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# **Grassroots Fundraising Journal**

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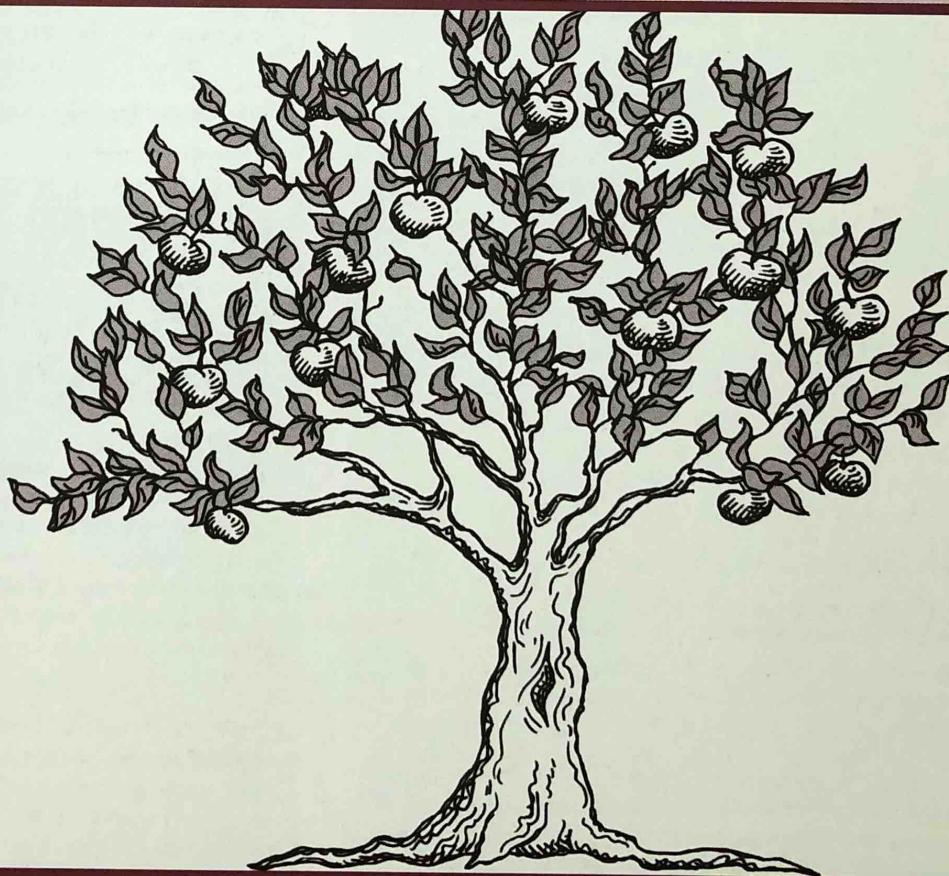
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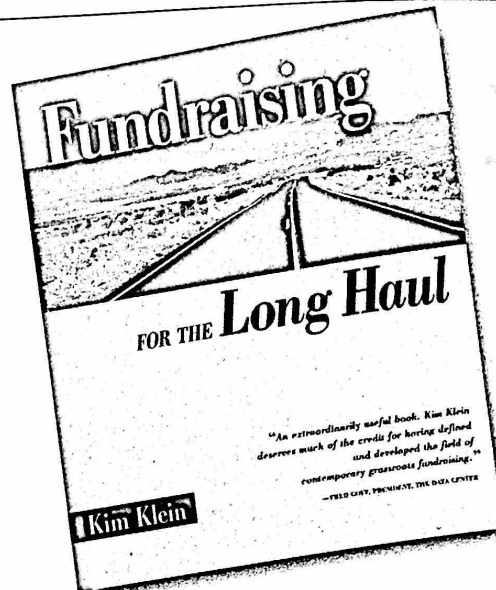
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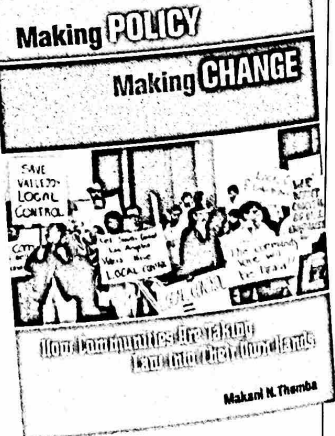
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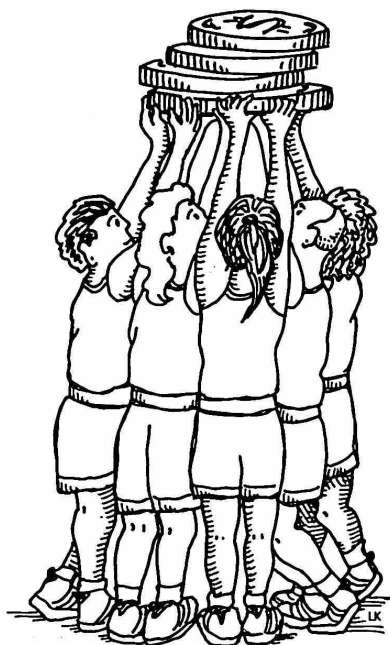
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## Membership Pays

# The Role of Members in Grassroots Fundraising

by Sara Mersha

**G**rassroots organizations know the importance of having and developing membership to build leadership and power. We also know, at least theoretically, the importance of doing grassroots fundraising so that we can be directed not by foundation trends, but by our goals to fundamentally transform social systems of oppression and exploitation. The experience of DARE — Direct Action for Rights and Equality — shows the benefits of linking these two activities by involving members in grassroots fundraising.

DARE is a multiracial, multilingual grassroots community organization in Providence, Rhode Island whose mission is to organize low-income families in communities of color for social, economic, and political justice.

Membership involvement in fundraising not only brings in more money for our crucial work, it also builds the organization by deepening members' commitment, developing leadership skills beyond a core group, building connections and teamwork among members, and expanding members' ability to drive the organization's work.

### **Deepening Commitment: Membership Dues**

Since DARE was founded in 1986 — by five people around a kitchen table, as the story goes — dues have been a key component in defining membership. Dues contribute a small percentage of the organization's budget; in recent years, DARE has raised \$2,500 to \$3,000 in membership dues. In an overall organizational budget of about \$300,000, this may seem like a drop in the bucket. Why then, with a membership of low-income families in communities of color would DARE consider a person's decision to contribute money a determining factor? Simply put, requiring dues money to the organization raises the stakes, forcing

people to take their commitment to the organization more seriously. The noticeable trend is that those who pay dues are more likely to show up and take more of a role in building both campaigns and committees. Furthermore, members are willing to make this commitment because of the benefits of being a part of the organization.

Mary Kay Harris has been a DARE member since her son was assaulted by the police more than three years ago. She joined because she saw that DARE was working in a larger way on police relations and could help her address her son's case. After being a member for a year or two, she became Co-Chair of the Committee for Police Accountability. Today she is on staff as the Membership Coordinator. "When I was asked to join and pay membership dues," recalls Mary Kay, "I had to think about it. Once I made that commitment, I was happy to pay the dues, because it gave me a sense of belonging to something, a sense of ownership. By paying the dues, I knew my voice was just as important as the voice of anyone else in the organization. Honestly, if dues weren't a requirement and I hadn't paid, I wouldn't be here now. I follow my money — wherever it goes, I go."

Melvin Carter joined DARE almost two years ago, when he heard that DARE had won a policy to turn over city-owned vacant lots to neighbors for \$1. "I saw direct benefits to paying dues to DARE," reports Mel. "Before I walked through that door, I was by myself, no one was helping me and I had no power. DARE helped me fight to get one of those lots for my community to use." Mel is now active in two DARE initiatives: Project GREEN and Behind the Walls, a new campaign against the criminal injustice system. When asked why he is still a dues-paying member, he responds, "I have a son in prison. In 1995, I came close to being in prison myself. I know that at any moment, someone could look at

me and accuse me of a crime and because of my skin color, that might be enough to put me away. But since I'm a part of DARE, I feel that I'm not alone. I always believe that if people unite together, we have a voice and power."

Two years ago, DARE's membership voted to increase dues from \$24 to \$30 a year — the first dues increase in 12 years. A year later, what used to be DARE's Home Daycare Justice Committee became its own organization, the Daycare Justice Co-op. In an example of what they took with them from DARE membership, the Co-op's membership of more than 75 family childcare providers voted to set their dues at \$100 per year. Nurys Medina, the current Co-op Chairperson, recalls, "We were all at a meeting and everyone there agreed to pay the \$100, because we wanted to have enough money to do what we need in the Co-op." The providers are low income — after expenses, they make just over \$3.00 an hour from the state. However, Nurys says, "It's fair to give this much money, because it is to something that we benefit from; because of the Co-op, we've been able to fight to get health insurance and one week of vacation. It's something that we care a lot about, so we're willing to pay the dues."

Dues collection systems can be a challenge — many members pay portions at a time, and it takes work to get everyone's payments up-to-date. DARE sends reminders in the mail quarterly, asks people for dues at each membership meeting, and has a Membership Outreach Committee to do one-on-one asks with members. Though the rates of payment are not 100%, Mary Kay Harris reports, "Since I became Membership Coordinator, members chase me down to pay dues. They want to do it because they see the work DARE does, see that together we are getting the job done and taking a stand."

### ***Developing Leadership & Teamwork: The "Adbook"***

One of DARE's most successful grassroots fundraisers, both in total money raised and in levels of membership participation, is the annual Adbook. DARE members and staff ask neighborhood businesses, ally organizations, elected officials, and other DARE supporters to purchase an advertisement to go into a book. The book is then distributed throughout DARE's circles. Those who purchase ads get recognition from DARE members and supporters, and DARE brings in significant contributions.

Gladys Gould, a DARE Community Organizer, is this year's staff coordinator of the Adbook, working closely with the members on the Adbook committee to make sure that all the work gets done. She explains that a crucial component in making the Adbook a successful fundraiser is setting goals, both individually and as a group: "Last year, I was a member [of the Adbook committee], and we each had our

own goals for how much money we would sell in ads. It was hard to reach my goal, but I remember that we got most excited about reaching our overall goal for the organization together, and we did!" The process of having a group goal — and a group reward of a trip to Six Flags Amusement Park when the goal was reached — brought people together in an exciting way. Last year, DARE members and staff brought in more than \$26,000 from ad sales, and this year's Adbook committee set the goal even higher, at \$30,000.

Shannah Kurland, Executive Director of DARE, reflects that part of the success of involving members in Adbook sales comes from the fact that "everybody has some kind of contact they can ask, because everybody has connections with some kind of institution in the community, whether it's the gas company, the local grocery store, an elected official from their neighborhood, a union or other organization of which they are a part."

Another important factor in the Adbook's success is the tradition of it. People know how to do it because they have been doing it for years, and they teach new generations of DARE members through example and a structured buddy system. Thus, the Adbook project provides an excellent opportunity to bring members together who do not know each other well. Black and Latino members are often enthusiastic about being paired up together, so that they can have the advantage of working with someone who speaks another language and therefore have access to more prospects.

Furthermore, the buddy system is a great structure for leadership development. Two years ago, Maxine Anderson was new to ad-selling and insisted that she could not sell ads. Shakira Abdullah, a long-time DARE leader, was her buddy. Shakira helped Maxine identify prospects and went out with her when she went to sell ads, giving her feedback on what she did well and what she could do better. The next year, Maxine was DARE's top member ad-seller, raising more than \$1,000 in ads!

### ***Driving the Work: Connections between Member Fundraising and Organizing***

Fundraising alone can do a lot for an organization, but it is even more meaningful when it reflects and connects to the organization's actual work. This connection can be inherent in the type of fundraising activity or it may come out of individual members' high levels of commitment.

DARE special events have never brought in large amounts of money, but because they reflect and build on the community and culture of the organization, members wish to invest time in them. One special event that developed out of the organization's strategic planning process was a Millennium Vision Party. This party brought together members, allies, and other DARE supporters in a celebra-

tion where they reconnected with the organization and its purposes. Though not as successful a fundraising event as we had hoped, it nevertheless brought out a lot of volunteers and boosted organizational spirit. Pattie Horton, DARE's Administrative Coordinator, organized the event. "The Vision Party brought in more volunteers than I've ever seen work on an event! People wanted to be a part of it, to be a part of creating this vision, and they gave their time and other in-kind donations to make this happen," she said. From fixing up the building and donating and preparing food to sharing their vision for the organization at the event itself, members played a key role in putting the event together.

The Multicultural Extravaganza is a fundraiser DARE has run for the past four years, bringing a variety of talent and food together in a festive atmosphere. The first two years, DARE staff coordinated the event. For the past two years, however, Rayna Lopez, a DARE member who helped with the event during its first years, has coordinated everything. She handles many of the tasks, from recruiting talent to doing outreach to boost ticket sales. Additionally, she recruits members to help her with specific tasks, such as soliciting food donations, cooking, helping with auditions and, of course, selling tickets. This year was the most successful Multicultural Extravaganza ever, with more than 500 people attending and more than \$2,000 net brought into the organization. And all this occurred through an event that now requires minimal levels of staff time! Shakira Abdullah, DARE Treasurer, explains that DARE members put so much into this event "because this is our gift to ourselves and to the community — we're celebrating ourselves, what we love and enjoy in life!"

Though fundraising events may be seen as isolated activities, DARE has found that members' involvement in fundraising is highly connected to their commitment to the work of the organization. Juan Gallardo joined DARE a year ago and connected immediately to the Jobs with Dignity campaign, a project to win passage of a city ordinance mandating good jobs that are accessible to the community and pay a living wage. As a school bus driver, Juan currently receives no benefits; he is deeply connected to the campaign both through self-interest and because he believes what it proposes is right. Two weeks before the Multicultural Extravaganza event, he turned in \$140 in cash from ticket sales, and added even more money at the event, bringing his ticket sales alone near \$200. Juan has since joined the Adbook Committee, continuing his dedication to making DARE's fundraising a success.

Monique Williams is another prime example of the way that commitment to the organizing work can drive members' fundraising involvement. Monique is Chair of DARE's Police Accountability Committee and worked with other

members to run it without much staff support for two years. A recent victory reinvigorated the committee, and Monique started talking with other committee members about how to build the campaign further. They decided that having a part-time organizer would be key. Monique knew that the organization would need to raise a significant amount of money to be able to hire another staff person, but she did not let that stop her. She met with DARE's executive director to brainstorm possible funding sources, then worked closely with staff and other committee members to raise \$25,000 for the campaign through a successful grant proposal! Monique had a vision for what she wanted the committee to be able to do, and then found a way to fundraise to accomplish her goals.

DARE is now working to expand its members' involvement in fundraising by focusing on increasing their participation in developing the organization's overall fundraising plan. The first step is to build a fundraising committee of members that will work closely with the organization's finance committee. Shannah Kurland explains, "This new focus will build members' power in the organization. It is an opportunity for members to make decisions on what they want to spend money on and then figure out how to use fundraising to make this happen." **GFI**

*Sara Mersha is Lead Organizer at DARE, where she works primarily on the Jobs with Dignity campaign.*

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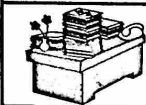


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# Workplace Fundraising

## *Supports Community-based Organizations*

by Nan Langen Steketee

*Over the last three decades, a number of organizations that raise money for community-based groups through workplace giving campaigns have taken their place alongside the oldest such organization, the United Way. This new series will introduce the world of community-based umbrella fundraising organizations (CUFOs), help you decide whether fundraising through a CUFO is right for your organization, and tell you how you can join — or create — such a fund to take advantage of the lucrative strategy of workplace fundraising.*

**A**s everyone knows, foundations and United Ways are not able to meet the resource needs of the majority of community organizations. One response to this shortfall has been the creation of community-based umbrella fundraising organizations (CUFOs), which includes groups called “alternative funds,” “federated funds” and “workplace giving federation/funds.” These organizations were formed to raise money using payroll deduction, long known to be one of the most lucrative fundraising strategies, and one which the United Way has used successfully for several decades. A CUFO’s purpose is to raise program and operating capital for its member organizations or grantee agencies.

Like all successful fundraising, CUFOs look to individuals for the bulk of their money for the simple reason that individuals give the bulk of money available in the private sector. They seek access to workplace giving campaigns because even moderate-income employees often give very generously when they can do so through deductions from their paycheck.

All CUFOs share the following important characteristics:

- The dollars are raised in workplace payroll-deduction campaigns.
- Their mission is to raise money for the organizations affiliated with it.
- The structure is a federation model, which is composed of member organizations, or a fund model, which gives grants to a fluctuating set of organizations.
- The affiliated organizations are in most cases not eligible for United Way funding, and are often engaged in work for social change.

A wide range of umbrella fundraising organizations grew out of the community organizing and advocacy movements of the 1960s, 1970s and 1980s. They support community-based groups addressing root causes of poverty;

civil rights for people of color, women, gay, lesbian, bisexual, transgendered, and disabled people; and exploitation of consumers and the environment.

More than 120 local and statewide community-based umbrella fundraising organizations exist in more than 40 states, encompassing the following types:

- Social action federations/funds. These focus their fundraising on worksite campaigns and their allocations on a variety of social change/alternative service groups that primarily work on issues concerning low-income people, women, minorities, and other disadvantaged groups.
- Black United Funds. These are African-American self-help and empowerment organizations that focus on issues affecting African Americans and that raise money primarily from the workplace.
- Funds that are controlled by and responsive to Latino and Asian/Pacific Islander constituencies.
- Women’s federations/funds. These focus their allocations on the broad range of programs serving women and girls and addressing issues of discrimination.
- Environmental federations/funds. These are composed of organizations that advocate on a wide variety of environmental issues on a state and local level.
- Federations of local health and arts organizations.

CUFOs are based on the model of empowerment, which recognizes that people in communities know what is best for their community and can create change.

Contributions from individuals in the workplace provide a major source of income for CUFOs. Many employers throughout the United States and Canada allow selected charities to make presentations and to solicit for contributions from employees every fall. The employees may give through deductions from their paychecks as well as directly

by checks, money orders or cash.

These CUFOs are a growing source of income for community organizations nationwide. The most recent figures for a full year show that, in 1996, social action federations and funds raised \$6.5 million, Black United Funds raised \$4.4 million, six women's federations raised \$800,000, and figures from 1998 show that environmental federations and funds raised \$7 million.

### *The Value of CUFOs for Members & Grantees*

There are three main reasons that organizations and individuals feel CUFOs to be valuable.

**Resources.** CUFOs bring new resources and energy. The organizations that participate through the CUFOs receive unrestricted dollars available for general operations. That kind of funding is very valuable to an organization of any size. In addition, the CUFO focuses the attention of members, individual givers and other funders on the need for revenue for the organizations affiliated with it, increasing fundraising energy and ideas along with awareness.

**Visibility.** CUFOs provide community-based organizations with visibility in the broader community, and specifically in the workplaces where contributors are sought. The CUFO itself develops press opportunities that bring attention both to the CUFO and to the organizations that participate in it. With this visibility, the CUFO is able to trade in the marketplace of ideas on what philanthropy is and how it functions, and to challenge prevailing views of social service and social change.

**Cross-issue work.** CUFOs provide an opportunity for organizations from various sectors to work together. The list of organizations that participate with a CUFO is often a list of the best and most viable activist organizations in a region. These organizations are effectively challenging the public policies and practices of business and government that oppress individuals and damage people's quality of life.

### *Democratizing Philanthropy*

In addition to the immediate values of finances, attention, and association for the organizations involved, CUFOs carry the additional value of democratizing philanthropy — that is, putting meaningful philanthropic contributions within the reach of working people. They do this in several ways.

First, when the primary vehicle for fundraising is payroll deduction, individuals are enabled to give very generously. Research has shown that contributions through paychecks are three to seven times higher than gifts from cash and checks. This makes it possible for individuals of very moderate means to make gifts of \$250 to \$1,000 easily; they become major donors despite their modest circumstances.

Second, the existence of the CUFO presents a wide

audience with a progressive social justice agenda. CUFOs offer individuals in the workplace a world view on issues of social justice, poverty, racism, women's rights and the environment that reflects working people's life experiences. Thus, CUFOs give working people of many walks of life a vehicle for donating to issues that match their values.

### *Participation of Member Organizations*

Community-based organizations that join a CUFO are often expected to become involved in the functioning of the fundraising organization, as well as to pay dues (sometimes called administrative fees). The following types of activities that member organizations may be expected to participate in occur in every CUFO:

**Selection and evaluation process.** The CUFO develops a process through which organizations that will receive contributions are selected. There are two structures: Organizations may be members of the CUFO (federation model), which means that participating organizations are selected in advance and share in the total fundraising for the year, their identities are announced to the public in materials, and they participate in the work of the CUFO by providing dues, sweat equity or both. Or, organizations are recipients of grants that the CUFO makes to them (fund model). Their identities might be listed in materials, but only as examples of the types of organizations that the CUFO supports; they must submit proposals for funding. In either structure the CUFO has a selection and evaluation/monitoring function; activists and community representatives participate in the decision-making process.

**Distribution of contributions.** The CUFO determines the formula by which it distributes the contributions it receives from individuals in the workplace. Individuals usually are permitted to designate a specific organization within the CUFO and any undesignated contributions are shared by some agreed-upon formula among the organizations.

**Campaign process.** The CUFO creates a complete campaign structure, including brochures and press materials, speakers' bureau, teams of people to promote the CUFO, team captains, fundraising training for all volunteers, bookkeeper/accountant, and special events coordinators.

**Outreach program.** The CUFO develops a process for identifying and cultivating new campaign locations. Teams of volunteers must be taught to do this work and to provide appropriate follow up on all leads. The process of identifying new campaign sites and securing a campaign can take from one visit to years of cultivation.

**Additional programs.** These can include donor services, member group/grantee technical assistance, fundraising outside of the workplace, and lectures/workshops on topics related to the issues covered by the CUFO.

### **Relationship with Other Umbrella Fundraising Organizations**

Each CUFO develops a working relationship with its sister organizations in the workplace fundraising effort. When more than one CUFO exists in a region, they often work together to open new campaigns and maximize the giving from existing ones. In Philadelphia, for example, the AIDS Fund, the Black United Fund of PA, the Bread and Roses Community Fund, the Environmental Fund for PA, and Women's Way have worked together to start new campaigns.

Most often the local United Way views the CUFO with suspicion. United Way had enjoyed a virtual monopoly on workplace giving for many years; their monopoly began to erode with the establishment of the Combined Federal Campaign (the workplace giving campaign for federal employees worldwide) in the late 1950s, the establishment of the first Black United Fund (Brotherhood Crusade of Los Angeles) in the late 1960s and with social action, women's and environmental funds in succeeding decades. Rather than viewing the CUFO as an ally in bringing additional donors into the ranks of workplace givers, United Ways tend to view CUFOs as interlopers on their turf.

### **Why Employers Like CUFOs**

The success of local workplace giving efforts depends on the creative ability of CUFOs to work together and to publicize their work. They are successful when they convince employers to open their workplace giving drives to more than one fund.

Employers are the ones to decide which charitable umbrella organizations will be welcomed into a giving campaign in their workplace. Employers open their campaigns to additional fundraising umbrella organizations for

a variety of reasons:

- to include charities that reflect the diversity of their employees
- to respond to the requests of their employees
- to improve employee morale, particularly around a fall charity drive that has stagnated or that is unpopular with management or labor
- to offer flexible giving options as an additional employment benefit, along with such things as flex hours and cafeteria benefit plans

### **How Your Organization Can Participate in a CUFO**

Check the Web sites of the groups listed in the technical assistance box (or send e-mail to groups without a Web site) for listings of CUFOs within their region. If there is a CUFO in your region, go and speak to them. Find out how to join and what your part in the organization would be. If there is no room for your organization at this time, ask how you might help them build their base to the point where taking on your organization is feasible.

The process of supporting CUFOs is one of political education, organizing and fundraising. Individuals in the movement for workplace giving are not in it solely for resources for their own organizations. We are in it to expand the resources for all social justice efforts in many issue areas. Join us! **GFJ**

*Nan Langen Steketee is Executive Director of the Center for Responsible Funding in Philadelphia and member of the Board of Directors of the National Alliance for Choice in Giving (NACG), which provides training and technical assistance to CUFOs and coordinates efforts to gain access to regional and national workplace campaigns.*

### **GLOSSARY**

**Federation model:** CUFO composed of member organizations that receive a share of the money the CUFO collects.

**Fund model:** CUFO that makes grants to organizations on an annual basis based on an annual decision process.

**Workplace campaign:** The total process of raising funds from employees at their place of employment.

**Open Workplace Campaign:** Campaign that allows more than one CUFO to solicit employees for contributions and in which the employer sends the contribution to the CUFO directly.

**Donor Option/Donor Choice/Specific Care:** Terms United Ways use to describe a type of choice in giving; less preferred than open workplace campaigns because the CUFOs have more visibility in an open workplace campaign and receive the money directly from the employer.

### **TECHNICAL ASSISTANCE PROVIDERS FOR CUFOs**

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# Rebuilding

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## *the Sitka Fine Arts Camp*

by Arlene Oehler

**S**itka, a city of 8,500 residents on the Southeast Alaska coast, is a popular stop for tourists on cruise ships. It is home to Alaska Arts Southeast, Inc. a nonprofit organization that runs the Sitka Fine Arts Camp, founded in 1974. In 1997, financial problems forced the camp to close. However, thanks to the Alaska Arts Southeast's Board of Directors working aggressively to build a diversified funding base, the camp was able to reopen in 1998 and offer sessions that year and in 1999. This article describes how that happened.

### ***The Program***

The main purpose of the camp is to provide Alaska's diverse ethnic youth in grades seven through twelve with artistic opportunities they don't receive in their home schools. In a ten-day experience, campers take classes in visual and performing arts, computer applications, and literary arts. An Alaska Native arts sequence is also included; in 1999 it featured classes in wood carving, red cedar bark weaving, and Southeast Alaska Native traditional song and dance. In 1999, there were 101 campers, up from 67 the year before. Approximately one-third of last year's campers came from Sitka, with the rest from throughout Alaska and four from out of state. We hope to enroll 150 campers at the 2000 camp.

### ***Building a Diversified Funding Base***

#### **1998**

At the end of 1997, I joined the director of the 1998 Sitka Fine Arts Camp, Dr. Lana Elliott, as her assistant to plan the 1998 season. Because the camp had been offered for more than 20 years in Sitka, it had a history of community support. But it had been closed for a year, and we had to work on developing a diversified donor base and begin advertising the camp. We defined our potential donor base as local individuals, community businesses and service groups, and corporate and private foundations. I met with the camp director and the president of the board of directors, Betty Keck, to start a mailing list. I began by retrieving previous donor records from the files. Board members provided

additional names, and we used the phone book to identify businesses and service groups that might support us.

We sent out 400 copies of a one-page general solicitation letter to individuals, service groups and businesses in January. Since Betty was a former Sitka business owner, she hand-delivered about 20 letters, bringing in six donations. In March, we followed up with all who had not responded with another letter, telephone calls, and visits to businesses. There is no question that it helps us to be seeking funds for a program that is familiar to local residents and to have board members who are willing to solicit funds. The treasurer of the board sent a fundraising letter to all the trustees of the college on whose campus the camp is held because her husband is on the college's Board of Trustees. Most of them sent donations and continue to contribute. She also provided a hand-written thank you to include with my letter of thanks for these donations.

The 1998 amount received from individuals was \$5,963 and from service groups was \$6,018 for a total of \$11,981, one-quarter of the total funds donated. We have benefited from the fact that there are strong camp program supporters who belong to service groups. For example, previous members of the camp's board of directors and parents of past campers are loyal supporters and fundraisers for the camp. Service groups include local chapters of the Elks, Soroptomists, Moose Lodge, and Rotary Club, as well as CHARR (Cabaret, Hotel and Restaurant Retailers Association), USCGS&WA, (U.S. Coast Guard Spouses' and Women's Association), and the Sitka White Elephant Shop, which donates the proceeds from selling secondhand items to nonprofit organizations and charitable causes.

The rest of the \$44,271 budget contributions were provided by grants from corporations (\$12,790), foundations (\$14,500), and government (\$5,000). We had information about the Nolan Charitable Trust located in nearby Wrangell and wrote a successful proposal to them that brought \$6,000 for the 1998 camp. We also applied for and received \$5,000 from two branches of a local bank: \$2,500 from the Sitka branch and \$2,500 from the Anchorage

branch. The Sitka Charitable Trust, which provides funds for cultural and educational activities and announces their application in the local paper, responded to a proposal with a donation of \$8,500. In response to a letter, the City/Borough of Sitka has put an annual \$5,000 donation to the camp in its budget.

### 1999

In 1999 our income from individuals declined a bit to \$4,245, while income from service groups was about the same as the previous year, at \$6,190, for a total of \$10,435 from these two sources. We learned that you can't assume that a donor will automatically continue or increase the amount of a donation, although some did.

As the following table indicates, most gifts from individuals in both 1998 and 1999 were in the \$100-and-under range, with service groups more evenly spread throughout the gift range. Most of the gifts came in through the general letter that went to all donors.

DOLLAR AMOUNT	INDIVIDUALS 1998	SERVICE GROUPS 1998	INDIVIDUALS 1999	SERVICE GROUPS 1999
Under \$100	21	3	11	1
\$100	10	3	6	3
\$150 - \$200	6	2	0	1
\$250 - \$300	2	1	1	1
\$500 - \$900	1	3	3	3
\$1,000 - \$1,500	2	2	2	2
\$2,000 - \$2,500		1		1

Although some contributors who donated to the 1998 camp did not make a donation to the 1999 camp, others increased their support. The White Elephant Shop, for instance, donated \$500 in 1998 and \$750 in 1999. CHARR donated \$2,000 in 1998 and \$2,500 in 1999. In 1999, our income of \$40,148 came from the following sources: individuals, \$4,245; service groups, \$6,190; corporations, \$4,750; foundations, \$15,500; and government, \$9,463.

We will continue to recruit individual donors because we feel that the camp is a community project that benefits from widespread community financial support. This year, we are sending a newsletter instead of a letter to names in our database whether they contributed or not.

We keep in touch with our contact person at the Nolan Charitable Trust, sending her camp newsletters, registration information, and the like, and the Trust repeated their \$6,000 gift in response to a proposal for 1999. The Sitka Charitable Trust increased their gift to \$9,500, and the bank gave \$1,000. In addition to the annual City of Sitka grant for \$5,000, for 1999 we applied for and received \$4,463 from the Alaska State Council on the Arts.

### 2000

The donor record of the White Elephant Shop and CHARR provide good examples of what we hope to achieve with other service groups for the 2000 camp. We are hoping for a good response from our spring mailing, which was a newsletter listing all the donors to date and providing information about the camp. Several nonprofit service groups in Sitka advertise for proposals and we send a proposal each time we see a request advertised. I have sent out detailed camp information to service groups that donated in 1998 but did not donate in 1999, including an offer to speak at a meeting or provide other information. One group has requested a presentation and others have called to have questions answered.

We are trying to improve on the personal touch. I mail letters to former donors using their names in the salutation as well as listing their previous donation and thanking them again for it. I also send hand written thank-you notes as quickly as possible to donors. As Kim Klein remarked in a January, 1999 fundraising workshop in Sitka, "Thank before you bank."

So far (April) for the 2000 camp, the White Elephant Shop has increased their donation to \$1,000 and the Alaska Arts Council has given \$1,660. The Sitka Charitable Trust has given us \$9,500 again. The bank has increased its former \$1,000 donation to \$2,000. I sent letters to ten potential sources I found listed in The Foundation Directory; most replied that they did not have available funds or did not fund in Alaska. However, I called the Charlotte Y. Martin Foundation in Seattle, WA and the contact person there thought there would be interest in funding an Alaskan project. I submitted a two-page proposal to them following the guidelines in the Foundation Directory and we received a \$10,000 grant.

### The Long-Range Plan

Our long-range plan is to triple annual contributions by 2004 to approximately \$150,000. We have our work cut out for us. Even though we will continue to seek financial assistance from foundations and businesses, individuals and service groups are local stakeholders that provide broad-based support for a program like ours.

It is not unusual to have campers come back for several seasons, become counselors, and then teach or continue to participate in some capacity in the camp experience. With that kind of camper loyalty, we are looking to build similar loyalty from a diversified funding base so this camp experience will be here for many years to come. **GFJ**

*Arlene Oehler is assistant to the director of the Sitka Fine Arts Camp.*



# Charitable Giving

## *Shows Big Jump in 1999*

**E**ach spring, the AAFRC Trust for Philanthropy releases its estimates of charitable giving in the United States for the previous year. The 2000 AAFRC (American Association of Fund-Raising Counsel) report shows significant increases in giving in 1999, reflecting primarily the growth in income of those who benefited from stock market gains and other appreciated assets.

For 1999, total charitable giving was \$190.16 billion—an increase of \$15.80 billion over 1998. Since 1997, giving has increased by more than \$15 billion annually. Giving has also assumed a larger share of the Gross Domestic Product, reaching 2.0% in 1998 and 2.1% in 1999. And, perhaps most interesting to *Journal* readers, giving as a percentage of personal income has also been growing since 1997. In 1995, personal giving represented 1.5% of personal income. In 1998 and 1999, it reached 1.8%.

Although this is a small percentage from our perspective, the fact that Americans are giving away more of their personal income is a welcome trend. We know that people of modest means give away far more than the 1.8% cited by the AAFRC, so the increase is likely due to affluent people parting with more of their recent gains in the stock market and elsewhere.

### ***Personal Giving Leads the Way***

As we would expect, and as AAFRC notes, contributions from individuals are responsible for the vast majority of the 1999 increase in overall giving, with personal giving rising an estimated \$11.63 billion—most of that from living individuals. Another \$1.99 billion were contributed by bequest. Personal giving increased 7.2% and reached \$143.71 billion; bequest giving increased 14.6% and reached \$15.61 billion.

Some wealthy individuals make contributions to foundations, and a percentage of these contributions eventually reach the nonprofit sector as grants. Contributions that formed new foundations or enlarged the endowments of existing foundations grow through investments, augmenting the value of the original gift and ultimately providing more money for distribution through foundation giving.

In 1999, giving by non-corporate foundations was estimated by the Foundation Center to have increased by \$2.80 billion, to \$19.81 billion. This was a 16.5% increase, resulting from both increases in investment returns and an infusion of new money in the form of personal contributions. In fact, personal giving to foundations has increased in most years of the last decade by double-digit percentages. In 1998, the last year for which data are available, personal giving to foundations increased by more than \$14 billion, or 37.8%. In addition, the Foundation Center reports that the number of active foundations in 1998 rose by 2,700, the largest increase in numbers since such record-keeping began in 1975. Since 1980, the number of foundations has almost doubled, billowing the amount available from these institutions.

The increase in giving also reflects giving by wealthier individuals of appreciated assets, mostly stocks, to such things as the endowments of colleges and universities. The phenomenon of giving to charitable gift funds rapidly accelerated over the past ten years as well. This type of giving tends to match the performance of the stock market, rising when the market is strong and lessening when it declines.

Corporations and their foundations increased their giving over 1998 by \$1.37 billion, up 14.2% to a total of \$11.02 billion. Corporate giving as a percentage of pretax profits in 1999 reached 1.3%, an increase of .3% over 1996.

### ***Where the Money Goes***

In keeping with their place as the largest recipient of charitable funds, religious organizations reaped the largest dollar increase of the recipient categories, with a total of \$81.78 billion. This is double the next-largest dollar increase of \$2.14 billion that went to education organizations. However, the growth in giving to education organizations was larger—8.5% compared to 5.5% for religion.

The small categories of international affairs and environment/wildlife posted large percentage increases—23.6% and 11.1%, respectively. Much of the charitable giving to these kinds of organizations is concentrated in the largest groups.

The category of nonprofits called public/society benefit, slowed in the aggregate after growing sharply the year before. However, small organizations in this category performed very well.

Giving to the arts, culture and humanities increased by a solid 5.12% in 1999, reaching \$11.07 billion. Increases were most evident in large and small organizations, but mid-sized groups also showed increases in total revenue.


Giving to health and human services also increased, by 6.28% and 7.95%, respectively. Both categories had also recorded increases of more than 20% the previous year, showing a recent pattern of strong performance.

For more detailed information on all these giving trends, you can purchase AAFRC's annual compendium, *Giving USA*, in book or disk form, by calling 888-5-GIVING or by downloading an order form from [www.aafr.org](http://www.aafr.org). The book version is \$65 + \$6 shipping; the disk version is \$135 + \$6 shipping, prepaid. **GF3**

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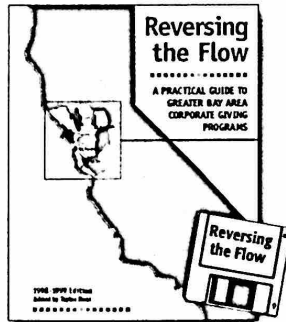
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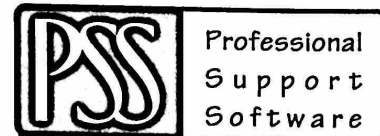
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by Alan L. Wendroff, 1999 / Wiley  
Nonprofit Series  
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Reviewed by Kim Klein

Special events are probably the most commonly used fundraising strategy. They are certainly the most malleable and most familiar. Alan Wendroff defines a special event as something that "brings together lay leaders, volunteers and a nonprofit's supporters in a social gathering that entertains and educates people regarding the work of the nonprofit in the community."

In this comprehensive and well-organized book, useful for seasoned professionals and novices alike, Wendroff focuses on helping organizations get the maximum mileage out of their events. He explains the seven goals for events:

1. Raise money
2. Update mission statement to educate your constituency
3. Motivate board members and major givers
4. Recruit volunteers and future board members
5. Expand the organization's network
6. Market the organization
7. Solicit endorsements

Reviewing these goals in detail, Wendroff shows how an organization can accomplish all of them with careful planning, using the systems he has perfected over two decades in fundraising.

This book will be most useful to organizations that want to conduct very large events – those that net at least \$50,000 and bring together several hundred or even thousands of people. Even organizations that have not put on anything like a large testimonial dinner, auction, golf tournament, and the like will be able to manage the details and logistics of these big events by using the very thorough organizing systems Wendroff presents in this book.

The book will also be very helpful to smaller organizations that have put on an annual event for several years but have not seen it grow as fast as it should. Analyzing an event using Wendroff's evaluation tools and following his recom-



mendations about doing large annual events should allow an organization to increase both income and visibility from an event they have done frequently.

Wendroff's system is built around a concept called a Master Event Time Table (METT). Though the idea of such a planning tool is not original in itself, Wendroff has expanded the METT to make the master to-do list and time table more comprehensive than any I have seen. Further, the disk that comes with the book allows readers to use this tool without having to recreate it.

Having planned dozens and attended hundreds of events myself, I found particularly helpful Wendroff's tips on seating arrangements, break-even points, how to keep track of all the details in one master chart, template letters inviting people to be on honorary committees and the special events committee, and several samples of ways to thank people.

Even if you feel (as I admit I did) that you don't really have that much more to learn about special events, you may well find you are wrong when you read this book or use the forms on the disk that comes with it. Everyone who has ever planned an event knows the truth of the saying, "The devil is in the details." With this book's focus on details, the devil is banished.

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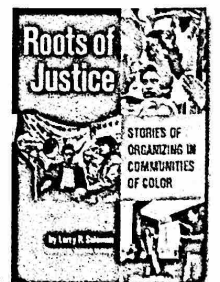
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