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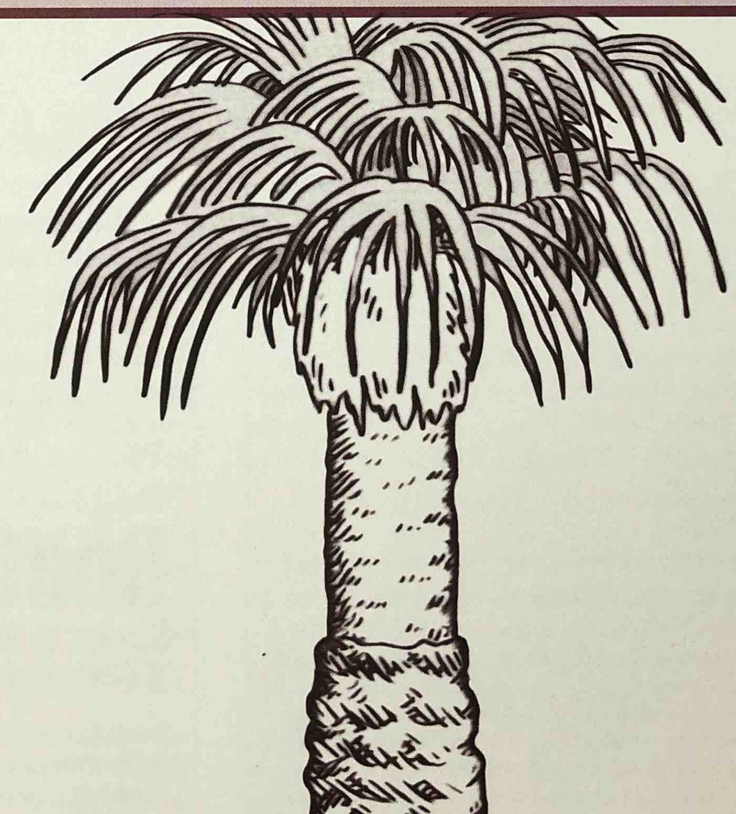
Grassroots Fundraising Journal



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Edited by Taylor Root

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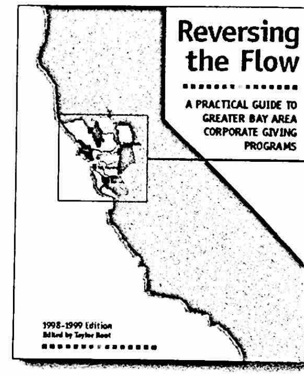

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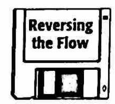

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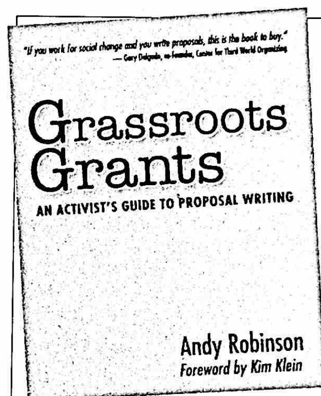

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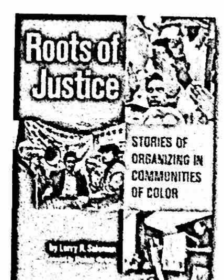
Roots of Justice

Stories of Organizing in Communities of Color

BY LARRY SALOMON



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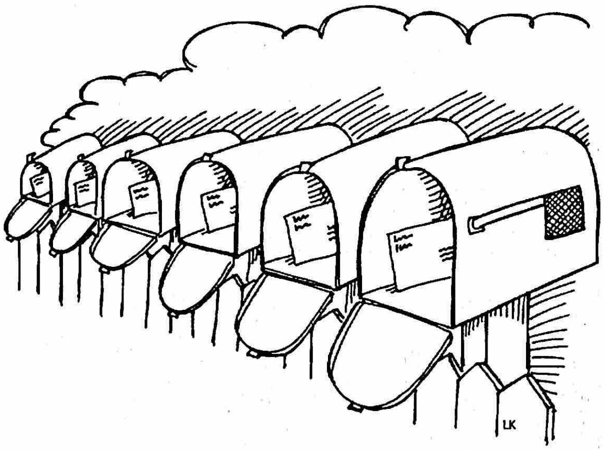


Building a Donor Base with Personal Letters

By Dan De Vries

We all know from the how-to books, the articles printed in terrific journals like this, and the talks and roundtables for which development officers and other nonprofit managers gather, that the most effective way for a charitable organization to raise money from individuals is to ask them personally for gifts.

When I took my present position as Director of Development at the National Center for Youth Law (NCYL) in 1993, some of the necessary material for building an individual giving program was already in place. The Center's director and a small core of board members were committed to such a program. We also had a prospect list consisting of friends and colleagues of board and staff members, and individuals who had attended the Center's fundraising events (the most recent of which had been four years earlier).

At the beginning, NCYL's director and I met with a development committee, which included some board members, and laid plans for a personal solicitation program. We had a training with a consultant in which we did a role-playing exercise about asking people for money. We put together lists of five (or fewer) people whom each committee member would ask personally for a gift.

But, after several months of talking about personal solicitations, only one member of our group, our director, had actually committed someone to a gift. And only one. At that point, I faced the sad truth that we were not very likely to mount a successful individual solicitation campaign beginning with personal calls by our board and committee members.

I don't honestly know whether many organizations with a one-person (or no-person) development staff get their volunteers to make an assigned number of personal solicitations. I suspect that we talk a lot about doing this because we know that if we could do it, we would raise significant gifts. I think the people who actually succeed at it, however (and make the rest of us feel guilty because we don't), are major gifts officers whose primary responsibility is to identify and cultivate individual prospects. Those people tend to work for large institutions, rather than grassroots organizations.

Very few of the rest of us can hope to devote the amount of time necessary to building relationships with enough volunteers to drive an organized, comprehensive personal solicitation agenda. I, for example, spend most of my time on grantseeking and reporting. I also do a certain amount of program and public information work. Even though I would prefer to be working on individual giving, I actually spend less than a third of my time on it.

In my organization's case, there has been a very specific impediment to getting people to make personal solicitation calls. All of our volunteers, and the great majority of our prospects, are attorneys. Without getting too deeply into the sociology of it, there is among the legal community great reluctance to systematically schedule and participate in fundraising calls.

What our first development committee members were willing to do, however, was write notes, sign letters, make informal phone calls, and talk to other members of their law firms outside the formality of a solicitation call. In other words, they were willing to communicate as they do in their ordinary business life regarding everything besides matters of great significance in a legal case. Once it became clear that this was the circumstance with which we would have to work, it made more sense to work with it than to complain or fight about it.

Relating to Writing

One obvious fact about the law is that it is written. In fact, law codes are among civilization's oldest written artifacts. Attorneys use and pay attention to writing. Even though we at NCYL didn't make a conscious decision to rely increasingly heavily on writing to get our message across to our prospects, at some point it must have dawned on us collectively that writing was the appropriate means by which to communicate with them.

It also dawned on us that our writing for fundraising needed to be as personal as possible, particularly when we were dealing with prospects who knew our director, or one of our board, committee, or staff members. By personal, I do not mean chummy or colloquial. As closely as possible, we wanted our fundraising communication to be appropriate to each individual to whom it was addressed.

In the beginning we were dealing with a prospect list of about 1,300 names. It is considerably larger now, but even 1,300 names were far too many to enable us to tailor each letter thoughtfully to each prospect. What we could do was compose a letter that was appropriate to the sensibilities of our prospect group as a whole and then add personal touches to as many individual letters as possible.

The character of our basic letter has changed over the six years in which we have been mailing. Our earlier appeals began with stories about individual children who were representative of the groups of children for whom NCYL advocates. However, this approach was slightly disingenuous in that our direct client base is really the lawyers and advocates who work with those children, not the children themselves.

Over time, we have shifted to the less poignant, but more realistic, approach of describing the overall situation facing low-income children and families in this country, and then describing what the Center is doing to try to improve it. We attempt to be clear and concise. There is nothing fancy or flashy about our letters, but I think that as basic communication they are appropriate to pretty much everyone to whom we mail them.

Making It Personal

We supply personal touches to our basic letter in several ways:

1. Notes to "Known bys": Board, development committee, and staff members have all supplied names of potential prospects that they know, and they attach personal notes to our mail appeal letter to those prospects. Of our original prospect list of 1,300, NCYL's director knew about 300 people. He has consistently added notes to the letters to these individuals, added new names to the list, and checked additions to the list from other sources to identify anyone he also knows. Our list has grown from the original 1,300 names to more than 5,000, and the individuals now coded as "known by" the director has more than doubled to 700.

2. Notes to donors: Once a person has made a gift to NCYL, the fact that the person is a donor is mentioned in every subsequent letter we send; the director or another person who knows the donor adds a personal note.

3. Champagne segmentation on a beer budget: In addition to segmenting our list according to "Known Bys" and donor status, we have two other categories of prospects that we treat a little differently, although in a very simple manner. One is the group of people who get our substantive publication, *Youth Law News.* The other is a group we call our alumni: former employees, board members, law clerks, and volunteers. Early in the letters to those groups we include phrases such as, "because you read our publication *Youth Law News,*" or "because you have shared in our work here at NCYL."

4. Envelope presentation: We send our letters first class, and laser-print the envelopes rather than using labels, just as we would if someone at NCYL were mailing the prospect a personal letter about another matter

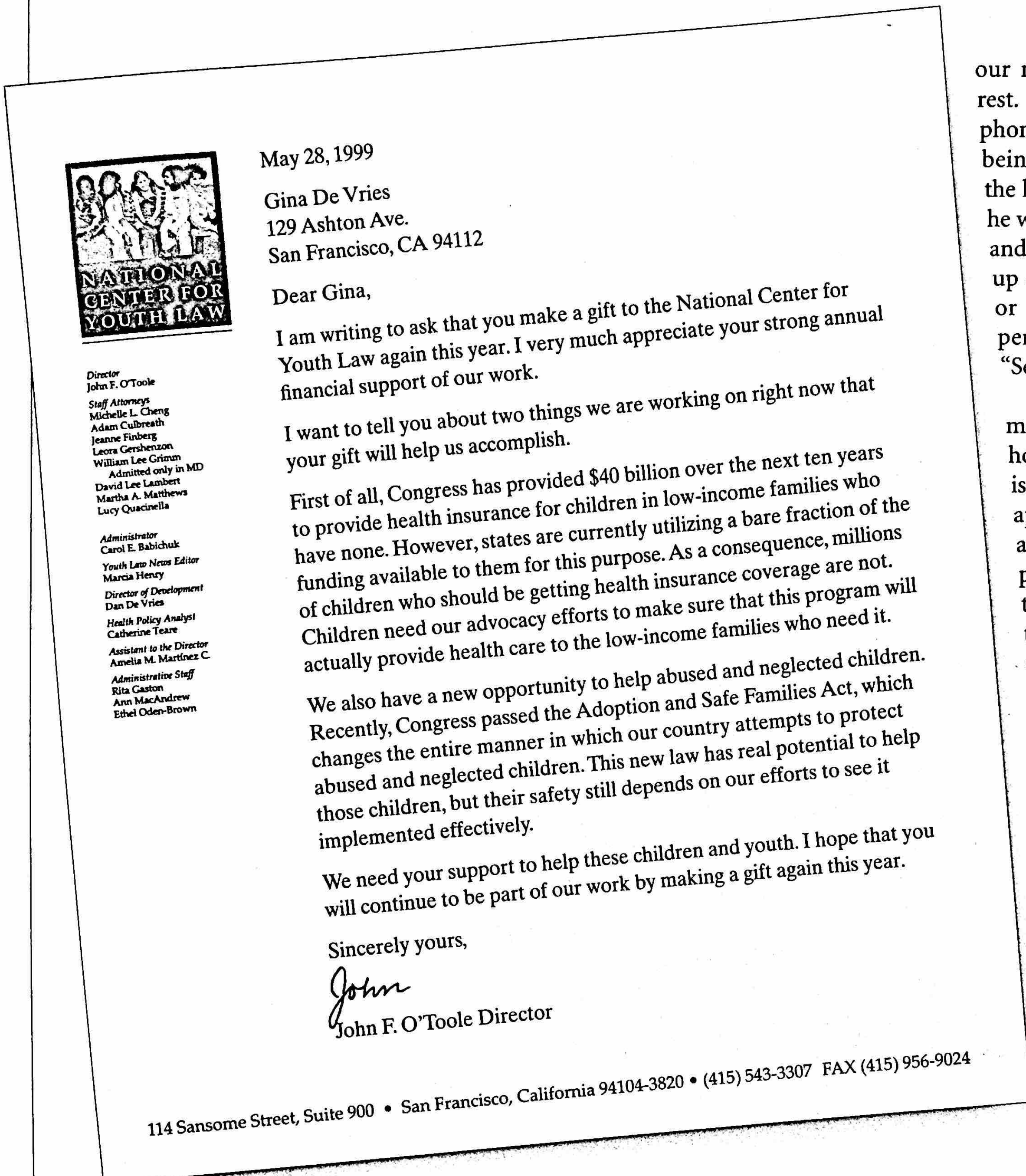
5. Prompt and personal gift acknowledgment: We acknowledge gifts as soon as we receive them, and we mention the gift amount. And, in addition to signing the letter of thanks, our director adds yet another personal note.

We mail twice a year, in early summer and late fall. We do not mail again in the same year to donors who have given in response to our most recent mailing. Over five years, most of our regular donors have sorted themselves into end-of-year donors and summer donors.

Of our current prospect list of about 5,000 names, roughly 2,000 require some personalization, whether a reference to their past giving, or to the fact that they are alumni or *Youth Law News* readers, or because their letters need to get to a board, committee, or staff member for a personal note. (Our director alone adds notes to as many as 500 letters in a given mailing. Our board president adds notes to another 100 or so.) All of these approximately 2,000 letters need to be produced in-house because a mailing service could never keep all the subsets of them straight.

The rest we do send to a mailing house. We generally get a response rate between .5% and 1% on those mailings, which is enough to justify continuing to send them, because the twenty or thirty prospects who do respond for the first time join our growing list of donors and enrich that pool.

The first mailing we did in 1993 brought in gifts total-


May 28, 1999

Gina De Vries
129 Ashton Ave.
San Francisco, CA 94112

Dear Gina,

I am writing to ask that you make a gift to the National Center for Youth Law again this year. I very much appreciate your strong annual financial support of our work.

I want to tell you about two things we are working on right now that your gift will help us accomplish.

First of all, Congress has provided $40 billion over the next ten years to provide health insurance for children in low-income families who have none. However, states are currently utilizing a bare fraction of the funding available to them for this purpose. As a consequence, millions of children who should be getting health insurance coverage are not. Children need our advocacy efforts to make sure that this program will actually provide health care to the low-income families who need it.

We also have a new opportunity to help abused and neglected children. Recently, Congress passed the Adoption and Safe Families Act, which changes the entire manner in which our country attempts to protect abused and neglected children. This new law has real potential to help those children, but their safety still depends on our efforts to see it implemented effectively.

We need your support to help these children and youth. I hope that you will continue to be part of our work by making a gift again this year.

Sincerely yours,

John

John F. O'Toole Director

NATIONAL CENTER FOR YOUTH LAW

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John F. O'Toole

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The brief "personal solicitation" letter.

ing approximately $5,000. In 1994, two mailings raised $14,000. A year later total mail gifts exceeded $20,000. Over the last three years the total has grown more gradually, reaching $27,000 in 1998.

Making It More Personal

As our mail program developed, we never totally gave up the idea of personal solicitation. In the beginning, we developed a list of prospects each year and when it became apparent as the first week of December ebbed away that we were not going to get an appointment to talk to them about gifts that year, our director would telephone some, and we would send our mail appeal letter to the rest. The prospects he telephoned generally ended up being sent some version of the letter in any event. Either he would get their voice mail and send the letter to follow up on the message he'd left, or a prospect reached in person was likely to say, "Send me the letter."

Rather than send our mail appeal letter, which, however we personalize it, is still pretty clearly a mail appeal, we decided to use a much briefer letter to prospects or donors in the $500 to $1,000 range that presumed close acquaintance with, and loyalty to, our Center. We cut the list of donors whom our director would telephone down to a realistic dozen for whom we felt the call was essential. For the rest of our "personal solicitation" donors, we made sending this brief letter to them the first priority of our mail program.

For the last three years, this combination of a one-page letter, several telephone calls, and luncheon dates with two or three people in November and December, has yielded gifts approaching $30,000, in addition to the other gifts we raise by mail. Using this approach, we are renewing our current donors in the $500 to $1,000 range and seeing a certain amount of growth.

Between 1993 and 1998, the total amount of gifts from this combination of mail appeal and personal solicitation has grown from about $8,000 to $53,000. That is good growth, but still not a large portion of our total budget. Furthermore, although the total amount has increased each of the last three years, it has not increased greatly.

What has happened, however, is that gifts from other sources, not necessarily attributable to our mail program or our end-of-year personal appeal, have started to materialize, including new substantial commitments from individuals totalling $75,000 in 1997 and $120,000 in 1998.

One source of this funding was very likely connected to our mail appeal. For the last three years, an individual to whom we originally mailed our standard appeal has directed $15,000 in grants for general support from a family foundation. Also, in 1997, an anonymous donor made a $10,000 grant through a donor-directed foundation. Last year, that grant tripled to $30,000. These contributions may or may not be directly connected to our mail appeal.

The other thing that has happened exemplifies what I think of as the cumulative but somewhat mystical effect of all our efforts. Throughout all of the process I've been describing, we have continued our efforts to involve board and development committee members in individual solicitations where it is appropriate and everyone is comfortable participating.

Two years ago, one of our newer board members accepted the assignment of development committee chair and has seriously dedicated herself to becoming an effective fundraiser for the Center. She developed her own prospect list, which happened to include a married couple whom we had identified as prospects but had never succeeded in approaching. Our board member was able to provide entree to these individuals, and accompanied our director on the first bona fide major gifts call either had ever made. They asked for, and were given, a $50,000 gift. These donors have since become even more interested in the Center's work, and our director talks to them frequently. In 1998 they increased their gift to $75,000.

Although this couple's substantial gifts are not directly attributable to our mail appeal, I know that neither the possibility of calling on them, nor the gifts they have made, would ever have materialized had we not made a long-term commitment to seek gifts from individuals, and carried through on that commitment as best we could given the nature of our program and community. The total financial result of that effort is that giving for general support has increased from virtually nothing in the early 1990s (when NCYL had no individual giving effort) to more than $200,000 in 1998.

In our case, we used the mail, but in using it over the last several years, we have done a number of things that correspond to and lay groundwork for major gifts fundraising. We ask people whom we know. We pay attention to them as individuals, even if only by addressing them personally. And our solicitations focus upon our issues and our agenda.

Clearly, we have not given up on personal solicitation. Having had some success, we are eager to do more when, where and with whom it is appropriate. For the most part, however, the mail remains our primary means for communicating with and soliciting our donors and prospects. Equally important, however, it also provides us with a foundation upon which we can build a major gifts program. GFJ

Dan De Vries is Director of Development at the National Center for Youth Law

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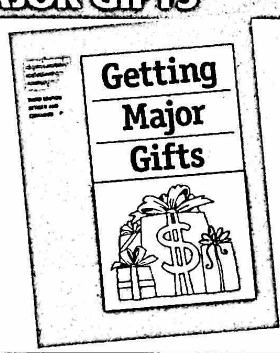

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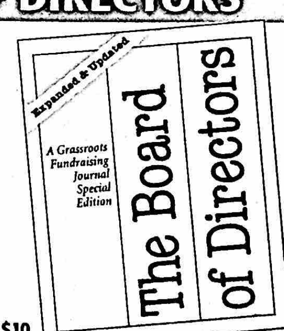

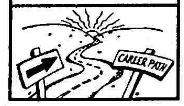

Making the Transition from Organizer to Executive Director:

How I Learned to Stop Worrying and Love My New Job

By Mike Roque

So you just got that promotion you always wanted. You've been an Organizer Intern, a Junior Organizer and, finally, a Senior or Lead Organizer, and the board of directors of WKB (We Kick Butt) has finally named you the new Executive Director. You have your new cards, new nameplate, new (old) desk and new authority — so why are you so overwhelmed and unhappy? You may have been a good organizer, but can you make it as an Executive Director?

I have talked and worked with many good community organizers who have become bad Executive Directors. Why is this?

Organizations often hire and train community organizers in the mistaken belief that there is a career track from Junior Organizer to Lead Organizer to Executive Director. We believe that good organizers can do anything. I have heard people brag about so-and-so, their new organizer, who could probably build a space ship if she put her mind to it, never mind run a little grassroots organization. Yet the pattern of a person going from great organizer to not-so-great Executive Director has repeated itself too many times for me to think that it is just a fluke and not a systemic problem.

The transition from Lead Organizer to Executive Director is similar to the transition from Leader to Organizer. Both require a big shift of roles and the assumption of new responsibilities. Both have the potential to bring quick growth and development to the organization because of the person's familiarity with the organization. And, both have presented many problems for organizations.

Good Executive Directors are expected to have not only great political leadership, passion and drive, but also administrative competence, financial acumen, and time management skills. These skills are often not compatible or complementary. And beyond all this, we want our Executive Directors to be able to manage staff, raise money and provide leadership to the board of directors.

Even under the best of circumstances, transitions are tough. Humans, being part of the physical world, are inclined to take the path of least resistance. Think of a transition you have faced recently either in your job or personal life, and the uncertainty and uneasiness it brought. You were forced to move away from a sense of comfort to something unknown. You may have been eager to face new challenges but you also had to be willing to let go of things that you were good at.

Transitions are tough on organizations, too, especially the transition to a new Executive Director, the most important paid position within an organization. This person can lead the organization to new heights or destroy it. Transitions are tough on the staff and volunteers, too, as they have to go through the process of building new relationships. And, they are tough on the new Executive Director, who will be closely scrutinized by all internal and external components of the organization.

As I see it, there are five key frustrations that new Executive Directors face. In the rest of this article, I cover each of these challenges:

- **Managing Staff** — You now have to hire, fire, supervise and evaluate your peers
- **Fundraising** — It seems all your time is taken with administrative work or fundraising, and that you don't get to do the fun stuff anymore
- **Time Management** — You are no longer responsible for only your time and work
- **Working with a Board** — You didn't think this part would be so tough
- **Personal Issues** — Your satisfaction becomes tied to more abstract accomplishments

Managing Staff

As the new Executive Director, one of your most critical immediate issues will be building relationships with the existing staff. Whether you have come from within or outside the organization, you will need to earn the trust of the staff. As an internal choice, the dynamics of your relationships with your co-workers will change. You will now have the power to fire folks who were your peers, and you will have to evaluate their work.

Coming from the outside, you must build the trust and confidence of your new co-workers. You realize that your relationships will be influenced, initially, by the relationships the staff had with the previous Executive Director (for better or worse). If the previous director was well liked, you must avoid the desire to try to be the previous director. You must build your own trusting relationships with your new co-workers.

Additional issues may arise from difference in age, gender, race and sexual orientation. Deal with these issues directly and truthfully. Do not allow them to fester and explode in a way that may damage future trust or the organization.

As the Executive Director you will get the opportunity to hire new staff. Try to avoid the new-director temptation to hire people just like you: people who think like you, act like you, work like you, laugh at the same jokes, look like you — in short, people you are comfortable with. Doing so can lead to a lack of diversity in many ways. It is much more important to bring different skills to your staff and stretch yourself to learn to work with people who may not be just like you.

Dealing with staff discord will also be in your new job description. When staff people have issues with one another, rest assured the difficulty will come to you. You will asked to be the mediator of all staff disputes. In doing so, you must set an example of dealing with all staff in a fair way. If you show favoritism to one staff person it will come back to haunt you. Your key resources are your people, but the buck stops with you.

A mistake I see many new Executive Directors make is not delegating work to other staff members. There are many reasons that folks don't delegate, including the following fantasies (and my responses to them):

- **I can do it better myself** — This may be true, but if you want to develop internal capacity you must train others to do the work.
- **They might make a mistake** — They probably will, but that's how people learn.
- **I might lose control** — Good, others will take ownership of the organization and work just as hard as you.
- **I feel threatened when I give up control** — Get over it.

It is primarily the responsibility of the Executive Director to build a positive work environment. Since the Executive Director sets the tone for the work climate, be aware of negative orders and feedback. A positive order is better than a negative one. Ask staff to work on a project, don't command. Allow staff the freedom to do projects their way, even if it's not the way you would have done it. Give both responsibility and authority. As supervisors, we often give responsibility for a project to a staff member but we do not give them the corresponding authority to make decisions when necessary so they can complete the project correctly.

Pay attention to how and when you give feedback. Do you give feedback only when people make mistakes or do you compliment folks when they've done a good job? Be aware of your body language when you talk with staff. Are you constantly fidgeting, looking at your watch or acting disinterested? This is another form of negative feedback.

Managing staff is a difficult process. As liberals, progressives or radicals, we like to believe there are no hierarchies within our organizations. But there comes a time when decisions must be made and it is usually the Executive Director who must make the decision. Even if you are uncomfortable with making staff decisions, as long as you make them in an open and honest way, treat people fairly, and seek input from others you will earn the respect of your co-workers.

Fundraising

One frequent complaint I hear from new Executive Directors is they feel that all they do is fundraise. They are now spending the vast majority of their time in fundraising activities, something they are not always good at or comfortable with. Fundraising also takes them away from the fun stuff they used to do like organizing folks and doing direct actions. Many organizing groups don't often have a full-time Development Director. If this is true of your organization, as Executive Director most of your time will be spent on fundraising.

To keep some excitement in fundraising, think of it as an organizing campaign. One tenet in organizing is, "We build relationships." Similarly, all fundraising is personal and also involves building relationships, whether with foundation or corporate folks or individual donors. I have seen some of the most aggressive, in-your-face organizers become shrinking violets in a room full of funders. But the work has many similarities.

In an organizing campaign, would you submit a ten-page typewritten document to your target and expect them to meet your demands? No. Yet, as silly as this seems, this is what we do with funders and expect them to support us. In fundraising, think of the funder as the target. Do all the research you would do about an organizing target. Who else do they give to? What is their decision-making process?

What is their background? You need to remember that most foundation program officers, even if their programmatic area is organizing, have little knowledge of organizing or may not have been very good organizers (otherwise they might still be organizing). Don't hesitate to push, challenge, educate and *organize* funders.

As Executive Director of a grassroots organization, you can have a major influence on funding decisions of foundations and major donors. You should see in your role an opportunity to educate folks on the principles of organizing. Many funders are struggling to find ways to have grassroots folks involved in local decision making. Organizing is a natural avenue. If organizing groups are not represented on foundation grantmaking bodies or having conversations with major donors, those dollars will go to other groups that are not involving grassroots folks, do not have democratic processes, and are not trying to make systemic change.

Time Management

As an organizer, I could always put in more time to catch up on work. As an Executive Director, I don't have that luxury. Executive Directors need to be more effective with their time. It doesn't matter how much time you're putting in if you're not effective. Also, you are no longer managing only your own time and work, you need to be constantly thinking of all the other staff members' time and work and how they interact.

Every new Executive Director should have a calendar system. Whether you use the fanciest or cheapest calendar system, the important thing is that you open it. You would be surprised by how many people scrupulously write every appointment and meeting down in their calendar, then forget to check it. I recommend you also conduct weekly check-ins with staff to go over schedules for the week and prepare for major activities. These do not have to be long formal meetings, but quick informative sessions are helpful. Another good practice is to conduct regular staff retreats. About twice each year you and your staff should get away from the day-to-day work and do some longer term planning. This is also a good time to check with staff on burnout and job satisfaction.

Here are two general rules in time management that will stand you in good stead:

- One minute of planning saves three minutes of time
- It takes more time than you think to do the things you like, and less time than you think to do the things you don't like.

Working with Your Board of Directors or "Can't we all just get along?"

If there is one area that new Executive Directors underestimate in terms of amount of work it is working with their board of directors. It is surprising that like-minded people can have so many disagreements. New Executive Directors often feel that their board is the worst board that ever existed.

Keep in mind that the transition of Executive Directors is very difficult for board members. They have usually built their loyalty to the previous director and they may be worried about whether they made the right decision in hiring you. But remember, too, that they want you to succeed.

Find out who your natural allies are on the existing board. Who are the folks that are going to support your initiatives? Who are looking to you for leadership? These are your core supporters. You want to build your board around this leadership group and bring in new people who will be loyal to you, but will not be afraid to challenge you.

One mistake I've sometimes seen new Executive Directors make is to want to make wholesale changes in the board as soon as they come on. They want to fire the current board or at least the vast majority of the members. This will lead to much unrest for the organization. A better strategy is to find out who the deadweight is on the board and gradually ease them out. This includes founders when necessary. No need to make enemies when you don't have to. Thank people for their time and build your own board.

Personal Issues

In organizing, you could always tell if you'd done a good job by the number of people at an action, the development of a leader, or winning your demands. But, as Executive Director your satisfaction becomes more abstract and comes from accomplishments that take longer to see. Often, you may not see the fruits of your labor until you leave the organization.

Your problems in the job are both short- and long-term. They include not only whether you have enough money to meet this year's budget, but worrying about funding sources for next year and the following years. You need to consider if you can hire a new staff person before the existing staff gets burned out. Or whether you should continue to rent space at increasing rates or invest in the purchase of your own building. These are just some of the issues that Executive Directors face.

As a new Executive Director it is important that you know your strengths, but also recognize your weaknesses. You will be pushed into a number of jobs that you do not want to do and are not trained to do, yet they have to be done. You will have to pass on things you like to do (and do well) but can't or shouldn't do. You are the vital link up and down the organization. Staff, board, and donors often perceive the organization through the actions of the Executive Director. Don't be afraid to show your weaknesses, admit when you're wrong.

Making the Transition

For the Individual — It means giving up roles you're comfortable with and taking on roles you're not (yet) comfortable with.

For the Organization — It means being financially sound so as to not put undo pressure on the new person and being aware of power dynamics (such as in the transition from a white Executive Director to a person of color in that role).

For the Board — It means having a strong Executive Committee in place that can provide support for the new director and act if the new director is not working out, and that makes sure that board turnover is held to a minimum.

For the Existing Staff — It means changing relationships with friends and building trust with a new person or a familiar person in a new role.

Studies have found that outstanding Executive Directors have the following four qualities:

- They believe in themselves and have self-confidence
- They believe in their ability to teach, train and to select
- They have an ability to communicate expectations that are realistic and achievable
- They believe that employees can learn to make decisions and take initiative

Final Thoughts

It is possible to balance your artistic, passionate side with an analytical, deliberate style, but it is hard work. Go to management training sessions (even from mainstream sources). Good directors are made, not born. You must accept that you are now in a different position and have different responsibilities. One of those will be to find ways for dealing with the stress and learning how to relax. GFJ

Mike Roque has been Junior Organizer, Lead Organizer and Executive Director of HOPE Alive, a grassroots community organizing group in Pueblo, Colorado, as well as Executive Director of the Chinook Fund. He is currently Executive Director of the Grassroots Institute for Fundraising Training (GIFT).

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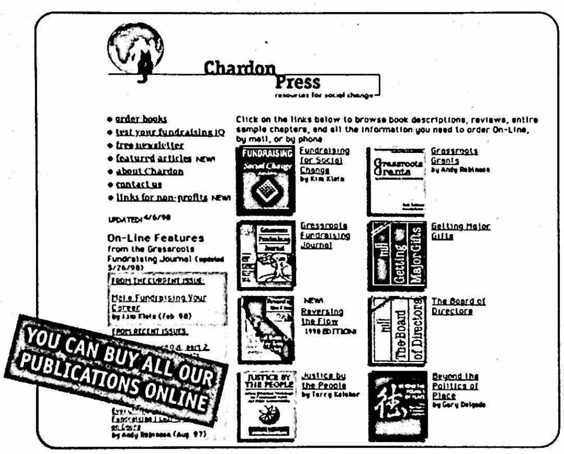

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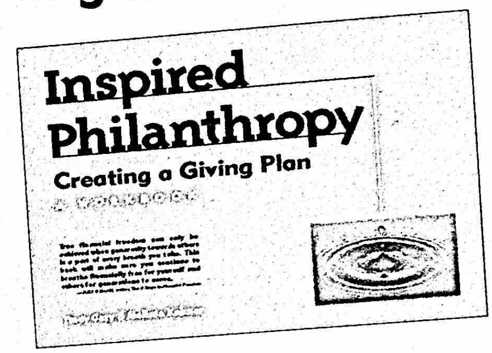

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Putting on A House Party

By Kim Klein

One of the easiest special events, and sometimes one of the most lucrative, is the common house party. In some ways, it seems silly to describe how to do a house party since anyone who has ever organized a birthday party, school picnic or anniversary celebration already knows most of what there is to know about putting on a house party. However, sometimes the events that seem easiest are fraught with pitfalls. I have recently attended three house parties in a row that were dismal failures financially. For these reasons, this seems like a good time to remind readers of the obvious and not-so-obvious details about producing a successful house party.

What It Is

First the basic description of a house party: A person invites their friends and acquaintances to a party at their house to educate them about the work of a nonprofit group and ask them to make a contribution. (More than one person can host a single house party, increasing the guest list and the people available to do the work.)

The party is also a place for the guests to see old friends, meet new people, and eat good food, which provides a cordial atmosphere in which to make the request for funds. Finally, a house party allows someone not familiar with the group to learn about it, ask questions, and get some personal attention without being obligated to give. People can either give a very small gift or not give at all without embarrassing themselves, and they can attend the house party without paying to get in.

The Uses of House Parties

A house party is a good way to raise consciousness about the issues your organization is addressing. House parties are best used to explain a complicated issue to many people at once, answer questions about it and provide the specific information people want. In the early days of the United Farm Workers movement, for example, house parties were used to explain the concept of the farmworkers union and the plight of migrant farmworkers to mainly white, non-agricultural people who were likely to be sympathetic but had little concrete information.

A second use of a house party is to allow a group of people to meet someone important, such as a candidate for office, a well-known activist, a member of the African National Congress, etc. This person gives a testimonial or asserts a particular viewpoint, and the host describes what people can do to respond (such as vote, give money, boycott, give money, demonstrate, give money).

No matter what else you ask people to do at a house party, you should ask them to give money. It is the only thing they can do right on the spot, and it is usually the most passive action, requiring the least amount of work on their part. The main purpose of a house party, then, is to expand an organization's donor base.

There are six steps to putting on a house party:

1. Find the person who is willing to host it at his or her house and to take on other responsibilities related to the event
2. Prepare the guest list
3. Design and send the invitation
4. Make follow-up calls
5. Choreograph the event, particularly the pitch
6. Follow up and evaluate

The Host

The host of a house party has several responsibilities, the least of which is providing the house and food. First, the host creates the guest list, inviting anyone he or she thinks might be interested in the organization or the topic being discussed. At the party, the host or another person gives an appropriate description of the organization and the issues. Then, the host makes a pitch for money. It is important that the host has already contributed money, as well as the party, because the host must ask people to join him or her in making a gift to the organization.

The ideal host is someone close enough to the organization to understand the importance of the group and be willing to conquer their fear of asking friends for money, but not so close as to have all their friends already be donors. A common flaw of house parties is that they draw on a small group of supporters: the same people end up attending several house parties for one organization and the organization does not succeed in expanding its donor base.

Prepare the Guest List

Once someone has volunteered to host a party, the organization's staff should help that person decide who should be invited. A house party can have any number of people, but works best when there are at least 12 guests and not more than 50. Figure out how many people the house can comfortably accommodate. If you are planning a presentation, you will need to make sure most of the people can sit down at that time. If you are only planning a brief pitch, then having enough seats will not be so important.

Generally you need to invite three times as many people as you want to attend. In addition, there should be one person from the organization (such as a board member, volunteer, or staff person) for every five to eight guests, so they can mingle with the guests, talking about the organization and answering questions in a personal way. These people should be included in the total numbers.

Obviously, start with the host's friends and relatives. Don't forget neighbors. Think about people from church, synagogue, social clubs, and work. Except for those people specifically invited to mingle and represent the organization, don't invite many people who are already donors. If you want to use the house party as an opportunity to upgrade some donors, only invite those who could be asked to give more money than they currently do.

Design and Send the Invitation

The invitation does not have to be fancy, and it can be printed at an instant-print copy shop, so expense shouldn't be an issue. For groups with access to desktop publishing programs, good-looking invitations can be turned out quite inexpensively.

It is important to design the invitation specifically for the group being invited. The invitation should reflect something about the host and about the crowd being invited. This will make people want to attend. Whether your invitation is to be serious or light, educational or assuming knowledge on the part of the invitee, always include the following:

- An indication that people will be asked for money. "Bring your checkbook" is the most direct way to make this known. You might also say, "A chance to learn about ___, and contribute to this important work." Or, "As we enter our tenth year, your financial support is more important than ever."
- A way for people to make a donation without coming to the party. On the return card include the option, "I can't come, but I want to help. Enclosed is my donation."
- A suggestion that people bring friends. Ask people to RSVP so you will know how many are coming.
- Clear directions to the house. If finding the place is at all confusing, provide a map. Include the phone number of the host under the directions.

Make Follow-Up Calls

To assure an adequate turn-out, it is important that the host follow up the written invitation with phone calls to prospective guests. Some hosts may object that calling people applies too much pressure and that their friends will resent it. The reality is that in most people's busy lives an invitation can easily get lost in the piles of paper that accumulate at home and office. Without a phone call, people often forget about the party. Rather than resenting the call, most people appreciate the reminder.

Choreograph the Event

Where most parties fail is in not having thought through exactly what will happen at the event. To avoid this danger, as the host, you should imagine you are a guest at the event and play over in your mind what will happen.

You drive up to the house. Is it obvious where to park? This can be important if you share a driveway with people not attending the party, if there is a hidden ditch near the house, or if the neighbors are the kind that are likely to call the police about a guest parked too near the crosswalk. Is the house obvious? The house number evident? Is there a porch light? Is there a sign saying "The _____ house party here"? This is especially important in rural communities where homes can be off the street, and in big apartment complexes where it may be confusing to find the right number.

You come in to the house or apartment. Is it obvious where to put your coat? If not, someone needs to be stationed at the door to take coats or show where they belong. The greeter should also point out the bathroom if it is not obvious.

You look around for people you know and make your way to the food. Is there a traffic jam at the food table? The table should be pulled out from the wall so people can serve themselves from all sides of it. The drinks should be on a separate table from the food, which encourages people to move on from the food or from the drinks. If possible, there should be several small platters of food, rather than a few large platters, so people can help themselves from any point around the table.

Are the plates big enough? People don't want to feel that they need several helpings to get full, or to stay hungry because they are too embarrassed to keep going back for more food. People returning to the food table creates a traffic jam, and people feeling hungry creates a non-money-giving atmosphere. The food should be easy to eat while standing up—finger food rather than something that needs a fork and knife. And there shouldn't be anything that would be a disaster if spilled (such as red wine on lightcolored carpeting, chili on the couch).

Once you get your food, you look for a place to sit. Are there enough chairs? Make sure no chair is sitting alone or obstructing people coming in and out of the entrance.

The Special Moment: The Pitch

Everything that happens at the house party should be built around the pitch. Arrange ahead of time that at least two and not more than four people will respond when the host says, "I hope you will make a donation." These people pull out checkbooks, or hand over checks to members of the organization. They don't have to be ostentatious about it, but a few people have to lead the way in giving money.

Some people object to this practice, claiming that it imposes too much pressure or is disingenuous. However, a little more thought will show that it is the considerate thing to do. Few people have the self-confidence to be the first to do anything. When the host asks for money, many people are prepared to give, but everyone has a brief attack of anxiety. "Perhaps this isn't when you give the money," they think, or, "Perhaps everyone else already turned in their money and I will look odd if I try to give my money now." Having some people go first gives permission for everyone else who wants to give to do it now.

Time the pitch so that the most people will be there when it is made. This is usually an hour into the party. The host calls for people's attention. The members of the organization discreetly get envelopes ready and the two to four "plants" space themselves around the room. The host introduces himself or herself and welcomes everyone. If there is a presentation, the host introduces the presenter. (If there is more than one host, such as a couple, or a group, they should take turns talking so it is clear that both or all are involved.)

After the presentation, the host must be the one to give the pitch. If the presenter is a famous person or somehow special to the work of the group, that person can sometimes make a formal request for money, followed by the host saying, "I hope you will join me in helping this important cause." It doesn't matter if the host is nervous or doesn't like asking for money. The proceeds will be much lower without a pitch from the party sponsor.

Sometimes people argue that doing the party—loaning the house, fixing the food, giving the time—should indicate the host's interest. Indeed they do. But in order for the guests to give money, the host must also say that he or she gives money and wants anyone who agrees with him or her to do the same.

How the pitch is made determines how the money will be collected. This is also decided ahead of time. The best way to get the most money at the party is to pass around envelopes immediately after the host speaks. Then the host can say, "Please put your donation in the envelope we are providing and place it in the basket over there," and point to a place. Or the host can say, "You can hand me your envelope, or give it to any of the people wearing a carnation." In any case, tell people how and when to give the money.

Avoiding Failure

I referred to three house parties I had attended that were failures. The first failed because the host had not made any follow-up calls after sending the invitations, and only five people showed up.

The other two failed because they had not been properly planned. In one, the host said, "I hope you will all think about making a gift to this group, which is my favorite." Then, without missing a beat, he said, "Now that the fundraising part is over, let's eat, drink, and have fun." People did exactly as they were told. For a few seconds they thought about giving a gift, then headed for the food. No envelopes were present, and no method of collection was obvious.

At the third party, the hosts showed a videotape about the group, then took the tape out of the TV monitor and went into the kitchen. People sat around chatting about the tape, then got up to get drinks and food. After a while, the hosts re-emerged and went on with the party. People could be heard asking: "Are we supposed to give money?" or, "What are you supposed to do with the money?" Perhaps out of fear of being rude or out of embarrassment at not knowing what to do, they did not ask the hosts.

In all cases, the parties raised almost no money and left people feeling that house parties are a waste of time. They are if not done properly.

Evaluation and Follow-up

After each party, take some time to evaluate what went well and what could have been done better. Particularly if you have used a standard presentation, reflect on its length and relevance, whether it was possible to get a discussion going, and so on.

Someone from the organization should write thank-you notes to everyone who gave money, and they should be put on the organization's mailing list. It would be a nice gesture for the host to also write thank-you notes to those who gave, if he or she wants to. If the host failed to make a pitch, then the organization should immediately send the guest list an appeal letter. If some people gave, go over the list of donors with the host. If there are people who the host thinks would have given but didn't take the opportunity or forgot, he or she should call them. If the host does not want to do that, the group should send them an appeal letter as soon as possible.

Like all fundraising strategies, house parties only work if someone actually asks for the money. Otherwise a house party is just a party—fun but no funds. GFJ

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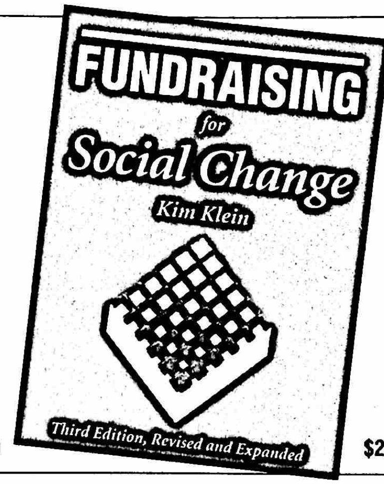

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