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Grassroots

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Journal

IN THIS ISSUE:

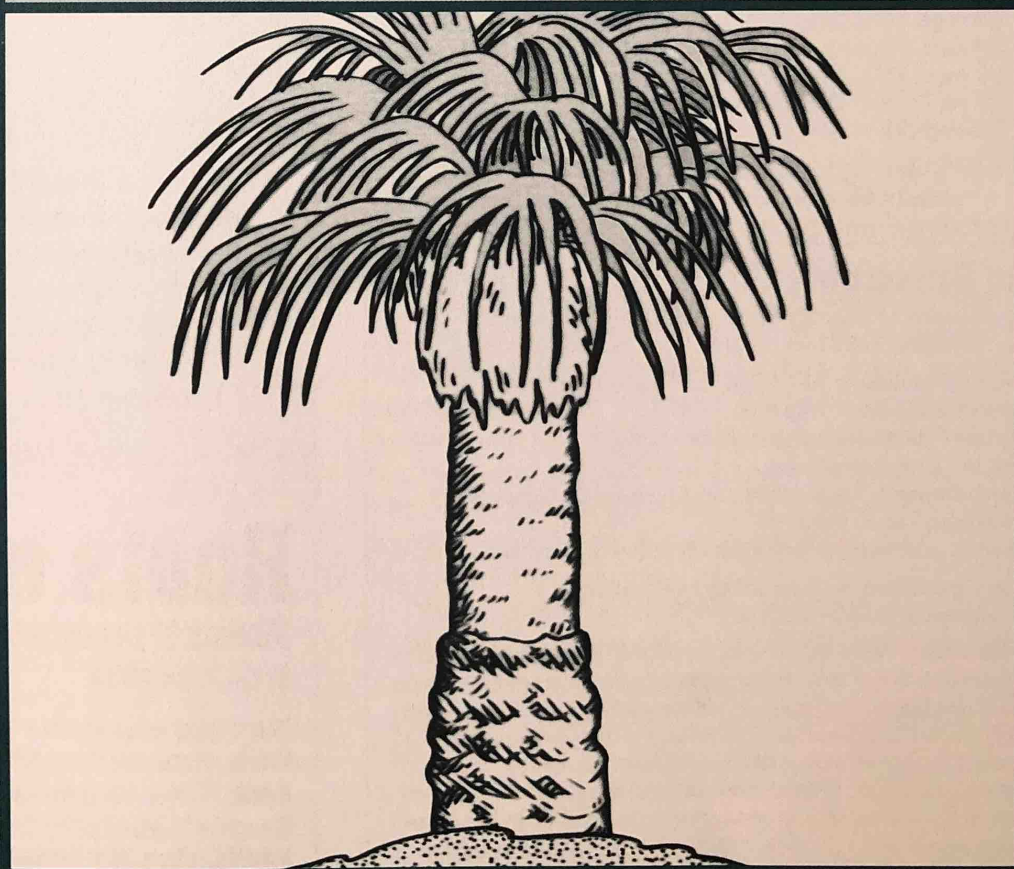
**Choosing the
Right Fundraising
Strategy**

**Budgeting for
Planned Giving**

**Hiring a Fundraising
Consultant**

**When Everyone
is a Volunteer**

Book Review



IN THIS ISSUE VOLUME 18: NO. 3

TECHNIQUES:

- Choosing the Right Fundraising Strategy** 3
Kim Klein and Stephanie Roth

PLANNED GIVING SERIES—PART 3:

- Budgeting for Planned Giving** 7
David Schmeling

- Hiring a Fundraising Consultant** 10
Kim Klein

STAFFING:

- When Everyone is a Volunteer** 12
Kim Klein

BOOK REVIEW:

- Fistfuls of Dollars** 13

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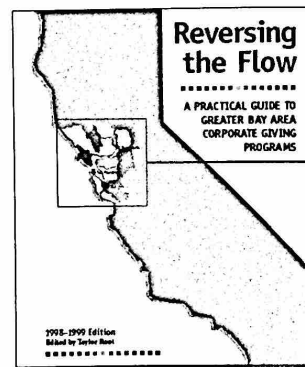
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Edited by Taylor Root

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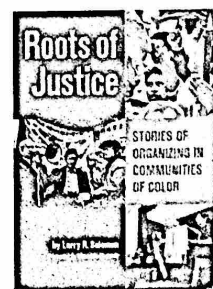
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Roots of Justice

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.



\$15

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Choosing the Right Fundraising Strategy

by Kim Klein and Stephanie Roth

The steering committee of the Coalition to Save our Jobs is having a meeting. They have been trying to persuade a corporation to stay in town rather than take their jobs elsewhere, as they are threatening to do. On the Coalition's agenda is how to counter a high-profile ad campaign the corporation is using to show that the labor union's demands are forcing them to move out of the community. The Coalition has tried to publicize their side of the story, but without much luck. They need more money, both for more publicity and to hire more organizers.

Each member of the steering committee has an idea of what fundraising strategy will be best. Joe says that they should put all their efforts into a golf tournament. They will get sponsorships from local businesses, churches, and sympathetic politicians, which will bring a lot of publicity. A golf tournament can raise a lot of money, he says, and, more important, will show that the religious and small business community is behind the Coalition.

Anne thinks a direct mail campaign will reach more people with one message and carry much less risk than a golf tournament. Once people read the Coalition's viewpoint, she says, they will want to join and help.

Barry thinks that a few people should simply ask a few of the donors who can give bigger gifts to do so, and keep their publicity efforts separate from their fundraising.

Who is right? The firmest answer we can provide is, "It depends." It depends on what else the Coalition wants besides money for the time it will put in, how fast they need money, how many people can help with fundraising, and so on. Once the Coalition has answered these questions, it should then review the strategies that are available, discuss what each strategy can and can't do well, and choose the one that works best for their situation.



Match the Strategy to Your Goals

There are thousands of groups like this coalition. Some are large and well established, and some are brand new, fresh from the grassroots. Many, unfortunately, have this in common: they tend to choose fundraising strategies badly and then to be disappointed with the results.

Fundraising strategies vary in what they can accomplish. Every fundraising strategy is good for some things and bad for others. For your fundraising activities to have successful outcomes, you need to know which strategies to use in which circumstances.

The following is a brief description of the most common strategies and what they are best used for, beyond or in addition to raising money, along with what response you can expect from each. In every case, we assume the organization knows how to identify donor prospects appropriate to the strategy. (For more on identifying prospects, see Kim Klein's articles in the *Journal*, "Identifying Prospects," Vol. 10, Nos. 1 and 2, February and April 1991, and "You Already Know All the People You Need to Know to Raise All the Money You Want to Raise," Vol. 16, No. 2, April 1997.)

As you consider which fundraising strategies to use, keep in mind how you are approaching your donors or prospects:

- are you trying to bring in new donors (acquisition)?
- do you want to keep current donors giving regularly (retention)?
- is your goal to get current donors to give larger amounts of money (upgrading)?

A healthy fundraising program will use a range of different strategies over the course of a year to accomplish all three of these objectives.

We have divided the range of strategies into those that require some personal knowledge of the prospect and those that can be used with people not known to the organization. Keep in mind that the closer someone is to your organization, the greater likelihood of them giving repeated and larger gifts, so we recommend concentrating first on those strategies that capitalize on donors or prospects who have an existing relationship with your group or someone in it.

Strategies requiring some personal knowledge of the prospect by the solicitor

Personal face-to-face solicitation

What it is: This strategy, often associated with raising money from major donors, involves meeting with a prospective donor by pre-arranged appointment and asking them for a contribution to your organization. A prospect is defined as someone who 1) has the ability to give a gift of the size you're asking for, 2) believes in the work you are doing, and 3) knows either the organization or the person who is asking them for money.

Percent of response: 50% of prospects will say yes. Of that group, however, half will give less than the amount you asked for.

Best use: To upgrade donors, to bring in large gifts from qualified prospects, and raise large amounts of money quickly.

Comments: Many grassroots organizations feel intimidated by this strategy, claiming they don't know anyone with enough money to justify setting up a face-to-face meeting, their board members are hesitant to ask, and other stumbling blocks. The important thing to remember with personal solicitations is to start with people you know, at whatever level of giving is appropriate for them.

Example: In 1992, the Center for Anti-Violence Education in Brooklyn decided to raise money from major donors (defined as gifts of \$100 and up). Unable to reach their rather modest goal of \$5,000 that first year, they were discouraged. They felt they didn't know enough people to ask and that the board members and volunteers who had agreed to participate in the campaign did not follow through in a consistent way. Nevertheless, the staff decided to keep trying. They arranged for more training for the board in asking for money, recruited board members more experienced in solicitation, and continued to ask their most loyal donors (numbering fewer than 50) to give larger and larger gifts and to suggest names of other people who might be interested in their work. Now, seven years after embarking on their first major donor campaign, they have 250 donors giving \$100 or more, and expect to raise \$45,000 in 1999 from individual contributions.

Personal phone call

What it is: "Personal" is what distinguishes this strategy from phone-a-thons and telemarketing. Someone who knows a prospective donor calls them. Because the caller knows the prospect, they are more likely to get through than someone making a cold call, and because this is someone they have reason to believe would be supportive of the cause, they are more likely to get a gift.

Percent of response: 15–20%.

Best use: To upgrade donors, particularly moving people at the \$50–250 level to a higher gift; to work with thoughtful donors who live at a distance from the group and cannot reasonably be visited; to raise large amounts of money quickly.

Comments: Many groups have complained to us that it is difficult to get donors to agree to a face-to-face meeting. People are busy, they don't want to spend the little free time they do have in meetings about their contributions, etc. While sometimes it is the solicitor who is not comfortable asking for a meeting, it does seem that more and more money is being raised without face-to-face meetings. This makes the phone call even more crucial as a way to continue to have contact with donors. Some groups have begun using e-mail in place of or addition to the personal phone call.

Personal Letter

What it is: While we usually recommend more personal contact with donors, either by phone or in a meeting following a personal letter, it is possible to generate large amounts of money from a well-written and personalized letter. It is the relationship between the person writing (or signing) the letter and the prospect that is key to the success of this strategy.

Percent of response: 10–20%.

Best use: A low-key way for board members, staff, or volunteers to ask friends and colleagues for gifts; useful for getting donors known to someone in the organization to renew their gift; occasionally useful for upgrading donors.

Example: The National Center for Youth Law in San Francisco increases its giving from individual donors every year through personalized letters. In 1992, they raised only \$2,000 from individuals. Last year, they raised \$200,000, with one gift of \$75,000 leading the way. One clue to this success is that the executive director attaches a personal note to every solicitation that goes to a donor who has given before—currently 500 donors—as well as to other people, not yet donors, whom he knows personally. The real key is the fact that this director is on first-name basis with at least half of his organization's donors. Though he spends little time in direct fundraising with these donors, he is in contact with them throughout the year on the work of the organization. His note on their annual appeal is a reminder of this personal relationship, and they respond.

Strategies not requiring personal knowledge of the prospect

Door-to-Door Canvass

What it is: Volunteers or paid canvassers go door-to-door in designated neighborhoods, asking people to become members of an organization or to simply give a contribution. The solicitors don't usually know the people whose doors they are knocking on, which makes the rate of response relatively low. However, because a certain percentage of people will answer the door, the solicitors have an opportunity to engage people face-to-face in a way that is not possible with writing or phoning the same group of people.

Percent of response: 15%.

Best use: In combination with an organizing drive, so that people are asked to sign a petition or express an opinion as well as give money. Although you may get more gifts than from a phone-a-thon the gifts received are often very small and usually not repeated.

Phone-a-thon

What it is: A group of people are recruited (or hired) to come together over several evenings to work through a list of prospective donors. The prospects are people who have not given before, but can be expected to be interested in the work your organization does. (These names are often gotten by exchanging mailing lists with groups doing similar, though not directly competing, work as yours, or by renting lists of people who, because of their affiliations or other giving history, would be expected to be interested in your work.) Usually an office with a large number of phones donates their space for these evenings, so that anywhere from 8 to 20 people can be calling at one time. The point of the calling is to reach people (not answering machines) who are willing to speak to you for a few minutes so that you can elicit their interest in your cause and ask them to make a pledge. (See "Revisiting the Phone-a-thon," by Kim Klein in the *Journal*, Vol. 18, No. 2, April 1999.)

Percent of response: 5%.

Best use: Reaching large numbers of people with a message they can respond to immediately; good training in how to ask for money more personally; can raise a large number of small and medium-sized gifts quickly. Works best when the organization is set up to take gifts made with credit cards.

Direct Mail

What it is: This is an acquisition mailing, whose purpose is to get new people to become donors to your organization. People are targeted who have not given before but, as with the phone-a-thon, can be expected to be interested in the work your organization does. The same letter (that is, it is

not personalized) is sent to a list of 200 or more people by bulk mail (200 is the minimum number of pieces you can send to qualify for bulk discount from the postal service).

Percent of response: 1%.

Best use: Acquisition of donors. Because direct mail often costs more or as much as it brings in, it is used as a way to reach hundreds or thousands of people with a consistent message, and to convert some of those people into donors.

Comments: Because of the expense and risk of direct mail, we recommend that it be used after you have asked everyone you possibly can through the more personal strategies. When you have asked staff members, board members, volunteers, members, and current donors for names of people they think may be interested in giving, and have asked all of them for money, you may indeed run out of prospects. Direct mail is a way to reach people you have no other way to contact.

Special Event

What it is: A special event gathers a group of people to do something fun, entertaining, and/or educational, with the goal of building and strengthening your donor base. This is probably the best known, and most poorly used, of all grassroots fundraising strategies.

Special events are an important strategy for meeting goals other than fundraising, including gaining publicity for your organization, getting people together to build a sense of community in the organization, introducing new people to your work, and raising money from sources you might not otherwise have access to.

Percent of response: Varies by event.

Best Use: To generate publicity and visibility for your organization. In addition, depending on the event, it can be used for acquisition, retention or upgrading of donors. (See "The Correct Use of Special Events," by Kim Klein in the *Journal*, Vol. 18, No. 1, February 1999.)

Comments: The most successful events actually combine strategies described above. Personal solicitation and personal phone calls are made to current and new donors and to local businesses to ask them to help sponsor the event with a donation. An invitation is mailed and follow-up calls are made to get the highest turnout possible. Because of the huge amount of time needed to produce an event, and the risks involved of committing resources before money is raised, special events are not always the best strategy to choose, especially for organizations with small numbers of staff or volunteers.

Example: One kind of special event that requires a lot less time and people-power is the tried-and-true house party. At a house party, the host invites friends, neighbors, and colleagues to their home to learn about the organization,

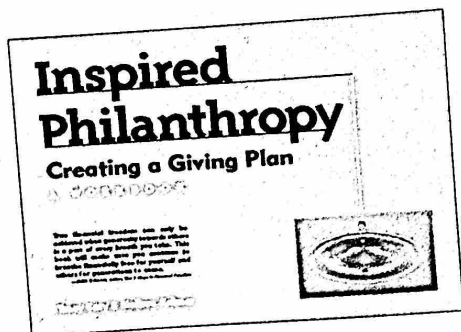
have something to eat and drink, and be asked to make a contribution. There is generally no obligation to give, but people know in advance that they will be asked for money.

Asian Immigrant Women's Advocates often asks its supporters to host house parties as a way to expand their donor base beyond their membership of low-income immigrant workers. In 1997, 35 people attending a house party in Berkeley in honor of the host's birthday contributed \$1,200 in donations to AIWA in lieu of birthday gifts. The host sent all the invitations, got all the food (and paid for it) and wrote all the thank-you notes for the donations. The staff of AIWA merely had to show up and give a short talk about their work. Now, almost three years later, one-third of those donors are still giving to AIWA in response to annual mail appeals. In this case, the house party was used as a way to acquire donors, who were then retained through a personalized mail appeal each year.

Making the Impersonal More Personal

All of the impersonal strategies yield a higher percent of response and get larger gifts when they are used with people who have given to your organization before. Rates of response vary, but generally a phone-a-thon to people who are current givers will yield upwards of 15% response; direct mail to current donors will yield 10% response on any one mailing, and over the course of a year, about 66% of your donors who give one year will give the next year.

Learn How to Match Your Giving with Your Values



If you want to change the world, you'll want to read *Inspired Philanthropy*.

No matter how much or little you have to give, learn how to create a giving plan that will make your charitable giving catalytic. Then, through clear text and substantive exercises, learn how to align your giving with your deepest values—to help bring about the very changes you want. A perfect gift for donors!

\$20

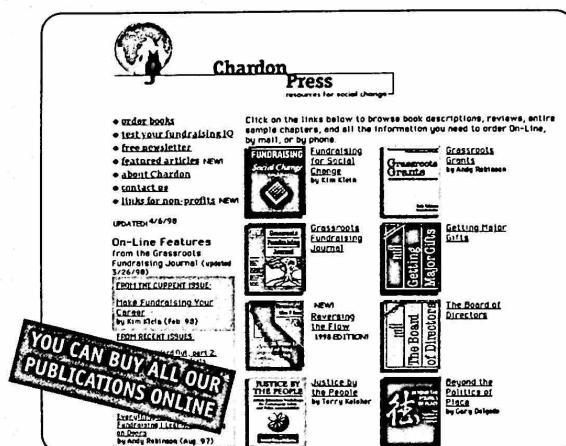
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The important thing to remember is this: No fundraising strategy will work if used exclusively. All fundraising strategies should be used together. The purpose of acquiring donors is to be able to ask them again, and get them to give year after year, and the purpose of doing that is both to have a large number of loyal donors, and to identify a group of those loyal donors who will be asked for very large gifts in person. **GF**

Kim Klein and Stephanie Roth are publishers of the Grassroots Fundraising Journal.

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Articles by Kim Klein, Stephanie Roth, Maria Gonzales, Dave Fleischer and Lucy Grugett Translated by Norma Del Rio



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\$12

Budgeting for Planned Giving

You put gas in the tank to run a car, don't you?

by David Schmeling

Many years ago, after I got my first car and became solely responsible for the upkeep and maintenance of this prized possession, I ran out of gas a few times. I commented to my father on this obvious automotive shortcoming. His response — “Well, son, cars don’t run on air. You have to put gas in the tank” — taught me a valuable lesson: you get out what you put in. Nothing comes from nothing.

Carrying forward this analogy into the world of professional fund development and planned giving, we can say that you will only receive results from your planned giving program in direct proportion to the investment of time and budget dollars you put into it.

Executive directors need to be convinced and board members need to understand that budget dollars must be allocated to planned giving. Planned giving must be a separate line item in the overall development budget. The organization can’t just say, “Well, if there is anything left over we’ll spend it on planned giving.”

This is the “sticky” part of starting a planned giving program: we are asking for budget dollars for a fund development program for which there may be no immediate return.

Board members who vote on these budget items need to understand and accept that dollars put into the planned giving budget are a long-term investment in the organization’s donors. In approving the planned giving budget, board members will essentially be saying that, if the organization positions itself as wanting and needing planned gifts from the estates of donors who believe strongly in the value of the organization’s mission, and shares with its donors how they can make these unique gifts, then these donors will respond in a positive way.

Preparing the planned giving budget is also “sticky” because there are so many variables:

1. How many donor households will you be identifying as your primary market? These are those Category A donors who have met the criteria of being the most receptive to planned giving cultivation. They have demonstrated a high degree of awareness and acceptance of the organization’s mission. These are the people on whom the major portion of the planned giving budget will be invested.

2. What do you plan to do to build planned giving awareness among your secondary and tertiary markets? These are the people who didn’t quite make Category A but who have potential. There is a saying in fundraising, “You never know where your next major gift is coming from,” and this is especially true in planned giving. Everybody within the sphere of your organization’s marketing efforts should be made aware that your organization needs and wants planned gifts.

3. How many allied professionals do you intend to cultivate? These are the people to whom your donors go for counsel and advice. They need to know that you are willing to work with them in serving their clients and your donors in the area of charitable gift planning.

4. How much further education and training will you need to raise your comfort and confidence level so that you can work successfully with your donors? Growth in planned giving is an on-going process. After 20 years, I am still going to conferences and buying books and newsletters on the subject.

Three Things to Remember

There are three things that should be kept in mind as you prepare the budget:

1. It is better to start out small and grow than to start out big and fail. There have been too many instances where someone in a charitable organization has “discovered” planned

giving, thrown together a large mailing list and then, when not enough responses were generated for the dollars spent, the program was dropped entirely.

2. The most expensive portion of the planned giving budget is not materials. It is you, the fundraiser, your time and your talents. Therefore, it is not cost effective for you to create your own newsletters and brochures. Most development people have neither the time nor the skills to create their own materials. The most economical and practical choice is to use the printed materials offered through resource companies (see box). Your precious time is best spent talking with donors.

3. The most important part of the budget is person-power. If you're not able to satisfactorily follow up on the responses or have a qualified person do this for you, then the dollars should never have been spent on the program in the first place. Therefore, sufficient budget dollars should be allocated for you to attend training seminars and set time aside from your other fundraising responsibilities to study and make calls on prospective planned giving donors.

Materials

Fewer dollars will have to be budgeted to cultivate your secondary and tertiary markets than for your primary markets. However, these markets still deserve proper attention and quality materials. Very often these are the people from which some of your largest planned gifts may come. Since these people also represent the pool from which you will draw prospects to place under the more overt cultivation of the primary market, these prospects definitely should not be neglected.

The following types of materials are available from resource companies serving the planned giving market:

Planned Giving Newsletters. This will be the most expensive budget item of your program, but a necessary part of the exchange. A rule of thumb is to budget \$2 to \$4 dollars per year per Category A donor household. Using these newsletters to educate your donors and motivate them to consider remembering your organization through a charitable gift plan is a key element for success.

Most resource companies recommend sending a newsletter four times a year on different topics. Why four and not three or five? Three seems to be too few—people may forget that this is even part of your development program; and five seems too many—donors don't want you to spend too much money on them.

The topics for the newsletter should be geared to the sophistication level and interests of your donors. For most groups I recommend beginning with such basic topics as wills, life insurance and gift annuities, then advancing to the more sophisticated plans, such as trusts and estate planning.

Informational brochures. These are the tools by which the

RESOURCES

The following services provide both consultation on developing planned giving programs and materials such as newsletters and brochures to educate your members and prospects about their planned giving options.

Deferred Giving Services. Planned giving audit for new programs, affordable newsletters, stock and customized brochures, board presentations and staff guidance, seminars for donors. Phone consulting agreements only. (630/682-4301)

The Ford Thompson Company. Newsletters, booklets, brochures and a wide variety of other services for cultivating donors. (770/419-1652)

Phil Converse & Associates. Program design, implementation and evaluation; technical assistance with individual gifts; marketing plans; donor, volunteer and trustee seminars; gift annuity registration; newsletters, brochures, consultations and training. (800/421-5667)

Planned Giving Services. Program design, implementation and evaluation; technical assistance with individual gifts; marketing plans; donor, volunteer and trustee seminars; gift annuity registration; cross-border gifts (Canada & US). (206/329-8144)

Caswell/Zachery. Marketing and consulting services for fundraising, including premier seminars on the how-to's of planned giving for both beginners and advanced officers. Key are their Table Top Presentation Maker and Reference Manual (300 pages). (800/972-3187)

R & R Newkirk. Promotional programs, consultations, training, newsletters and brochures. (800/342-2375)

Robert F. Sharpe & Co. Program design, implementation and evaluation; technical assistance with individual gifts; marketing plans; donor, volunteer and trustee seminars; newsletters, booklets and brochures. (800/238-3253)

Planned Giving Resources. A telephone consulting service. Specializes in assisting charities in establishing and managing gift annuity programs that comply with state regulations. (703/799-8300)

Planned Giving Specialists, Inc. Program design, implementation and evaluation; technical assistance with individual gifts; marketing plans; donor, volunteer and trustee seminars. (718/338-1766)

secondary and tertiary markets are cultivated. The brochures should be attractive, easy to read, relatively brief and highly identifiable with your charitable organization. Following are some suggested topics:

- *Charitable Giving Opportunities*, in which the general concept of planned giving is explained and the most frequently used gifting arrangements are briefly outlined.
- *Wills or Charitable Bequests*, which represent the vast majority of the planned gifts made to American charities.
- *Charitable Gift Annuity*, the charitable retirement plan for the donors of smaller planned gifts.
- *Pooled Income Fund* (if your organization offers one), another lower gift opportunity for donors.
- *Charitable Remainder Trusts, the Split-interest Trusts, the Unitrust and the Annuity Trust*, what they have in common, what makes them distinct from each other, and the benefits for donors who use them.
- *Life Insurance*, the gift that starts out small and ends up big, and its unique uses.
- *Gifts of Appreciated Property*, the tax-wise way of giving because it includes avoidance of long-term capital gains tax.
- *Endowment Giving*, the satisfaction received by the donor as s/he becomes part of the organization's outreach "in perpetuity."

The brochure is the "broadcast" piece of the program. In comparison to the newsletter it is relatively inexpensive. These are used as response pieces to the marketing through direct mail, as inserts in thank-you letters, as response pieces to planned giving articles, as handouts at financial and estate planning seminars, and as pieces available in tract racks in high traffic areas.

Affordability. If you are like most nonprofit organizations and have to watch closely every dollar you spend, then you will need to be frugal in how you spend budget dollars for planned giving if you want your planned giving budget approved for next year as well. Your planned giving pro-

gram doesn't have to cost an arm and leg if you use a little common sense and shop around for a resource manager who will be willing to work with you in starting small and growing as the validity of the program is demonstrated.

While everyone likes lots of customizing, personalization, pictures and multiple colors, buy what you can afford. If the newsletter is generic with no personal masthead, that's OK. Remember, the newsletters are coming to your donors in your envelope with a letter on corporate stationery signed by someone they know, like and trust. What is important is that the newsletter is readable, understandable and elicits a response for further information.

Brochures don't need to be multi-colored and full of pictures. They are meant to answer one, maybe two questions for donors, and then open the door for you to offer your assistance in including your organization in their estate plan through the planned gift arrangement that suits them best.

Finally...

Planned giving is like everything else you do in fundraising. It takes money to raise money, so don't try to run your program "on the cheap." In the long run, a planned giving program is the most economical program in your overall development plan. Nationally, it is estimated that it costs 10¢ to raise \$1 in planned gifts, and that the average planned gift is \$10,000+. With returns like these, it is clear that a well-managed planned giving program is worth the time, effort and budget dollars you will invest in it. **GFJ**

David G. Schmeling, CFRE, consults on planned giving through his firm, Deferred Giving Services, in Wheaton, IL. He is the author of Planned Giving for the One-Person Development Office: Taking the First Steps and Creative Stewardship for the Local Congregation, both available through Chardon Press at www.chardonpress.com.

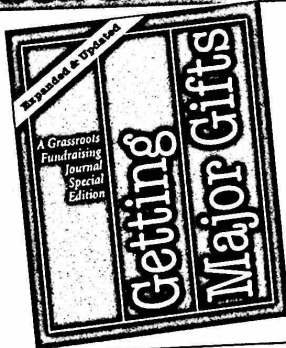
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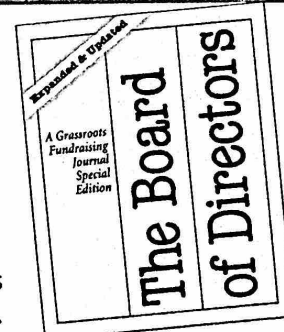
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Hiring a *Fundraising Consultant*

by Kim Klein

There are times in the life of almost every group when a fundraising consultant can be helpful. These times are characterized by one or more of the following situations:

1. You need someone with skill and knowledge who cares about the issues your organization is concerned with, but is far enough removed to have perspective on how your organization can improve its overall fundraising or some particular aspect of it.

2. You need help deciding on a course of action: Can you really launch a capital campaign now? Would direct mail be a good strategy to explore?

3. You need someone to carry out a time-limited task: run a special event, train the board in fundraising, plan a major gifts campaign, design a direct mail program, write a grant proposal.

4. You need someone one day each week or month to help design a work plan, provide guidance and be available to answer questions for your bright, energetic but inexperienced fundraising staff.

5. You are between staff and need someone temporarily to run the development function of your organization.

Consulting is characterized by being time-limited. You can hire a consultant for a few hours a week, a few days a month, or contract for a number of months. A consultant does not usually get involved in carrying out day-to-day fundraising operations. She or he is generally employed to give advice and guidance.

It is partially because of the latter that the idea of hiring a consultant carries a negative meaning for many people. The jokes, "A consultant borrows your watch to tell you the time," or "free advice for a price," are said only half in jest.

The problem is compounded by the sheer number of consultants working in the United States. There are sleazy and unreliable consultants in the fundraising profession, but a more common problem with consultants is that many have little knowledge of their professed subject.

Sometimes people call me to ask how they should go about becoming consultants. When I ask what experience they have had, they respond with a list of the books they have read and the trainings they have attended. They think consulting would be exciting because one travels a great deal and gets to know a wide variety of nonprofits. Further, consultants do not carry the ultimate responsibility for the

fundraising success or failure of any organization.

What my inquirers fail to see, however, is that consultants carry a different level of responsibility: the advice we give must be correct. If implemented, it must work. Further, by being hands-off, consultants must trust others to carry out plans that the consultant designed. This means the plan must be communicated very clearly, and must be designed at the level of skills and resources the people carrying it out have, or have access to.

Consultants must know what can be learned by teaching, guiding and giving advice, and what can only be learned from experience. They must know what they can do for an organization, and what an organization can only do for itself. Here is a list of the kinds of activities fundraising consultants can and cannot do.

Consultants can:

- Train and motivate people in all aspects of fundraising.
- Create fundraising plans and help implement and evaluate those plans.
- Research prospective donors (individuals, corporations, foundations, religious institutions), and write proposals if needed.
- Set up a data base for keeping track of donor information
- Conduct feasibility studies.
- Conduct direct mail campaigns, including acquiring lists, designing the package, tracking results, and sometimes producing thank-you notes.
- Help board members understand their responsibilities, and help organizations recruit and train good board members.
- Study and recommend structural changes in an organization to improve functioning and fundraising efficiency.
- Help hire fundraising staff, including writing job descriptions, advertising, and interviewing candidates.
- Organize special events.
- Set up any other fundraising strategy that an organization has decided to use.
- Manage mailing lists and donor information. This can include sending out pledge reminders, thank-you notes, and renewal letters. (Generally, it is not cost effective for small organizations to pay a consultant to do these tasks).

Fundraising consultants cannot:

- Actually solicit money from individuals, unless they go as

part of a team with someone from the organization.

- Use their personal contacts to raise money. Consultants often know a great deal about wealthy givers in the community and, with discretion, can share that knowledge in prospect research. However, consultants do not go from job to job with their own list of prospects. Most of the time consultants do not actually raise money. If a consultant offers to do all your fundraising for you, run the other way. This is not an effective solution because, at best, it postpones the necessity of getting the board, staff and volunteers involved in fundraising.
- Guarantee their work. There are no absolutes in fundraising. There is a body of fundraising knowledge (largely based on common sense) and there are many applications of this knowledge. No strategy will work every time for every group.

How to Choose a Consultant

Once you have decided that your particular situation may be helped by a consultant, what do you look for in that person?

1. Track Record. Ask how much fundraising he or she has done, and with what success. Has the person worked with organizations similar to yours both in purpose and strategy, and in similar locales? A successful consultant for social change groups in Manhattan may be less useful for rural advocacy groups in North Dakota. Superb consultants for large institutions may not be as good with all-volunteer operations with budgets of less than \$25,000. If questions of gender, sexual orientation, race, class, or disability are very important in your organization, ask the consultant what experience they have working on these issues as well, or with diverse groups of people.

2. References. If you don't know the person by reputation, ask for the last three groups she or he has worked with. Then call those groups and ask about the consultant. Was the person helpful? Did the consultant listen well and really understand the situation? Would this group hire this consultant again? You can also check references, but you may get a more candid evaluation from non-reference groups.

3. Compatibility. If you envision a relationship with the consultant involving more than a one- or two-day training, you may wish to meet the person. This meeting, which should take about half an hour, should be free. You then get to see if you like the person and would feel good taking his or her advice. It sometimes happens that an excellent fundraising consultant is not the right person for your group because the personalities will not mesh. If the organization dislikes the consultant, both their advice and your money are wasted.

4. Confidence. Ask what the consultant will do for you, or what they recommend. Avoid asking for long written plans. Elaborate "work plans" or proposals are often standardized, with the name of your organization substituted for the name of the previous organization. You can ask for a

resume, if you find that helpful. By the time of this meeting, you are not looking so much for proof of fundraising knowledge as for ability to put that knowledge across. Ask yourself, "Is this person believable?" "Does she or he convey confidence, enthusiasm and good will?" "Will the people who have to work with this person like him or her?"

5. Belief. Finally, the consultant must be able to articulate the mission of your organization and believe that your group should exist. The consultant does not have to be a donor to your group, and does not have to think that your group is the greatest idea since sliced bread, but he or she needs to care about what you stand for and want to help you out of conviction as well as needing a job. This is particularly important if your group is controversial or has a "troublemaker" image. Avoid consultants who advise you to "tone down" your message or broaden your goals "to make everyone feel included." A fundraising consultant's job is to help your group raise money — not to water down the group then help this newer, lightweight group raise money.

Paying Consultants

There are no standards or guidelines for how much to pay a consultant. A high price does not mean better performance or more accountability, but a price that is too good to be true probably is. By hiring a consultant, you are investing in the present so you will have more money in the future.

Most consultants charge by the day or by the hour, but some charge by the job. The daily rate is less per hour than the hourly rate, and several days is less per day than one day. Consultants also charge for all their expenses: hotels, meals, telephone, photocopy, and travel are the most common. You may be able to cut some of these costs by offering to house the consultant in someone's home and providing their meals.

Establish clearly just what you are paying for. For example, you pay for the consultant's time. But when does that time start? In some cases, the time starts when the consultant reaches the office of the client or the training site. Even if it takes a day to get there, they do not charge until they are there. Other consultants start charging the minute they leave their house or office. Find out if the consultant charges for phone calls, and at what rate.

If you are hiring a person for several days or months of work, build in evaluation points. For example, you might say, "At the end of one month, we will evaluate progress and decide whether or not to continue, or whether the plan needs to be modified." This is best for the consultant also, who may need to re-estimate the time involved, or may have run into some unforeseen obstacles. It is important to have a written statement spelling out your understanding of the consultant's role, fees and expenses, which you both sign. **GFI**

Excerpted from Fundraising for Social Change, Third Edition by Kim Klein. For ordering information, see page 15.

Staffing



When Everyone is a *Volunteer*

by Kim Klein

Thousands of very successful organizations are run entirely by volunteers. Service clubs, volunteer fire departments, PTAs, and neighborhood organizations have no paid staff. Many of these organizations have run successfully for years. They are designed by volunteers and designed to be run by volunteers. Other organizations may prefer to have paid staff but cannot afford them, so they, too, run on the energy of volunteers.

If you are such a group, here are five pointers:

1. Volunteers should think of themselves as unpaid staff. Staff people have jobs and tasks for which they are accountable. Volunteers have the same obligation as paid staff to do what they say they will do. Similarly, no one should tolerate incompetence and lack of follow through from a volunteer any more than they would from a paid person. In a group where everyone volunteers, it is really important to create an environment where people do the work they say they will do.

2. Volunteers have lives beyond the organization. They should not be encouraged to take on more work than they feel they can do. Suppose you know that Mary Jones would make a great treasurer but she says she hasn't got the time. You talk to her several times, beg her, tell her that no one else can do the job but her; finally she agrees to do it. Don't be surprised when Mary turns out not to be as good a treasurer as you had expected. As part of respect for each others' time, it is imperative to create and support an organizational culture that encourages people to finish the tasks they take on, even if that means taking on fewer tasks. Also, some people have more time than others and so some people may be able to take on more work than others. This needs to be all right in the group and people with less time must not be made to feel that they are not doing enough if they don't put in as much time as those with more time.

3. Volunteers should use their own and other people's time respectfully. Meetings should start and end on time. A facilitator or the chair of the meeting or the group as a whole should agree on how long each agenda item will

take and try not to take longer than that. There is usually more to say, and one more way of looking at things, but unless you are an academic think tank, you can't explore every possibility.

4. People should take on particular responsibilities. Someone should be the treasurer, someone should prepare the agenda for meetings, someone should be the chair. Organizations working in a collective model can rotate these responsibilities (which need to be rotated occasionally anyway). The group should not have to wonder "Who is in charge of filing our 990?" or "Who has the checkbook?"

5. People should be particularly careful about writing things down. Turnover in all-volunteer organizations is often high, and knowledge gets easily lost, particularly if there is no office or central place to keep files. If you do a special event or a direct mail appeal or write a proposal, keep track of everything someone else might want to know about it in order to do it faster and easier the next time. Preparing reports and narratives for the use of people who will come after you is the best way to ensure that your organization can continue to function well using volunteers and, in fact, helps to ensure that your organization can grow.

6. Volunteers should constantly seek to expand the number of volunteer workers. There is so much work to be done that a few initial dedicated volunteers will burn out quickly. You should be drawing new people into the organization all the time who can help share the work and broaden the organization's thinking and its access to funds.

All-volunteer organizations are not that different from many grassroots organizations that have one or two paid staff people. In fact, in many grassroots groups there are two kinds of staff — low-paid and unpaid. In all other grassroots groups there is one kind of staff — unpaid. The work is still valuable and people's time is very valuable. Keeping these pointers in mind will ensure that your organization is able to do the useful and important work it has set out for itself. **GFP**



CONNECTING WITH *Corporate Giving*

Fistfuls of Dollars: Fact & Fantasy about Corporate Charitable Giving

by Linda M. Zukowski

EarthWrites / 196 pages / Hardback / \$14.95

Reviewed by Charlie Fernández

Linda Zukowski begins her book, *Fistfuls of Dollars*, with an epigraph from Winston Churchill: "We make a living by what we get, but we make a life by what we give." These words are particularly ironic, given the book's focus on corporate charitable giving and the fact that it routinely represents the smallest share of all charitable giving—just 5.6% in 1996, even less than the 6.9% left by dead people in their bequests!

Be that as it may, Zukowski's purpose in *Fistfuls of Dollars* is not to offer a critique of capitalism and corporate philanthropy. The corporate sector's small share of charitable giving still amounted to \$8.5 billion in 1996, and Zukowski's aim is to help nonprofit organizations better understand and navigate the corporate charitable giving process so that they can secure some of that funding to support their work. *Fistfuls of Dollars* succeeds admirably at this goal.

Drawing on her twelve years in corporate management and her subsequent work consulting with nonprofit organizations, Zukowski interviewed 37 major corporations—from AT&T to Weyerhaeuser—about their charitable giving. The book is based on the findings of Zukowski's research and the concrete advice of those corporate officers responsible for reviewing proposals and making funding recommendations.

Fistfuls of Dollars illuminates the unique aspects of the corporate charitable giving process. Zukowski points out, for example, that the biggest single factor affecting corporate funding is the business environment—a merger may dramatically alter a company's giving, and a deep recession will seriously restrict funding altogether. It's also important, Zukowski points out, that nonprofits understand the motivations behind corporate giving: unlike foundations, very few companies give only for purely altruistic reasons. By the same token, Zukowski writes, corporate giving is not motivated by the hope to win influence or gain brand expo-

sure and recognition as often as we might think. Corporations generally assume that recognition for a gift and public display of a logo are part of the business transaction that the donation represents, and not reason enough, in most cases, to make a contribution.

The motivation most often cited behind corporate charitable support by those in Zukowski's research was the development of strategic partnerships between companies and nonprofit organizations in which both benefit. These strategic partnerships balance the desire to do something good in the community with the need to demonstrate some type of return to investors by making a donation. In other words, Zukowski writes, there has to be a business reason for making a contribution—for example, a computer company donates hardware to schools in order to help educate children, make them computer-literate and hence develop a future customer base. Understanding what a company is seeking to accomplish with its charitable giving allows a nonprofit group to underscore the connection between its programs and the company's strategic interests. Zukowski recommends, however, that you focus on why funding your organization is a winning investment, and let the company figure out how well your work fits in with its strategic interests.

The book includes other chapters clarifying how companies select funding areas and make funding decisions, illuminating the role of personal connections with corporate funding representatives, and reviewing the basic components of funding proposals, budgets and other financial statements.

Fistfuls of Dollars is full of helpful insights, and it represents a very good investment of your own. Zukowski also offers workshops that succinctly summarize her book's findings and recommendations, one of which I attended and found very helpful. Zukowski is president of EarthWrites, a consulting firm specializing in environmental and Native American issues.

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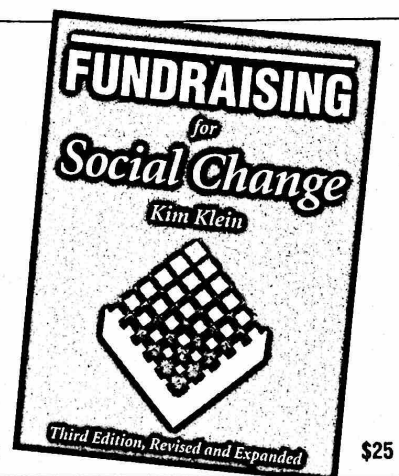
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