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Grassroots

Fundraising

Journal

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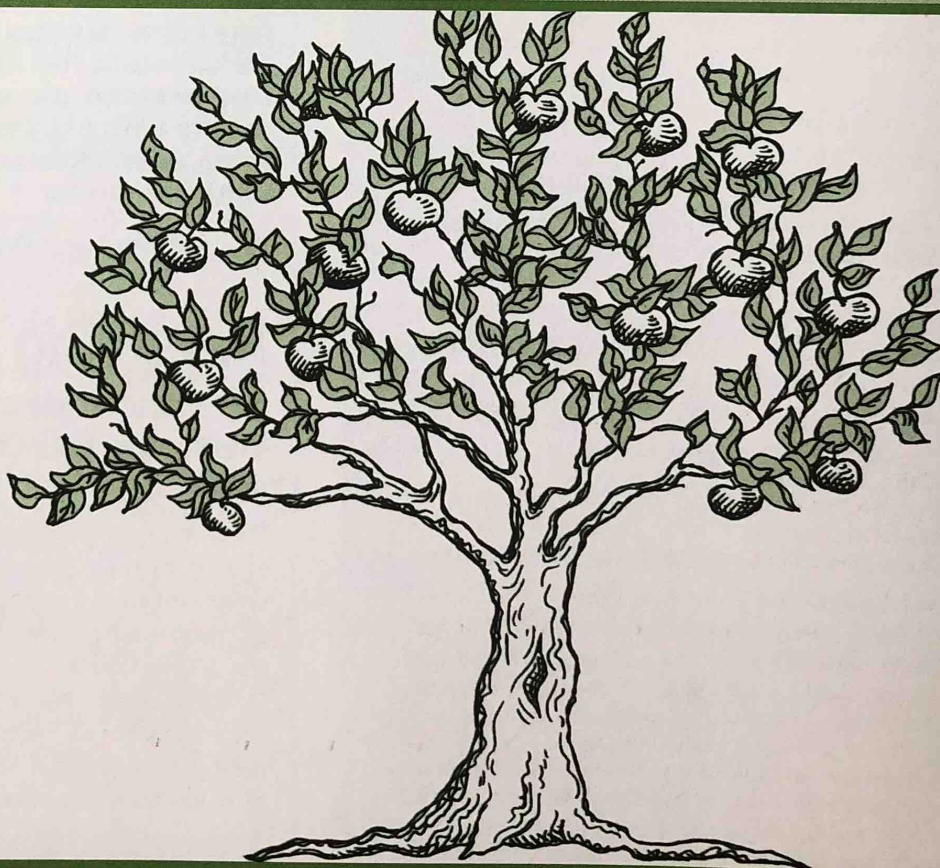
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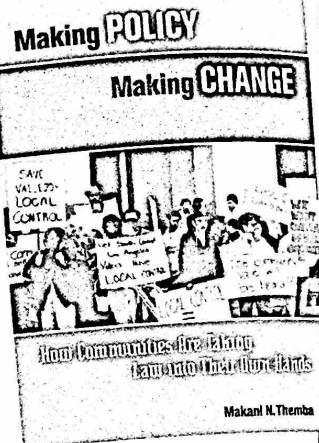
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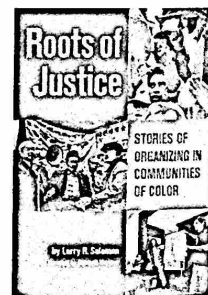
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BY LARRY SALOMON

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

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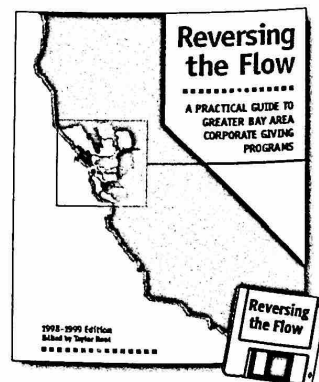
Reversing the Flow

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

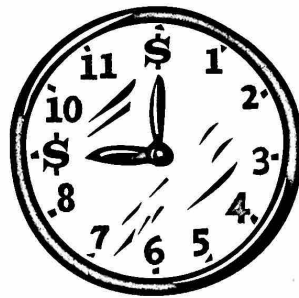
Edited by Taylor Root

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

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Asking Current Donors for Money

Why, How and How Often

by Kim Klein

In organizations' constant search for better ways to recruit new donors, they sometimes overlook the possibilities for raising additional money from current donors. In fact, grassroots groups often act as though their current donors are precious and fragile, like Grandmother's good china, and should only be brought out on special occasions. Consequently, many organizations appeal to their donors once or twice a year at the most.

However, years of fundraising experience show that many donors will respond well and generously when asked for extra gifts, and that organizations that ask their donors for money three to six times a year will have a higher renewal rate overall in addition to all that extra income.

Why Do Multiple Appeals Work?

Many groups are hesitant to send several appeals to their current donors because they have heard donors complain about being asked too often. In fact, even you may dislike being asked over and over for money from the same organization. So the fact that multiple appeals work is a little counter to our experience and bears exploring.

First, we need to remind ourselves of the purpose of fundraising, which is building relationships. Every year, an organization should have more donors, and every year its donors should be more loyal. This will occur if the donors are treated like whole people and not just ATM machines; if they are thanked in a timely fashion with a personalized note; if they are invited to the organization from time to time through an Open House or other event. If a donor calls to complain that their name has been spelled wrong or that they are getting two copies of the newsletter, their complaint is dealt with swiftly and they are treated respectfully.

As much as possible, the donors are integrated into the work of the organization by being invited to be volunteers or attending events.

Obviously, most of the donors to any organization will simply send their donation and wish the group well. The organization will never meet them. But the donor will have the impression that if they were to want to meet staff or board members, or get more involved, they would be welcomed.

As such, if a donor sends in a check and attaches a note to the check saying, "Only ask me once a year because I will only give once a year," then the organization complies with that request. The name of that donor will be coded accordingly in the database and suppressed for multiple mailings. Similarly, donors who write, "Don't phone me" should not be phoned. These are reasonable requests and a group can accommodate them.

In the absence of such a directive, however, donors should be asked for gifts several times a year. In addition to helping you raise more money, the requests help to educate the donor about the work of your group. Studies have shown that about ten percent of donors will give each time they are asked. Some donors will give every time they are asked, and some may only give one or two extra times, but each time you send a letter you will have at least a 10% response. More interesting is the fact that even donors who only give once a year are more likely to renew their gifts if they are asked several times during the year than if they are asked only once annually.

Multiple appeals are successful for any number of reasons. First, a person's cash flow can vary a great deal from month to month. In one month a person may receive an appeal from a group she supports, but has just replaced all the tires on her car and can't afford it. Two months later, she

has gotten a raise and is able to make a donation to the appeal that comes then.

Second, some people respond better to some types of appeals than to others. Sending only one or two appeals a year does not allow for much variety. Organizations that send four or five appeals will discover that donors who regularly give \$25 will give \$50, \$100 or more to a special appeal. They like the idea of buying something for the organization—media spots, an organizing drive, new computers, and the like.

We rarely know why people don't respond to appeals, but we usually make the assumption that the donor doesn't want to give when any of the following might be just as true: a) the donor has been away on vacation and mail has piled up, so he throws anything away that is not a bill or a personal letter, including your appeal; b) the donor is having personal problems and cannot think about anything else, even though she might be very committed to your group; c) the appeal is lost in the mail; d) the donor loses the appeal; he meant to give and put the appeal in a pile of papers that later got thrown away. Sometimes organizations report receiving donations for an appeal that is six months or a year old, showing that the donor has saved the appeal until he or she had some extra money, or misplaced it and decided to give when he or she saw it again.

Donors have a sense that a lot is going on with a group that sends several appeals a year. Multiple appeals keep your organization on the donor's radar screen and insure that your group will be taken into account as the donor makes his or her charitable gifts. Remember that your group is not the only one the donor gives to and may in fact be one of a dozen or more groups they support. The donor needs to know that your group continues to do good work throughout the membership year.

How Do Multiple Appeals Work?

Once we have established that multiple appeals do work, we have to look at how they work. Clearly, if so many people dislike being asked many times a year, it is possible to overdo appeals or to do them badly. So how do you do them well?

When you make a donation to a large national organization that appeals to its donors a dozen or more times a year, which is not unusual, this is what will happen. You send in your gift. You may or may not get a thank you note; if you do, it will not be personal. But, six weeks or so after your first gift, you will get a request for another gift. This request will not acknowledge your previous gift at all. In fact, it won't be clear from this appeal that the group even knows that you gave before. Whether or not you send in another gift, you will get another appeal. This is what makes people dislike multiple appeals—the sense that whatever they send is not enough.

To counter this problem, always begin an extra appeal

by thanking the person for their previous gift. This can be done even in a form letter by saying, "Dear Friend, Thank you so much for what you have given so far this year. We have used your donations to further our work. Now we have a chance to expand our work and need your help with an exciting project." The letter explains what work you are going to do and asks the donor for an extra gift: "If you can help us with an extra gift of \$35, \$50, \$100 or whatever you can afford, we will be able to..." The letter ends by thanking the donor again, "Thank you for what you have already done, and thank you in advance for helping in whatever way you can now."

How Often Should We Send Appeals?

Grassroots organizations generally find that sending four appeals a year works well. They can be sent quarterly, with a description of the exciting work coming up in the fall, winter, spring or summer. Some groups plan to send three appeals and hold one appeal as a "floater." The floater appeal will be sent whenever something really exciting is happening and may not be sent at all during a year when nothing lends itself to description in a mail appeal. Some groups send three appeal letters and one invitation to a special event, and some groups send two appeals, an invitation to a special event and call donors once a year.

What you do will depend on how widely scattered your donors are (national groups will hesitate to run up their long distance bills by calling and generally will not be inviting donors who live far away to a special event), how many volunteers you have to help you with the appeal and how many donors you have.

To find out what works best, you may want to segment your donors and try different methods on different donor segments over the course of the year. Return envelopes put in newsletters, although a good idea, do not take the place of multiple appeals.

What Should We Say in Our Appeals?

Once an organization has accepted the idea of doing multiple appeals, they often wonder what they are going to say in each different appeal. The following list of 26 ideas should help you choose some approaches that will work for your organization. Some of these ideas will be better suited to one organization than another, but almost any organization should be able to find one or two ideas that they could modify and use for their group.

Seasonal Appeals

1. Beginning of Year (written as a testimonial): "One of my New Year's resolutions is to give more money to Verygood Group. I realized that, like many of my resolutions, this one could fade if I didn't act now. So I sent an extra \$35 on Jan. 5. Will you join me and act now? Verygood will put

the money right to work, right in our community."

2. End of Summer: "This fall we know that our organizing efforts in Southend are going to result in the clean-up of the now closed Foul Factory. Getting the factory closed was one of our most important victories, but we must keep the pressure on to make sure the site is properly and thoroughly cleaned. Will you help us get a head start on our fall fundraising with an extra gift right now? Knowing that we have the money for our organizing campaign to monitor the clean-up process will make planning for it much easier."

3. End of Year: "If you are like many of us at Very Effective Group (VEG), you are gearing up for Hanukkah, Christmas or the Winter Solstice. As you think about gifts for your loved ones, please think about us. This is your last chance to make a tax-deductible gift and count it against this year's taxes. We appreciate all you have done and wish you all the best in this holiday season."

4. Spring appeal for new members: "In the spring, everything seems to put on a new look—new leaves, new flowers. Everything starts growing again. Our organization is growing too. You have been a big part of our growth and we thank you for that. This year we hope to recruit 500 new members—people like you. So, instead of asking you for a contribution, we would like you to send us the names of five people you think would be interested in joining our group."

Holiday Appeals

5. Martin Luther King's birthday: "It is no secret that Dr. King would be both pleased and appalled at the progress America has made toward ending racism. Pleased, because much that is positive has happened. Appalled, because in some ways racism has gotten worse. We at ____ Organization live and work by the principles of Dr. King and other civil rights leaders who gave their lives for their beliefs. Help us continue the legacy of Dr. King with a tribute gift to our organization in his memory."

6. Lincoln's Birthday: "President Lincoln was only one of the more famous people to be killed with a handgun. I know you want to end this senseless and continuing outrage of handgun violence. An extra donation from you, sent today, will give us the extra funds we need to work on a special program to stop the sale of handguns in our city."

7. Valentine's Day: "Do you often think of important people on Valentine's Day? Do you remember then with flowers, candy or cards? I know I do. This year, I thought of other important people in my life—the people at ____ Organization. They really depend on us, the members, for the financial support they need. Will you join me in sending an extra donation? You can send flowers or candy as well."

8. April: "Taxes. That's what's on everyone's mind right now. How much you owe. How you're going to pay it. Whether you are getting a refund. And where the tax money is going. At People Against Military Waste, we try to stop

wasteful spending on weapons no one will ever use and we question the size and scope of our military. This year, we are asking people who have supported our work in the past to consider sending us a donation equal to 10% of what you owe the government or what you will get back in a refund."

9. Memorial Day: "We invite you to remember someone important to you with a gift to Our Hospice Group. We will send a special card to the family of the person you are honoring and put the money right to work helping people cope with terminal illness."

10. Flag Day: "Flag Day. Most of us don't even own a flag anymore, but when I was a kid everyone put out a flag on June 14. At Center City Organizing Project, we were reminded by one of our senior members of the principles the flag stands for: Freedom of Speech, Liberty, Democracy, Equality, Pursuit of Happiness. With your help, we will continue to work for these ideals. We aren't putting out a flag, but we are putting out a request—will you help us with an extra gift? You cherish these ideals as much as we do, and with your help they can become reality for all people."

11. July 4: "We are inviting all our members to a special July 4 Barbecue at Phyllis Wheatley Park—the park we fought to save and worked to restore. Suggested donation: \$15 a person, \$25 for two; children under 12 are free. All you can eat, games and fun! If you can't come, be with us in spirit by sending a donation in the enclosed envelope."

12. Mother's Day/Father's Day: "On this day, we remember our own parents and celebrate parents we know. For many people, these are fun times, surrounded by loving family. But what happens when this vision of a loving family turns sour, as it does for more than half of married women who suffer from domestic abuse, or for the millions of children beaten, humiliated or sexually assaulted by relatives? Mother's Day/Father's Day becomes a cruel irony. Mark this holiday in a different way this year—with an extra donation to the Abuse Prevention Project."

13. Labor Day: "Labor Day is a wonderful day to rest from work. But what about all the people who want to work and can't find jobs? For them, Labor Day is another reminder of their joblessness. We provide training to thousands of people so that they can get good jobs in areas needing workers. Help us make sure that we are able to provide training to everyone who wants it with your extra gift this Labor Day."

14. Columbus Day: "Columbus discovered America.' This is one part of American history almost everyone knows. The problem is that this is a half-truth—Columbus discovered America for white people. There were already people here—our people. We are Native Americans. Yet our history since Columbus has been one of genocide, displacement and oppression. Our latest project at Native American Advocacy Fund is free lesson plans, games and plays for people who work with young children to teach them who

Columbus really is and who we really are. Your donations in the past helped us develop this curricula and your donation now will ensure that it is widely used."

15. Thanksgiving Day: "Your donation of \$14.50 will provide a family with turkey and all the trimmings. Give whatever you can."

16. Any holiday: As _____ holiday approaches, we are just \$1,000 short of our goal to provide _____ to all the seniors in our community. Help us celebrate this holiday with your extra gift of \$_____."

Old Stand-Bys

17. Anniversary: Our organization is now entering its _____ year of service to the community. Celebrate with us by sending \$10 (or more or less) for every year we have existed. For your gift, we will be pleased to send you our special anniversary calendar. For those donating \$1,000 or more, there will be a special reception with Famous Person at the home of Important Person."

18. Pledge: "Did you ever wish you could give more? Would you like to be a major donor, but can't afford it? Now you can. By joining our Monthly Donor Club, you can give \$10, \$20, \$50 or whatever you wish on a monthly basis. You can do this by automatic charges to your credit card, direct debit from your checking account, or we can send you convenient reminder envelopes."

19. Famous Person: "I'm _____. You may have seen me on television. In my personal life, I am very concerned about _____. From your support of _____ Organization, I know you are too. Will you join me in making an extra gift and ensuring that this important work continues?" (Famous Person can be truly famous, like Jimmy Smits or Oprah Winfrey, or it can be someone well known and well respected in your community.)

20. Another member: "My name is Joe Murphy and I have been a member of Right On Group for five years. In that time, I have witnessed the malicious efforts of our elected leaders to deny us our rights. All that stands between us and them is Right On Group. In the past five years, Right On has succeeded in _____, _____, and _____. That's why I am giving a little extra this year. My additional gift of \$15 is not a lot for me, but if all our members gave at least that much, it would really add up."

21. The Story that might have been Sad, but ended Well because of your group: "Ruthie is ten. She ran away from her violent stepfather two years ago. She was brought to our program from the streets of New York City where she was found wandering alone, penniless and dazed. Today she is a good student and has found friendships with her classmates. She needs the support of our structured program, but with continued counseling, Ruthie can achieve her dream of becoming a judge. You have helped Ruthie and 500 children like her. Help us help more. Please send your extra donation today."

22. Urgent Need: "We have an urgent need to raise \$2,000 to alert the public to the efforts of our City Council to sell Vacant Lot to developers. We have been working for four years to have that lot turned into a community center. The developers want to make it into condos that no one in our neighborhood could afford. Help us stop this gentrification. Send your extra gift today."

23. Specific Project: "Our day care center is in desperate need of new playground equipment. The quality of day care is threatened by the dilapidated swing sets and slides that are all the children have to play on. To replace the whole playground will cost \$5,000. Will you make an extra gift today toward that goal?"

Combination Appeals

24. Monthly donor to a specific project: "Please join our Food for Thought Donor Club. For \$10 a month minimum donation, you will help us keep serving 100 meals daily at our Parish Hall. In return we will be pleased to send you our special newsletter, Food For Thought."

25. Request for funds and new members in honor of an anniversary: "In honor of our second anniversary, we are forming a 2 x 4 club. Send us any combination of money, as long as it has two's in it—\$2, \$2.22, \$222, \$22.22, and send us the names of 4 people who you think will be interested in joining. To thank you, we have had a special anniversary pin designed by one of our members. It is a 2 x 4, in a shape that will surprise and delight you. Join today."

26. Any of the above appeals with a premium, "If you send your special gift before _____ date, we will send you free an autographed copy of A Great Book by A. Famous Person." **GFJ**

Kim Klein is co-publisher of the Grassroots Fundraising Journal.

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Reflections on the Purpose...

History & Future of Philanthropy

by Kim Klein

Kim Klein gave the following plenary speech to the Institute on Philanthropy, part of the Creating Change Conference sponsored by the National Gay and Lesbian Task Force, on November 11, 1999.

The most important thing I have learned from 23 years of fundraising is to think big. "Imagination is more important than knowledge," said Einstein. I think all of us who work for justice stay in this work not because of what we know, but because of what we can imagine. We know we are oppressed, but we imagine that we could not be. In fact, I think the driving philosophy of most of us who have worked for social justice for many years was succinctly expressed by Ché Guevara: "Be realistic. Do the impossible."

In this speech, I am going to be realistic. I am going to look at what our society should look like, then I will present a little about the history of philanthropy and close by telling you what I think this has to do with you and me today.

When I am asked to help a group with their fundraising, I start by asking what they intend to do and how much it is going to cost. We start with a goal: "We need to raise \$100,000 in six months in order to do our organizing campaign or continue our outreach program or staff our hotline or whatever." We start with a goal, we specify a time frame, and we look at what fundraising strategies we are going to use, who our prospects are, and who is willing to help.

Likewise, I start here by reminding us of our overall goals. We are working for a particular kind of society. We have been so beleaguered since the election of Ronald Reagan in 1980 that we sometimes lose sight of what we are, what our goals are. I will be 46 next week. According to the actuarial tables, I am slated to live to be 92. I am going to describe the kind of society I want when I am 92. I would remind everyone that the society I outline exists in various ways in countries around the world, and some parts of it even existed in our country at one time.

It is a society in which the following things are univer-

sal, which means free and of high quality to anyone who wants them: health care; elementary, secondary, and college education; child care; public transportation, parks, swimming pools, libraries, and community centers. All of these are accessible to people with disabilities. When I am 92, clean air and clean water are the norm and the idea of polluting water is unthinkable. We have long since abandoned the notion that people are superior to animals and animals to plants, and instead we value wilderness and understand ourselves to be part of a larger ecosystem. We know from our past, but not our present, that the loss of any part of the ecosystem is a loss to the whole.

We have basic income levels: First, a guaranteed annual income to all adults, which is the minimum wage. The minimum wage is enough to keep people out of poverty, so the percentage of people living in poverty is zero. This is a vast improvement from the 25% of people who live in poverty now. Second, each community has figured out an amount called the living wage, and the living wage is the minimum that employers are required to pay to employees. Finally, there is a maximum wage, which is never more than 20 times what the lowest-paid person earns. This is the most dramatic change from today, where CEOs of large corporations earn, *on average*, 491 times as much as their workers. I am indebted to United For a Fair Economy for many of these ideas.

The book of Exodus in the Torah describes this society this way: "The person who had much did not have too much and the person who had little did not have too little."

The society we work toward is characterized by a sincere affirmation that difference is good, and that one's gender, sexual orientation or race is a source of pride, but not

superiority. Children are safe and well fed. We are measured and valued by how well we love each other and how kind we are to one another, not by how much money we earn or how much money we have raised or how many votes we can influence.

Our military is small. Largely it consists of the National Guard which is brought out during hurricanes and earthquakes. There is no market for weapons, and missiles are displayed in museums—the leftover products of a more primitive age.

There are many other components to this society—it respects age, people are involved in governing themselves, the nation as a whole tries to do what is best for each person and values each person as an individual. Every individual considers what they do in terms of what is good for the whole.

I spend time outlining this society because I believe that you must know where you are going in order to make plans to get there. If you don't have goals, then all your plans, your organizing, your advocating, your litigating, your fundraising, have no real purpose.

Where Philanthropy Began

Now, I am going to step back from the society I want us to have by the time I am 92, and go back about 90 years to the period of 1900–1920. As is happening now at the turn of the 21st century, the turn of the 20th century saw vast amounts of wealth being accumulated by a few people. The number of millionaires in the United States increased from 100 in 1880 to 40,000 by 1916. I want discuss three of these wealthy people: John D. Rockefeller, Andrew Carnegie and Henry Ford.

I find these men remarkable. I hope most of us are familiar enough with history to know that they were also remarkably ruthless. Many of their actions can only be described as evil. However, they were also complicated men and the institutions they endowed have had a profound influence on all of us. I think knowing a little more about what they had in mind when they set up their foundations and charities might help us in conceptualizing the future of foundation philanthropy.

Let's start with John D. Rockefeller, Sr. In 1913, he was the wealthiest man in the world, with a personal fortune of some \$900 million. He was a close friend of the man who has probably exerted the most influence on the structure of foundations of anyone—a man named Frederick Gates. Frederick Gates was a Baptist minister, a close friend of Rockefeller since 1889 when Rockefeller had committed \$600,000 to the University of Chicago, which was founded as a Baptist College. Gates became Rockefeller's personal giving adviser.

Rockefeller wanted a more planned method for giving away money, and Gates conceptualized what was called "scientific benevolence." This marked a change for Rockefeller from giving to individuals who had needs to giving

entirely to institutions, and over time to institutions that he created. The Rockefeller Foundation, the earliest of the private foundations, was created in part because, while touring some of the mining towns he owned, Rockefeller felt the degree of poverty the miners lived in was so extreme that it could lead to revolution. To avoid a full-scale revolt would require ameliorating poverty. To do so, Gates and Rockefeller began what would become the Rockefeller Foundation. The desire to avoid revolution subconsciously informs much philanthropy today.

Rockefeller's contemporary, Andrew Carnegie, was also a self-made millionaire who held very different beliefs about wealth than did Rockefeller. ("Self made" as my friend Naomi Brussel points out, is a misleading term, since he made the money from his workers. What we mean by "self-made" is that he didn't inherit money that someone else made off of the workers.) Carnegie believed that wealthy people should give away all their money before they die, and that a hefty estate tax was the wisest tax. He said, "By taxing estates heavily at death, the state marks its condemnation of the selfish millionaire's unworthy life." He further says in his famous essay, "The Gospel of Wealth," "I would as soon leave my son a curse as the almighty dollar."

Beginning in 1881 Carnegie provided funds to establish libraries; by 1907 he had contributed more than \$40 million toward more than 1,600 of them. In 1902, he sold his steel enterprises to J.P. Morgan for \$300 million and started a series of foundations, some of which still exist today.

Henry Ford, on the other hand, abhorred both charity and philanthropy. In 1914, he attempted to deal with his large wealth by creating an innovative profit-sharing plan for Ford Motor Vehicle Employees. He believed that everyone who worked for him should earn enough to be able to afford a Ford. Late in his life, he set up the Ford Foundation but didn't specify what the money would be used for. When he was asked what he thought about the ability of private philanthropy to adequately address social problems, he said, "They may do some good. Of course they are not adequate. But my idea is justice, not charity. I have little use for charity or philanthropy as such."

As you can see, these were complex individuals, but the most important thing to remember is that they reflected their time. They represented solid business thinking of their day.

As these and other less wealthy people began establishing foundations, people started asking whether private individuals should have so much influence on the way social services were provided, in effect controlling the destiny of the poor. This controversy came to a head because of events at one of Rockefeller's companies, the Colorado Fuel and Iron Company. The United Mine Workers' efforts to unionize the workers there were met with violent confrontation, eventually resulting in the National Guard and

federal troops being called out, the death of a number of strikers, and continued denouncement of Rockefeller by the UMW. Most of us know this struggle as the Ludlow Massacre of 1914.

In response to these new social situations, Congress created a citizens commission in 1915 called the Commission on Industrial Relations. Under the leadership of Congressman Frank Walsh, the commission took on the task of hearing testimony on the topic of "Centralization of Industrial Control and Operation of Philanthropic Foundations." The name of the commission gives us an idea that Congress had questions about the relationship of the concentration of industrial power to the establishment of these new foundations. Many spoke in favor and many spoke against the creation of foundations. These hearings resulted in an eleven-volume, 11,000-page document. The majority view was that foundations were a problem, but there was little that could be done about them.

Barbara Howe, who has written widely about the early history of foundations, comments on the Walsh Commission, "Because of congressional ambivalence toward the millionaires' foundation proposal—which on the one hand fit well into popular models of rational social planning, but on the other hand were seen as symbols of continued paternalism on the part of exploitive capitalists—the creators of the American philanthropic foundation were unable to gain either explicit credibility or open praise for their new institution."

The outbreak of World War I overshadowed the public debate about the role of foundations and the problem they pose remains unaddressed to this day. Anyone who is interested can read about how foundations have shaped higher education, research, the direction of social movements, health care and so on. But it is important to note, as Robert Arno says, "Foundations and their staff represent neither retrograde reactionaries nor subversive radicals. Rather they represent a sophisticated conservatism, supporting changes that help maintain and make more efficient an international system of power and privilege. Their watchwords are efficiency, control and planning."

Where Progressive Philanthropy Fits

What is the role of progressive philanthropy in all this? Starting in the mid-1970s with the founding of the Bread and Roses Community Fund in Philadelphia, the now-defunct Youth Project in Washington, DC, and followed quickly through the late 1970s and early 1980s by the creation of the Funding Exchange and its member funds, and the Astraea Foundation, the Peace Development Fund, and so on, we found a group of people who agreed with the criticisms of traditional foundations and added many of their own. In addition, they asked a question of imagination: Can we do it differently?

These were people deeply troubled by our nation's involvement in Viet Nam and not about to recommend that the government be in charge of anything. The slogan of the Funding Exchange could really describe the whole movement—change, not charity. These were people who believed that foundations could address the root causes of social problems. They sought to democratize private philanthropy. Their gains are extraordinary.

Community control of grantmaking—the extremely radical and previously unthinkable idea that grantees and activists would control how money was distributed, has become completely acceptable. Site visits are now common. Published annual reports, grant guidelines, access to foundation staff and even to foundation donors are taken for granted. Some of us have forgotten to tell others of us who are too young to know, that these things are profound, extraordinary, cultural shifts in foundation philanthropy. The mid-1980s and the 1990s saw another major development in organized philanthropy, the creation of identity funds—women's foundations and queer foundations. Many of these share a progressive world view with their leftist counterparts; others do not.

Progressive and queer philanthropy have proved that foundations can be vehicles for serious, lasting social change. Can they stay that way? I believe they can only through relentless and constant self-examination. By the constant application of imagination, asking, "What is the cutting edge of philanthropy now? What is the next innovation that will make philanthropy a vehicle for lasting social change?"

Creating the Future

I went through this lengthy history of foundations because most of us don't know it, and because it is important to remind ourselves that foundations have always caused people uneasiness, and if they cease to make us uneasy—whether we are donors to them, as I am, recipients of grants from them, as I am, creators of them, staff for them as I have been—the minute we feel good and peaceful about our progressive foundations is the minute we lose that very edge that made us important in the first place. I encourage all of you to learn more about the history of giving and receiving, from the Bible, from the creation of our country, and from the excellent books written about it. Rooted in history, we may be able to create a new history and a new society.

When you look deeply into philanthropy, you see another hidden history in a story in the Christian testament. Jesus is standing in a synagogue and watching the people go in and out. Jesus watched rich people put large sums into the treasury. And then a poor widow came and put in two copper coins, the equivalent of a penny. Jesus commented on this, saying, "This widow put in more than all those who contributed because they contributed out of

their abundance, but she, out of her poverty, put in everything she had."

The backdrop to all philanthropy is the philanthropy of the middle class, working class and poor. Here in the United States, 82% of all the money given away comes from families with incomes of \$60,000 and less. Seventy-one percent of taxpayers file a short form, meaning, among other things, that they receive no tax benefit for their giving. Yet seven out of ten adults give away money—in fact, more people give money than vote.

Who are these people? Some of them have public faces: Bill Gates, Ted Turner, the Packard Foundation. But the majority of them, contributing the majority of the money, are people who give because it is the right thing to do. They do not have disposable income. They give because they are asked. If their financial situation worsens and they must decrease their giving, as soon as their situation improves, they increase their giving.

It is for the sake of these people, the majority of givers, that I return to the society I wish to see in 40-some years. The world we desire to create cannot be brought about by private philanthropy alone. We, who believe in the possibility of progressive social change, must form an uneasy alliance with the government. For our own personal voluntary giving to have real impact, we must insist that our mandatory giving—our taxes—be used properly, be collected fairly, and that the tax system itself be constructed progressively.

Warren Buffett, head of Berkshire Hathaway Company and certainly one of the most successful men of our time, says that he finds it absurd that capital gains taxes are lower than income tax. When he sells a share of stock, he says, he pays a smaller percent in tax on his profit from that sale

than a social worker helping someone stay off drugs pays on his income from his job. Capital gains tax, estate tax and income tax are methods of redistribution of wealth. They are part of the solution to poverty. It is therefore ironic that few activists work for tax revision. Taxes offer an extraordinary organizing opportunity which we have largely ignored.

I want to suggest the following as necessary for moving from where we are to where we need to be:

1. Look at the word philanthropist. Either reclaim it, so that everyone who gives away money thinks of themselves as a philanthropist, or abandon it and stop using it at all to describe anything progressive or queer.

2. Focus on the subtext of my whole talk: All social justice requires an understanding of money—how it works, who has it, how it is taxed, how it is given away. Therefore, fundraising is central to program work, not ancillary, not supportive of, central to. Get rid of the barriers between program and fundraising.

3. Whatever your work is—hospice, litigation, teaching, writing, giving money, raising money—be clear about the context. Why are you doing this work? What do you hope to accomplish? We must walk a fine line between Reinhold Neibuhr's belief, "Nothing worth doing can be accomplished in our lifetime, therefore we must be saved by hope," and Rabbi Hillel's questions, "If not me, who? If not now, when?" **GFJ**

SOURCES:

- Robert Arno, ed. *Philanthropy and Cultural Imperialism*. Indiana University Press, 1982.
- Teresa Odendahl. *Charity Begins at Home: Generosity and Self-Interest among the Philanthropic Elite*. New York: Basic Books, 1990.

Kim Klein is co-publisher of the Grassroots Fundraising Journal.

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In-Kind Gifts:

Legal, Financial & Matching Considerations

by Paul Rosa

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Acknowledging In-Kind Gifts

Many nonprofit organizations receive goods or services as contributions, in addition to cash. These non-cash contributions are referred to as in-kind gifts.

As with cash contributions, your organization should acknowledge all in-kind gifts. However, you are required by law (for tax-deduction purposes) to acknowledge in-kind gifts of goods received in excess of \$250. (The law does not require you to acknowledge donated services, as the donor cannot take a tax deduction for services.) Putting a value on contributed equipment, goods or services is always the responsibility of the donor, and if the value of the donation is important (for matching or other purposes), it is best to ask the donor to indicate that value, in writing, when it is made.

In your written acknowledgment to the donor, you should fully describe the in-kind donation. You should also note whether you provided any consideration, in whole or in part, for the in-kind goods received. For example, if an outfitter agrees to donate most of the proceeds from a river trip to your organization, but asks that you pay the salaries of the two guides, you acknowledge the donation of a two-day trip for 10 people on the New River, but also stipulate that you paid a sum of \$80 to the outfitter to reimburse the two guides.

Recording In-Kind Gifts

It is very important to document carefully all in-kind gifts so that you can properly acknowledge the gifts individ-

ually and in your annual report, go back to your in-kind donors for additional gifts, and use these in-kind donations, where appropriate, to match foundation and government grants.

But what about including the in-kind gifts as income in your financial accounting? For in-kind donations of goods and equipment, the rules established by the Financial Accounting Standards Board recommend that each organization establish for itself a policy governing at what level such gifts should be recorded as income. For in-kind services, the new rules require that an organization record in-kind services as income if:

- The in-kind services create or enhance nonfinancial assets (for example, a group of volunteers construct a new building to house the organization), or
- The in-kind services require specialized skills, are provided by individuals possessing those skills, and would normally have to be purchased. (for example, donated accounting or legal services)

Other in-kind services that do not meet the above criteria, such as volunteer hours spent answering the phone, getting out mailings, etc., should not be recorded as income, although it is recommended that they be documented in the financial statements with a footnote.

For small nonprofits, the question of whether to record or not to record in-kind gifts hinges on whether their omission from the financial statements will cause readers to miss significant work that an organization has accomplished. If

you have questions on the fine points of recording your in-kind gifts in your financial statements, it is best to consult a Certified Public Accountant.

Using In-Kind Donations as Matches

Even if your organization does not record in-kind gifts as income as described above, careful documentation can allow you to use donated goods and services as a match for grant purposes. In using in-kind donations to match government and foundation grants, here are a few tips:

- If you are hoping to use in-kind goods or services to match a government or foundation grant, always check first with the agency or foundation to see what kind of in-kind match they will allow, as the rules governing such matches vary tremendously from one agency or foundation to another.
- Services or tangible goods used as a match must usually be contributed during the period of the grant. For example,

donated water quality analysis services performed in November, 1997, could probably not be used to match a grant for a water quality assessment project slated to begin on January 1, 1998.

- Donated goods and services used in a match must directly support and further the goals of the grant. For example, an in-kind gift of filing cabinets could not be used to match a grant for restoring the natural vegetation along XYZ Creek, although a donated truckload of indigenous plants probably could.
- If donated services are used to match a grant, the value put on these services must be reasonable for the work carried out. (A good criterion here is: would the organization have paid this rate for the services if they were not available as a donation?) **GFJ**

Many thanks to Victoria Jeans-Gail at River Network, and Kristen Conte at the National Environmental Education and Training Foundation, for their assistance with this article.

News and Analysis



Rich and Poor

The *Grassroots Fundraising Journal* is dedicated to helping people raise more money. It is primarily a how-to magazine, but every so often we feel it is important to remind ourselves of the larger picture.

As we go about our day-to-day work of raising money, we must not lose sight of the basic questions about how money is distributed. While we are delighted when we find a wealthy person who is also generous and cares about our cause, we must not forget the question that lingers in the background: what kind of society allows someone to amass that kind of money in the first place? Finally, we must ask ourselves how wealthy we are.

So many times, we think of wealth as being something that other people have. In fact, most of us in the United States are much wealthier than we think. Here are some star-

ling statistics from the United Nations 1998 Human Development Report that are part of the broader picture of money that is the backdrop of our work.

- Half of the world's population subsists on \$2 or less per day. More than 800 million people go hungry every day.
- The 225 richest people in the world have a combined income equal to the annual income of the poorest 47% of the world's population.
- 95% of the world's richest people are white, 99% of the world's poorest people are people of color.
- The three richest people in the world have assets that exceed the gross domestic product of the 48 least developed nations, encompassing 10 million people.
- The richest 20% of people consume 86% of the world's goods and services, the poorest 20% consume 1%.

Job Announcement

Development Director: Anti-hunger, economic justice organization seeks energetic and experienced individual for leadership in building dynamic organization. Work on fundraising, grant writing and developing long-term fundraising plan. Three years experience required. \$35-40K DOE, health.

Hunger Action Network NY State, 305 Seventh Ave. Suite 2001, NY, NY 10001.

In Memoriam

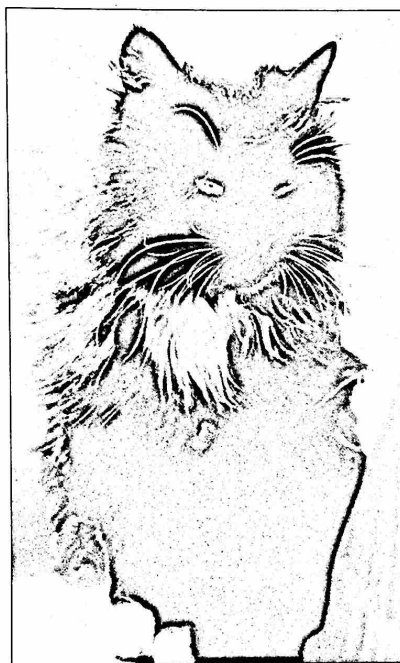
Chardonnay: 1983–1999

On a rainy Sunday in November, 1983, I went wine tasting in California's famous Napa Valley with two friends who were visiting from Wisconsin. At one winery, as the woman at the tasting bar poured each of us a small glass of Pinot Noir, she leaned over and whispered, "Do you like cats?" Why we were singled out, I don't know, but she had asked the right people.

She led us into the back, where hundreds of cases of wine were stacked, and explained that she had found a feral kitten and brought her in from the rain. "Can you take her?" she pleaded, as she delivered the tiniest kitten I have ever held into my hands.

The kitten was congested and muddy, but she had bright yellow eyes and she placed her paw on my cheek when I held her close to my face. She purred vigorously.

We named her Chardonnay, in honor of her first home,



and Nancy Adess, the editor of the *Journal*, agreed to adopt her. Chardonnay never grew very big, but she became very beautiful, with long black hair and white accents on her chin, neck ruff and all four paws. She was elegant and refined, curling her long tail like an evening gown's train around her feet when she sat, and preferring salmon and cream to mere cat food. I think she thought she had been switched at birth and her rightful home was a palace in Monaco, but she bore her existence in coastal California with dignity and grace. She was a sweet-natured and loving companion to Nancy for 16 years.

When Nancy and I decided to start a publishing venture, we named it after Chardonnay and had her image drawn into our logo. She was a dear and constant presence in the lives of all of us at Chardon Press. She died last November, but still imprints her image on everything we do.

—Kim Klein

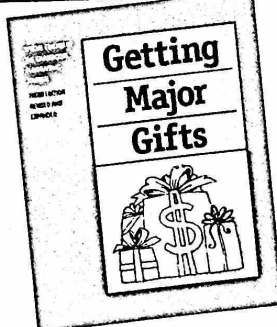
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State of the Journal

by Kim Klein

Late last summer, I was hiking with friends in Lake Tahoe National Forest in eastern California when we came across a smoldering campfire. The fire had been fairly thoroughly banked and it was clear that the campers believed they had put it out. My friends, both park rangers, began feeling the ground around the fire. Lines of hot dirt radiated out from the fire ring and it was clear to them that this campfire was burning underground, feeding on dry mulch and tiny roots. We attempted to haul water in our canteens from a nearby stream that had slowed to a trickle and to dig a trench at the outer edge of where the fire seemed to have spread, using our hands and sharp rocks, but it quickly became clear that our efforts, though valiant, were useless. Fortunately, the next hikers to come by had a cell phone, and they summoned help. Together, we kept the fire from spreading until forest rangers with a back hoe, a giant container of water and some shovels were able to get there. They put the fire out with a combination of water and digging. They told us, "If this fire had come above ground at any point, this whole area would have been wiped out."

I was reminded of stories I have read about fires burning underground for days and even years. As I sat down to write this year's "State of the Journal" I thought of that fire, and realized that, as destructive as that fire could have been, another kind of fire, a fire of goodness and justice, has been burning underground for some years.

We begin our 19th year of continuous publication with this issue. We started the *Journal* at the beginning of the Reagan administration and enter this year at the close of the Clinton years. During many, if not most, of these years, I felt that most things were getting worse politically. Witness the increasing wage gap, rising poverty, the increase in hate crimes, the explosion of new prison-building, the return of the death penalty, the loss of access to abortion, the millions of people with no health insurance—the list goes on and on.

But I start this year with more optimism than I have felt in a while. For the past three years, grassroots efforts all over the world have had some significant victories. The defeat of the Multi-Lateral Agreement on Investment (MAI) early last year, the continuing victorious lawsuits

against tobacco companies, and of course the demonstrations in Seattle during the World Trade Organization meeting last November are all heartening. I list these only because they are of international significance and most readers will be familiar with them.

There have been hundreds of local and regional victories as well, and those who wondered if the "left" was dead have realized it is not—it has been burning underground. All over the world, all over the United States, grassroots groups have been meeting in homes, community centers, libraries, churches and temples, school cafeterias and the like, discussing, analyzing and planning their work for social justice and reporting on work accomplished.

To accomplish all this work has required massive amounts of capital. In every meeting in every grassroots organization one constant agenda item is fundraising.

Trends in Fundraising

I know for a fact that the *Grassroots Fundraising Journal* has helped people shape their strategies and increase their income. We receive letters and e-mails from around the country, and even from overseas, telling us how helpful articles have been, asking for reprints, asking questions based on articles, and occasionally submitting articles that add to the written knowledge we have about grassroots fundraising.

As readers know, grassroots fundraising is both changing and staying the same. Personal solicitation remains the most effective strategy; middle class, working class and poor people remain the most consistent givers; and people continue to express as their reason for making a gift, "Someone asked me." At the same time, the Internet is adding new dimensions to fundraising: many organizations are raising money via their Web sites, e-mail newsletters are taking the place of paper ones, and members of some organizations can share ideas and questions with each other at any time using a listserv. The extraordinary growth in the stock market means that even tiny groups are receiving gifts of stock. An aging population has everyone looking at ways to implement planned giving strategies.

One trend in fundraising I'm very encouraged by is reflected in the work of a new organization called GIFT—the Grassroots Institute for Fundraising Training. Gift is working to diversify fundraising in a variety of ways: by increasing the number of people of color in fundraising, understanding and influencing the trends in giving in communities of color, and strengthening the fundraising capacity of community organizations of color.

GIFT's work is inspired partly by the observation that most fundraising professionals are white people. Twenty years ago, they were mostly white men. Twenty years ago, many of us looked at what was lacking in fundraising from the point of view of gender and started a movement to bring more women into fundraising. By looking at the barriers that kept women out and expanding our thinking to include seeing women as donors and considering whether women have different giving patterns than men, we now have a profession with at least as many women as men, and we have a rise in the number of women's foundations.

Looking at fundraising through the lens of race raises similar critical issues and we hope will have a similar effect. GIFT provides people of color who want to become development directors both training in fundraising strategies and opportunities to work as interns. It strengthens organizations in their capacity to raise money, and promotes dialogue about how to address racism in the not-for-profit

community, which is the least integrated of the three sectors: government, corporate and nonprofit.

People wanting more information about this program can contact the GIFT office at (303) 455-6361 or send e-mail to giftdenver@uswest.net.

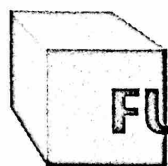
The *Journal* is committed to keeping up with changes and trends in fundraising and informing our readers with case studies, practical how-to applications, and new ideas to help your organizations grow and thrive. We are always open to suggestions about the kinds of articles you'd like to see in the *Journal*, as well as to receiving manuscripts for possible inclusion.

The *Journal* now has 2,400 paid subscribers, with a true circulation of as much as five times that number. Our goal this year is to reach the 5,000 subscriber mark. You can help spread the word to colleagues and friends, buy them gift subscriptions, or suggest they visit our Web site.

We hope that you have discovered our Web site—www.chardonpress.com—which a number of articles from the *Journal*, as well as chapters from our fundraising books. Our electronic newsletter, which you can subscribe to by going to the Web site, comes out every other month—in alternate months to the *Journal*.

The fires of justice are beginning to burn above ground. People are heartened by a reemerging movement for social change and by the energy of a new century. This should result in more giving and more creative fundraising. We at Chardon Press and the *Journal* wish you great prosperity in your fundraising work. **GFI**

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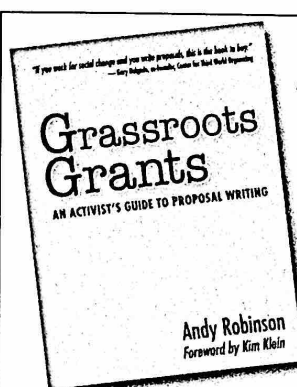
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Grassroots Fundraising Journal Index

Every February, the *Journal* publishes an updated Index of all back issues currently available. This year's Index lists articles published in the *Journal* from Vol. 8, No. 6 (Dec., 1989) through Vol. 17 (1998), with the exception of the following out-of-print issues: Vol. 9, Nos. 1, 3; Vol. 13, Nos. 2, 3, 4; Vol. 14, Nos. 1, 2 and 4, and Vol. 18, No. 3.

Articles here are listed chronologically within topic headings. Titles in italics are book reviews.

Volumes 1 through 8:5 are out of print. However, two series of popular past articles have been collected in the Reprint Collections, *Getting Major Gifts* and *The Board of Directors*.

To order articles or reprint collections, see order form, page 19. Single articles not available; order by Volume and Issue.

AD JOURNALS

See *Events*

AIDS

AIDS Funding: A Guide to Giving by Foundations and Charitable Organizations, by C. Edward Murphy, ed. Vol.10:5, 1991.

AIDS Fundraising in the 90s, by Michael Seltzer, ed. Vol.10:5, 1991.

ALTERNATIVE FUNDS

See also *Federated Funds*

"Alternative Fund Movement Challenges United Way Domination of Charity Drives," by NCRP. Vol. 8:6, 1989.

"Hope Despite the Times," by June Makela. Vol. 9:2, 1990.

ANIMAL WELFARE

See *Environment*

APPEALS

See *Direct Mail; Mailing Lists*

ARTS

United Arts Fundraising in the 1990s, by James L. Shanahan. Vol.12:6, 1993.

Successful Fundraising for the Arts and Cultural Organizations, Second Edition, by Karen Brooks Hopkins and Carolyn Stolper Friedman. Vol. 16:5, 1997.

BENEFITS

See *Events*

BOARDS OF DIRECTORS

"When Board Members Wriggle Out of Fundraising," by Kim Klein. Vol. 8:6, 1989.

"Beyond Board Bashing," by G. Worth George. Vol. 9:4, 1990.

"When Loyalty is Not Primary," by Kim Klein. Vol. 9:6, 1990.

Policy vs. Paper Clips: Selling the Corporate Model to Your Nonprofit Board, by Eugene Fram with Vicky Brown. Vol.10:4, 1991.

"10 Action Steps for Nonprofit Board Members in Responding to the Challenges of the 1990s," by Dick Vittitow. Vol.10:6, 1991.

"28 More (and Easier) Ways for Board Members to Raise \$500," by Kim Klein. Vol.11:5, 1992.

"Do You Have an Effective Board of Directors?" by Stephanie Roth. Vol.12:3, 1993.

The Responsibilities of a Charity's Volunteer Board, by Better Business Bureau of Philadelphia. Vol.13:1, 1994.

"Don't Just Stand There, Say Something," by Kim Klein. Vol.14:3, 1995.

Boards from Hell, by Susan M. Scribner. Vol.14:5, 1995.

"A Few (More) Words on Better Board Meetings," by Kim Klein. Vol.15:5, 1996.

"Reflections of a Board Member," by Stephanie Roth. Vol. 16:5, 1997.

"Contracts with Board Members: A Working Model," by Octavia Morgan. Vol. 17:1, 1998.

"How Does Your Board Measure Up?" by Stephanie Roth. Vol. 17:4, 1998.

Guidebook for Directors of Nonprofit Corporations, George W. Overton, ed. Vol. 18:1, 1999.

BUDGETING

See also *Hard Times, Planning*

"How to Make Budget Cuts," by Kim Klein. Vol.10:5, 1991.

"Budgeting for Fundraising," by Kim Klein. Vol.11:6, 1992.

"Stopping Income Leaks," by Beth Raps. Vol. 17:2, 1998.

CAPITAL CAMPAIGNS

You Can Run a Capital Campaign, by John William Zehring. Vol.10:4, 1991.

Directory of Building and Equipment Grants (Third Edition), from Research Grant Guides. Vol.13:6, 1994.

"How We Raised Money in a Hurry," by Mary Humphries. Vol. 18:6, 1999.

COMPUTERS, SOFTWARE

See *Equipment and Supplies*

CORPORATE GIVING

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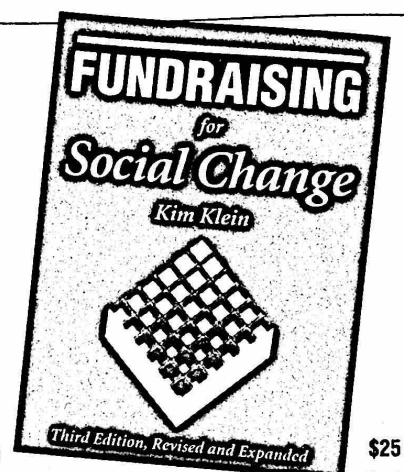
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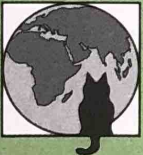
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