fundraising job), the Coalition's steering committee gave me a tape of a conversation they had had with Hank. They had called him and explained that they couldn't afford to attend his Fund Raising School, but wondered if he could recommend any resources. As very little had yet been written about grassroots fundraising, Hank invited a group of them to his home and spent the evening giving them advice—in reality a short course on how to do fundraising—which they taped. That advice formed the basis of the fundraising plan the Coalition developed, and served as the foundation for our very successful fundraising efforts.

I traveled with Hank and his wife, Dottie, who was also his steadfast and tireless business associate, to more states than I can remember, as well as to Jamaica (twice) and Dominica. He absorbed information like a sponge, and rarely forgot anything. I loved working with him not only because I learned so much, but also because he and Dottie were a lot of fun. He had a tremendous sense of humor, and he was a connoisseur of food. I always knew that when I traveled with Hank I would eat well and laugh a lot.

Hank's greatest gift was his ability to inspire in people the confidence that they could raise money, and people often remarked after his workshops that he had made the impossible possible. It is to Hank that nervous solicitors owe the reminder, "Kick yourself out of the way and let your cause do the talking."

A few years ago Hank developed Alzheimer's Disease, so we have been missing him for some time. His family asks that contributions be made to the Hank Rosso Memorial Fund, Indiana University Center on Philanthropy, 550 West North St, Suite 301, Indianapolis, IN 46202, or to National Alzheimer's Research, 919 North Michigan Ave, Suite 1000, Chicago, IL 60611-1678. **GF3**



More Help on Nonprofit Law

The International Guide to Nonprofit Law

by Lester Salomon
400 pages / Hardback / \$125

Reviewed by Kim Klein

This book is an excellent summary of the nonprofit laws in 22 countries, including Australia, Brazil, Canada, Egypt, France, Germany, Hungary, India, Republic of Ireland, Israel, Italy, Japan, Mexico, the Netherlands, Poland, The Russian Federation, South Africa, Spain, Sweden, Thailand, the United Kingdom, and the United States. The price is high, but I have never seen all of this information collected in one place in an easy-to-use format.

In an impressive feat, this book makes obscure and difficult information accessible. For example, Salomon's discussion of the legal context of US law is introduced with this sentence:

The United States is a common law country that nevertheless has a written constitution. In addition, the country has a federal government structure that features a national government and 50 state governments with their own elected officials and their own authority to exercise sovereign powers. These circumstances make the legal position of the nonprofit sector far more amorphous and disjointed in the United States than the significant size and scope of this sector might suggest.

I felt some relief reading this: I am confused because the situation is confusing.

Reading about other countries provides some interesting history of the development of the nonprofit sector. Consider France for instance:

The legal position of nonprofit organizations in French law is of relatively recent vintage.... Such organizations were outlawed at the time of the French Revolution on grounds that they represented partial interests that were potentially opposed to the "general interest" embodied in the democratically elected French state. In addition, severe limits were placed on endowments to prevent the perpetuation of centers of economic power not responsive to the democratic will of the people.

Or Mexico:

Charitable organizations had historically been established under the umbrella of the Catholic Church until the second half of the nineteenth century, when, due to the separation of Church and State, the government began to take a more active role in defining and regulating philanthropy.

Salomon also suggests an International Statement of Principles, which he believes would further a vital voluntary sector.

Salomon, a long-time researcher, has furthered our collective knowledge of the role of government in many ways.

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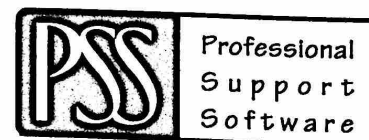
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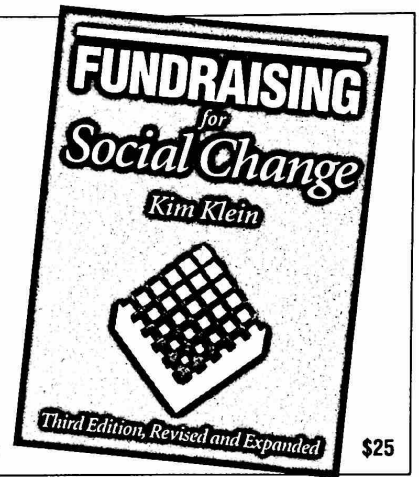
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