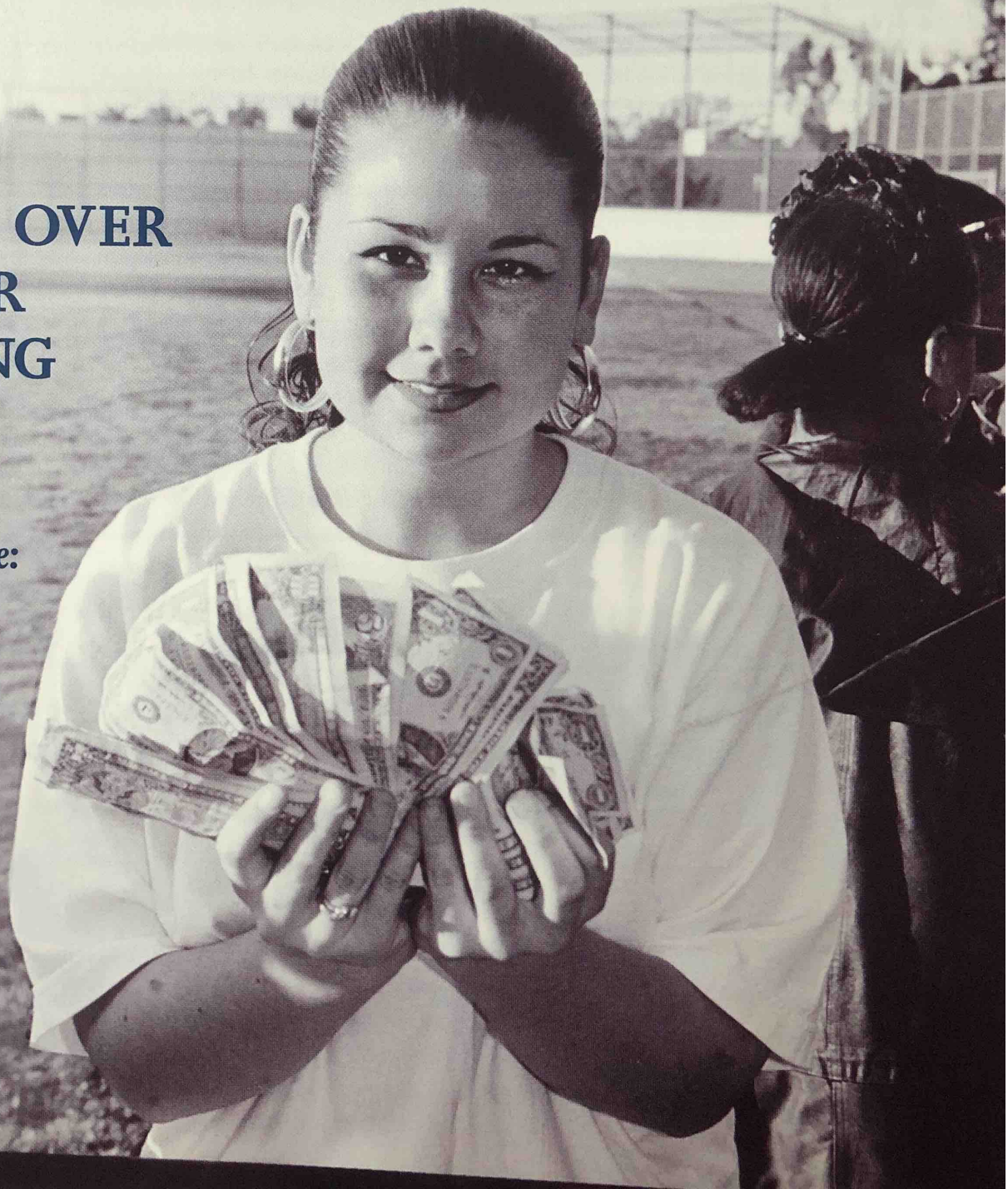
HELPING YOU RAISE MORE MONEY — OUR 20TH YEAR!

Grassroots Fundraising Journal

VOLUME 20 ▪ NUMBER 2 ▪ MARCH/APRIL 2001



Featuring:

GETTING OVER THE FEAR OF ASKING

BY KIM KLEIN

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LOOKING GOOD: DEVELOPING EFFECTIVE MATERIALS

MY ADVENTURES IN FUNDRAISING

FUNDRAISING VIDEOS

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Grassroots Fundraising Journal

The Grassroots Fundraising Journal is a publication of Chardon Press and is published six times a year: January/February, March/April, May/June, July/August, September/October, November/December

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ILLUSTRATION
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COVER PHOTO
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PRINTING
Alonzo Environmental Printing, Hayward, CA. Printed on IPA Eco-Offset 100 with soy ink

The Grassroots Fundraising Journal is a member of the Independent Press Association

SUBSCRIPTION INQUIRIES
Please call, email, mail, or log onto our Web site (addresses below).

ADVERTISING INQUIRIES
Please call or email us for media kit.

WRITERS' GUIDELINES
Please call or email us for guidelines.

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Chardon Press — Oakland, CA

 ISSN No. 0740-4832

LETTER FROM THE PUBLISHER

Introducing Our New Look

KIM KLEIN

We hope you like the new look of the *Grassroots Fundraising Journal.* For new subscribers, or those of you too busy saving the world to have noticed the many changes in the *Journal,* I'd like to call them to your attention.

New schedule. The *Journal* will continue to appear bimonthly, but the schedule has been shifted one month earlier, so the cover dates will now be January/February, March/April, May/June, July/August, September/October, and November/December.

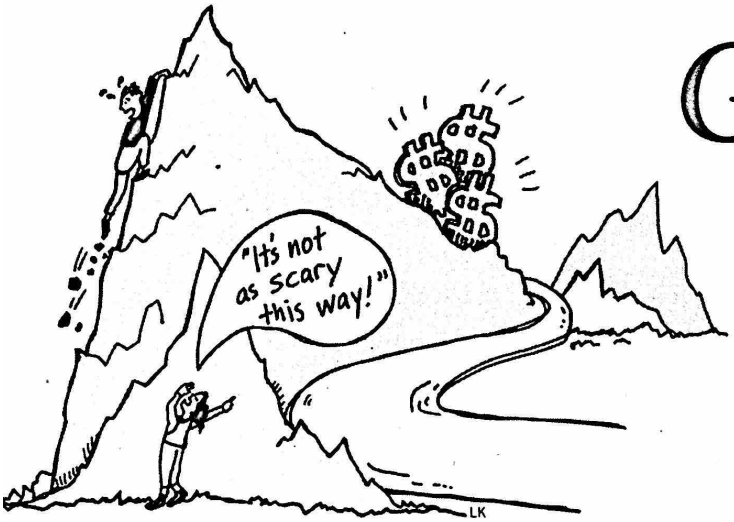
New cover. Each issue's cover will feature a photograph or illustration related to fundraising. We debut with Nancy Hernandez of Voices of Struggle, working on a campaign with Californians for Justice.

More pages. We have added four pages to the *Journal.* This allows us to keep subscription prices low by increasing income from advertising. This way, we do not compromise space for content, and readers have access to some useful products, people, and services. We thank the charter advertisers featured in this issue and encourage readers to take advantage of their products and services.

Different paper. Paper that is fully recycled and made from 100% postconsumer waste now forms the inside pages of the *Journal,* with a heavier stock for the cover (also recycled, but not 100% postconsumer), which should hold up better in the mail. The name of the paper is IPA Eco-Offset 100, made available to us thanks to our participation in a paper-buying cooperative of the Independent Press Association. IPA is an organization whose members are independent magazines and whose mission is to promote the independent voices we represent as well as help us with the nuts and bolts of publishing.

A new column. In this issue we debut a new series called "My Adventures in Fundraising," in which fundraisers tell various interesting stories about their craft. We are particularly focusing this series on people new to fundraising, or new to the strategy that they are discussing, and the lessons they learned. We have always used stories in the *Journal* to illustrate points we want to make, and this continues that tradition with first-person accounts. Shahira Tejani, who starts us off, works for California Peace Action and is a graduate of the Grassroots Institute for Fundraising Training.

With all our changes, the mission of Chardon Press remains the same: we believe that progressive social change is advanced through resources that educate and inspire people for the work. The *Grassroots Fundraising Journal* is our vehicle for documenting, analyzing, capturing, and promoting ideas and methods that allow organizations to raise the money they need without needing to change anything about who they are to get it. We believe anyone can be good at some aspect of fundraising, and we will continue to write about all the different ways there are to raise money, about people who raise money and people who give money, and about organizations that do great work with the money they raise.



Getting Over the Fear of Asking

BY KIM KLEIN

Since "Getting Over the fear of Asking" is such a commonly requested training topic, in honor of the Journal's 20th anniversary, we offer this article so that groups can train themselves in this vital skill. An earlier version of this article appears in the *Grassroots Fundraising Journal* collection, *Getting Major Gifts.* People who have taken trainings with Kim Klein or her colleagues may be familiar with the exercises described here.

Early last spring a number of people met at the headquarters of Californians for Justice on a Saturday morning. We had volunteered to walk some precincts and talk to people about two of the initiatives on the California ballot that we opposed: one would prohibit gay or lesbian marriages from ever becoming legal, and the other targeted young people of color for increased penalties in the criminal justice system. The day dawned raining and windy. At the office of Californians for Justice, we were told that, because it was so stormy, we could phone people instead of going door-to-door, although the organizer felt that visiting people personally was more effective. Several people said they didn't mind the rain, and wanted to walk. They were clearly the diehards, in my opinion. I had opted for the less effective but definitely more comfortable option of phoning.

Then the organizer said that they had found it effective to ask people for money at the door as part of the rap. She said, "Just ask for a dollar. We have found that people who give even a small amount of money are more likely to vote on election day." At that announcement, half of the group that had been willing to walk decided to phone. "I'll do anything but I can't ask for a dollar," said one volunteer. Another chimed in, "I don't mind rain, falling branches, even loose electrical lines, but I draw the line at asking for money."

I have seen this behavior over and over for many years. When it comes to asking for money, the amount doesn't matter, the cause doesn't matter, the gender, race or class of the person reacting doesn't matter.

Asking people for money continues to be the most difficult, but also the most important part of fundraising.

Every community-supported organization uses a variety of methods to raise money from individuals, such as direct mail appeals, special events, pledge programs, products for sale, and so on. But the fastest and most efficient way for an organization to raise money is for board members, staff, and volunteers to ask people directly — in person — for donations. Unfortunately, this is also the hardest way, since it requires that we directly confront our learned discomfort with asking for money.

For an organization to have an effective donor program, the people in the group must get over their fear of asking for money. The purpose of this article is to discuss some of the reasons that asking for money is difficult and to provide some exercises that will help you let them go.

SOURCES OF OUR FEARS

Asking a person for money face-to-face is an acquired taste. Few people love to do it initially; in fact most people are afraid to do it. If you are afraid to ask for money, that's normal. If you are not afraid, that's great. Stop reading this article and go ask somebody for a donation!

People are afraid to ask for money for a wide variety of reasons. However, it is important to understand that everything we think and feel about money is learned. Children have no trouble asking for anything. They ask over and over, and don't even seem to hear the word no until it has been said several times. By the time most of us have reached the age of 10, our ability to ask for what we want has been trained out of us.

In discussing some of the reasons people fear asking for money, I will focus on the United States because that is where I am from, and where most *Journal* readers live. It is also because our feelings about money are particular to our culture. There are many countries in the world where people have a very different relationship to money than we do.

Most of us are taught that four topics are taboo in polite conversation: politics, money, religion, and sex. Talking about age, illness, and death is often taboo as well, and in some parts of the country or within different cultural groups, other topics may also be off-limits. Of all these topics, the taboo against talking about money is the most firmly in place. We have ecumenical councils to break down barriers between religions, we have support, education and advocacy groups on issues of sex and sexuality, hospice programs to deal with death and dying, and a disability rights movement, but there are few serious efforts to break down our taboo about talking about money.

For example, many of us were raised to believe that it is rude to ask someone what their salary is, or how much they paid for their house or their car. In many families, one person (traditionally the man), takes care of all financial decisions and transactions. It is not unusual, even today, for spouses not to know how much each other earns, for children not to know how much their parents earn, and for close friends not to know one another's income.

The net effect of these taboos about discussing money is that money takes on the air of being both mysterious and bad. The hidden message is that "good" people don't deal with money except insofar as they must in order to live. Many people, misquoting the Bible, say, "Money is the root of all evil." In fact, Paul's statement to the Philippians in the New Testament is, "The love of money is the root of all evil." In the Letter of James, we see the much more Biblical admonition, "You have not because you ask not."

Money, in itself, has no good or evil qualities. It is not a moral substance. Money facilitates people getting what they want or need. As such, how money is used, where it is obtained, and the inequities of who has it and who does not, have moral implications. This is a very different situation from money itself being evil.

As long as money remains private and mysterious, only people who are willing to learn about it can really control it. In that case, systems can remain discriminatory and people without knowledge about how money works will have far fewer choices and much less power than those willing to break with the taboo. For example, when it is common practice not to ask about salaries, institutions can conceal the fact that women are paid less than men or that people of color receive less than white people for the same work. Banks can deny loans on the basis of race or gender with little fear of repercussions because most people have little idea of what they are entitled to.

In America, an elite upper class controls the majority of the nation's wealth, either by earning it or inheriting it, or both. It serves the interest of this ruling class for the mass of people to continue not to know about money. As political activists and participants in social change, however, we must learn about money, not only for fundraising, but for all organizing purposes — how to raise it effectively and ethically, how to manage it efficiently, and how to spend it wisely.

EXAMINING YOUR ATTITUDES

I recommend you take some time in your organization to explore feelings and anxieties about money in general and asking for money, in particular, that may be getting in the way of successfully carrying out your fundraising plans. The following are three exercises that will help you do that. To do the exercises, you will need a blackboard or easel paper and markers.

Taking the Charge Out

The first step in getting over your anxiety about asking for money is to remember that you weren't born with this anxiety, and that what you have been taught about money perpetuates a system that, in the rest of your work, you are trying to change. Take some time in your group to discuss your personal experiences with money — what each person learned as a child, and what they think now. This does not have to be a heavy, deeply personal discussion. The purpose of the following exercise is to take some of the "charge" out of the word money and help get some distance from it.

Each person in the group takes a minute or two by themselves to write down the answers to two questions:

1. What is your earliest memory of money?

2. What messages, ideas, and attitudes about money were conveyed to you by parents, peers, and others in your community?

Next, people pair up and each person takes a couple of minutes to tell their partner what they have written. After a few minutes, the group comes back together and people share key points, with someone writing them on a flipchart or blackboard.

You'll probably hear such things as:

- *Money talks*
- *Money doesn't grow on trees*
- *Money doesn't buy happiness*
- *We were taught to give it to "the needy"*
- *Don't ask for it*
- *We never had enough of it*
- *Money is power*
- *Never ask someone what their salary is*

Looking at the list, notice how many of the messages are negative or about privacy and power.

Next, the group discusses what a healthy attitude toward money might look like by considering together the following questions:

1. In an ideal world, what would people be taught as children to think about money?

2. How would this change how we feel about money as adults?

Again, record answers on a flipchart. At the end of this discussion, compare this list to the previous one. You'll probably see that what a healthy attitude might include and what people learned as children are very different.

Dispelling Fears about Asking for Money

Fears about asking for money are related to our anxiety about talking about it. For the following two easy exercises, one member of the group can act as facilitator or you can ask someone outside the group to facilitate. These exercises can be done privately, but they are more effective when group members share with each other in recognizing and letting go of fears about money.

The Worst That Can Happen

In this exercise, the group looks objectively at everyone's fears about asking for money. Confronting fear in this way is like confronting any fear. When you hear a loud, unfamiliar noise in your house at night, an immediate, normal reaction is fear. You have two choices about how to respond to this fear: 1) You can give in to the fear, huddling under the covers and imagining all the worst things the noise could mean, or 2) you can take the more sensible, but much more difficult, action of getting up and turning on all the lights until you discover that the noise was as simple as the cat knocking something over while leaping from one surface to another, your child playing a noisy computer game when she is supposed to be sleeping, or a car backfiring on the street.

In the same way, looking at everyone's fears about asking for money in the "light" of discussion with others will show that many of these fears are irrational, and that for most, the feared outcome is far less likely to happen than they think.

To begin the exercise, each person imagines asking someone for a relatively large amount of money (anything over $100). Then each person says out loud what they are most afraid might be the outcome of their solicitation. This includes not only what the prospect might say or do, but also what the prospect might think of them and what they will think of themselves. The facilitator writes down all the feared outcomes. After four or five minutes, there will probably be a list that includes the following:

- *The prospect will say no*
- *The prospect will yell at me (or hit me)*
- *The prospect will give me the money, but won't really want to, and will resent me*
- *I will feel too nauseated to continue*
- *I know the prospect doesn't have the money*
- *It is imposing on our friendship for me to ask, and we won't be friends any more*
- *The prospect will think that the only reason I was nice to her was to get money*
- *The prospect will say yes, then ask me for money for his cause*
- *I don't know if my group really deserves the money as much as some other groups might*
- *The prospect will ask me questions about the organization that I can't answer*

After this brainstorming session, the group looks at the fears they have listed. They will probably notice that they fall into three categories:

A) Fear of things that will definitely happen some of the time (the person will say no).

B) Fear of things that might happen but could be dealt with if they do (the person will ask me for money, the person will ask questions I can't answer).

C) Fear of things that are extremely unlikely to happen (I'll be punched, I'll be sued, I'll throw up).

Now, examine the fears starting from the top. For most people, the worst thing that can happen when they ask for money is that the person will say no. But, everyone who does fundraising will be told no almost as often as they will be told yes. Remember, just as it is your privilege to ask for money, it is the other person's privilege to turn you down. The person being asked may have just spent $1,000 on their car, or been asked to give to five other organizations, or have other priorities. Sometimes people will say no because they have other worries just then and can't take the time to think about your request. Perhaps they trust your friendship enough that they feel they can say no to you with no hard feelings.

While no one likes to be turned down, it is important not to take being turned down as a personal rejection, because it almost never has anything to do with you.

The fear that someone will give to your organization and then ask you for money for his or her special cause requires remembering that if someone gives to your cause, you don't personally owe them a favor. The organization the check was made out to must now write them a thank-you note and do the work you said the group would do. The obligation to the donor (to the extent that it exists) is paid by these actions.

Fundraising is about an exchange — donors provide money in exchange for work being done that the donor believes in and wants to see happen. If the person you ask then asks you for their cause, you should think about whether it is a cause you believe in. If it is and you have the money, make the gift. If not, then don't. If you believe that a person's main motive for giving money is to be able to ask for money, exclude that person from your prospect list. You want to create a base of donors who are loyal to the organization, not to you, and not to an idea that they can now raise money from you.

Questions you can't answer can be responded to with, "I don't know" or "I'll find out and let you know."

Fears such as "I know the person doesn't have the money" are very common. However, unless you have a financial statement from the person you are asking, or unless you know he or she has recently experienced a devastating financial setback, you don't know that the person doesn't have the money. Although most of us have had times when our financial situation has been bleak, the fact is that how much money we feel we can give depends mostly on what mood we are in at the time we are asked and little on objective reality. Some days a person feels generous or feels flush and some days they don't.

The group should discuss each of the fears listed. Are they real? If they are real, do they matter? What is the worst thing that can happen?

Looking at our fears makes them less scary and allows us to prepare ourselves properly for what might actually happen during a solicitation.

Sometimes it is not appropriate to ask someone for money, but this is true far less often than we think. When you consider asking someone for money and decide not to, ask yourself, "Do I have a reason not to ask, or just an excuse based on assumptions I am making about the other person?"

The Yes and No Lists

When thinking about why a person would give money to an organization, think about why you give money to any organization. Your reasons for giving and not giving will be much the same as everyone else's and will help you understand what motivates people to give.

In this exercise, participants imagine that an acquaintance — someone they like and respect, but don't know well — has come to them, explained a cause he or she is involved in, and asked for a gift. Imagine that the gift is an affordable amount, but not an amount you could give without some thought. For most people, this amount is somewhere between $50 and $250.

Each participant takes thirty seconds to write down privately on a sheet of paper all the reasons they would say yes to this request. Then, for the next thirty seconds, they list all the reasons they would say no. Asking participants to share their results, the facilitator then writes the "yes" and "no" reasons on two separate sheets of paper, or two columns on a blackboard. Generally, there are more "yes" reasons than "no" reasons. The following are the most common reasons:

Why I would say YES

- *Like the person asking*
- *Believe in the cause*
- *Get something for my money*
- *Tax deduction*
- *I feel generous*
- *Just got paid*
- *Know my money will be well used*
- *Want to support my friend*
- *Feel guilty saying no*
- *Know other people in the group*
- *Don't have time to volunteer, so give money*
- *Liked the approach*

Why I would say NO

- *Don't believe in the cause*
- *Don't have the money*
- *Bad mood that day*
- *Organization has a bad reputation*
- *Give to other things*
- *Already been asked several times that week*
- *Don't know what my money will be used for*
- *Think person asking is naive or pushy*

The group discusses the two lists. Looking at the "no" list, these answers fall into two categories:

A) Reasons that are not the asker's fault and that could not be known ahead of time.

B) Responses that appear to be "no" but are really "maybe."

In the first case, the asker usually cannot know that the prospect does not have the money right now, or that they are in a bad mood, or have been asked several times that week. When this is the reason for the rejection, the asker can only thank the prospect for their time and go on to the next prospect.

In the second case, if the prospect knew more about the organization, knew how the money was used, knew that the reasons for the organization's bad reputation have been cleared up, he or she might give. These "no" answers are really "maybe." "Maybe I would give if I thought the organization did good work." "Maybe I would give if I were in a better mood." "Maybe I would give if you had been the first group to ask me instead of the sixth."

Possibly the asker can discuss the prospect's reasons for saying no and change the answer to an affirmative. If this is not possible, the solicitor can still see that the rejection has little to do with them or their group.

A few of the "no" reasons reflect badly on the asker. For example, if the prospect thinks the asker is naive or pushy or dislikes the asker altogether, then this was an unfortunate choice of a person to solicit the gift.

The point of this exercise is twofold: to illustrate why people give and don't give and to illustrate that people have more reasons to say yes than to say no to a request for a contribution.

These exercises and the subsequent discussion they involve will help people in your group understand that asking for money is not as frightening as they may have thought. The worst thing that can happen is that the person asked will say no and usually they say no for reasons outside your control or knowledge.

Taking the time to have this discussion to help people let go of their personal barriers around asking, as well as understanding how asking for money is an important political act, will free your group to ask for the money it needs to do the work that needs to be done. GF

KIM KLEIN IS CO-PUBLISHER OF THE *GRASSROOTS FUNDRAISING JOURNAL*.

Looking Good...

Developing Effective Written Materials

BY NANCY ADESS

An organization's written materials are a major, and often the only, link between its work and its many constituencies. Better-looking and better-written materials will improve an organization's visibility, broadcast its message more widely, and ultimately generate more supporters. This article discusses how to get the visual message right. The next article will cover working with production people to keep it that way. A third article will review the basics of good writing.

THE LANGUAGE OF VISUAL IMPACT

Writing, editing and designing written materials to make them effective in a world overloaded with printed pages requires a working familiarity with writing composition and editorial production. But without the benefit of training in these areas, most nonprofit staff are subject to an often frustrating trial-and-error learning process.

Based on my own learn-by-doing experience in nonprofit work and my subsequent professional training in editing and producing educational and information materials for nonprofits, I offer here a series of tips to help take some of the error out of the trial-and-error method.

The first part of this article focuses on graphic design tips that will enhance the visual appeal of projects you design in-house. The next article in the series discusses how to work with professional graphic designers for more sophisticated pieces and with printers. A final article will cover writing tips — once you've gotten your audience's attention visually, how to keep it to the end of the piece.

WRITTEN MATERIALS SPEAK

Written materials have a direct relationship to a nonprofit organization's visibility, its ability to get more members, clients, or volunteers, and to raise more money. This is true not only for fundraising appeals and proposals, but also for the rest of your written materials. Materials that have punch and style show respect for your audience and contribute to making people want to join with you, support your work, and donate to your cause.

Think about the enormous range of written materials going out of your office. These may include newsletters, annual reports, press kits, educational pamphlets and booklets, grant proposals, membership appeals, information for volunteers, calendars, and invitations to events such as conferences, open houses, anniversary celebrations, educational forums, and fundraisers.

In fact, chances are that up to 90 percent of your interaction with your constituency and donors is through something you've written.

It's not the writing, however, that your reader first relates to, except for a headline or two — it's the visual impact of the piece. Your image as an organization is one of the primary messages of every piece you send out on those printed pages. Yet, if you're like most people, how that piece will look — what the first impression will be when the reader picks up the page — often gets short shrift in the rush to get it out. Here we look at your written materials in the reverse sequence to how you produce them, beginning with what they look like.

THE VISUAL MESSAGE

The visual impact of each piece tells the reader who you are. The message may be negative or positive. A piece that has typos in it, that's crowded on a page, printed on dark paper or poorly photocopied doesn't give a sense of respect for either the organization or the reader. While your materials don't need to look slick and high powered, they do need to look pleasant and easy to read.

Furthermore, the look of your materials should reflect something about the style of your organization. If you're a youth organization, for example, you probably don't want to project a staid, conservative image with the layout and typefaces you choose. If you're an arts organization, you may want to include a number of visual examples.

Your materials must invite the reader's attention in the first second or two, blocking out the distractions from all the other materials he or she could focus on at the moment.

Because your reader *sees* the page before he or she reads it, we look first at how you can make the most of the non-verbal language that speaks to the reader. With so many offices having computers whose programs can turn out reasonably designed pieces (either by using templates that come with the word processing programs or using a professional design program, such as PageMaker or QuarkXPress), you may be designing a lot of your written materials in-house. The following tips on various aspects of basic design will help you create clean, good-looking materials that will capture your reader's interest.

1. Color

Color wakes up the eye and draws your reader's attention. It can be used sparingly, as an accent, such as a colored line along the top of a brochure, or it can be used to set off the name of a newsletter or the headlines and subheads of a pamphlet. Keep in mind that accent color is a second color to the printer, the black ink that is usually used for text is considered the first color.

The cost of adding a second color is usually around $40, depending on the printer. So, if you are printing a large number of pieces, such as of a brochure you expect to use for a couple of years, the per-piece cost of adding a second color would be very small.

If you can't afford a second ink color, consider a light-colored paper instead, something other than the standard white, cream or beige papers. A pale yellow or light blue for a brochure or an invitation can be very appealing.

2. Illustration

Photographs, especially of people doing things, really are worth the proverbial 1,000 words. You don't need a professional photographer to get good action shots. All you need are black-and-white pictures taken from an interesting angle.

A picture of people engaged in conversation or of a volunteer helping a client will have more appeal than a posed shot of a person or a group of people. Look in your local newspaper for examples of action shots. Then keep a camera handy at the office or at organizational gatherings and capture people in action.

Don't print a photo that depends on minute details, such as reading the writing on a proclamation or a check, to make the point; these details will blur out in reproduction.

Always caption a photo. Captions are read twice as frequently as story text. Use them to tell the story the picture illustrates. You can fit a lot of information into a few sentences under a picture. So instead of captioning a picture, "Dancers enjoying themselves at recent benefit," tell the story: "We raised $10,000 at our annual dance last month. Thanks to the dedicated leadership of _____, dancing here with chair of the board, _____ , our program to _____ is assured of a healthy future."

If photography is not available, use drawings to break up the text and illustrate your points. If you have a staff person or volunteer who likes to draw, ask them to come up with some simple line art. You can also take advantage of the hundreds of clip art pictures in standard computer fonts or on the Web that can be downloaded and incorporated into computer files. Or, you can find books of clip art images in an art supply store.

3. Headlines

To make sure your headlines and subheads are readable, put them in bigger type. They become part of the visual appeal and act as signposts for the reader. In a newsletter with several articles, easy-to-spot headlines keep the reader oriented and allow them to find quickly just what they want to read.

4. White Space

Like illustrations, white space on the page rests the eye, giving the reader a short "breather" from text, pictures and information. White space makes a piece look friendlier than a page covered with type. Concise writing, rather than a lot of words, will give your points more impact. If there's no relief on the page, your piece just won't get read. Incorporate white space between columns and between paragraphs, have extra space before and after headings and subheadings and around illustrations, and make sure there are adequate margins on the page.

5. Line length

Another element that creates white space is line length — that is, the width of the lines of type on the page. An 8½ × 11 page that has words clear from one side of the page to the other is difficult to read. Once you've gotten to the far right-hand side of that wide line, your eye has trouble holding its horizontal place on the page, so

you end up reading the same line twice or skipping a line.

To avoid this problem keep line lengths to five inches or less and put your text into columns. Be careful not to have the columns too narrow, though, because you end up with lots of hyphenated words, which also interferes with reading flow.

6. Subheads

If your piece is long, you can give the reader needed breaks while keeping them interested in continuing. First, see if you can make your paragraphs shorter. Either shorten the sentences in each paragraph, or divide what may seem like a single idea into a couple of paragraphs of related ideas. Once something is set in four- or five-inch line lengths, even short paragraphs look long.

Another useful approach is to break the text into sections and give each section a title or subheading. These subheadings should be short descriptors of the material to come, in bold type either flush left or centered.

7. Type Styles

Some typefaces are easier to read than others. For copy that is longer than a headline or a short piece (such as an invitation or announcement), a "serif" typeface is generally used. Serifs are the short strokes that "decorate" the letters, such as on the type you are reading now. These short strokes help carry the eye from letter to letter and therefore ease reading. Headlines and shorter pieces will often be set in a "sans serif" typeface — as they are here in the *Journal*. These create contrast and have a declamatory feel.

In general, don't use more than two typefaces in a piece. Standard complementary typefaces often used in tandem are Helvetica (a sans serif face) for headlines and Times Roman (the typeface of the London *Times* — an authoritative typeface) for body copy. With the plethora of fonts now available on the computer, it's fun and easy to play around with myriad typefaces. In the end, though, readability must come first, and matching serif and sans serif faces can be a hit-or-miss proposition without more sophisticated knowledge of design principles.

Within each typeface, there are options for italic, bold, and other variations to lend emphasis to text. Keep a piece clean by not overdoing emphasis. Excessive use of underlining, bold, and italic are tiring to the eye and make the reader feel manipulated. Use these eye-catchers sparingly. And never use all caps to emphasize a word. In e-mail parlance, the use of all capital letters is called "flaming" because it makes the reader feel screamed at. Use italic for emphasis.

Many fundraising appeals arrive with handwritten notes in the margin, line after line underscored, dozens of exclamation points in the text, or whole phrases or sentences in all capital letters. These techniques will not stir your readers to action beyond wanting to dump the piece in the recycle bin as soon as possible. Lucid prose and a strong argument will make a much better case.

A final point about type: be sure to make it large enough. If you have so much to say that your graphic designer or computer person is having to use a smaller type size (measured in "points"), decide where you can cut the piece rather than expect people to strain to read smaller print. Most people won't read words that are in "fine print." Keep your pieces to no less than 12-point type with adequate "leading" (white space between the lines) and it will be more likely to be read. GFJ

NEXT: WORKING WITH PRODUCTION PROFESSIONALS

NANCY ADESS IS EDITOR-IN-CHIEF OF THE *GRASSROOTS FUNDRAISING JOURNAL*.

MY Adventures IN Fundraising

My Trip to Los Angeles

BY SHAHIRA TEJANI

In this article, a young fundraiser explores some differences between canvassing and personal solicitation. As Ms. Tejani describes, one of the difficulties in fundraising is knowing what people mean when they say things like, "I'm busy" or "Tomorrow would be better." Most people err by reading too much between the lines and back off at any hint of rejection. Some overcompensate and annoy their prospects. Moreover, what is perfectly acceptable behavior with one donor may appear obnoxious to another and not assertive enough to yet another. Further, as this article shows, a donor can be welcoming one day and not so receptive the next. Most fundraisers find that the solution to this dilemma is three-fold: 1) don't take things personally and forgive yourself if you feel you went too far or not far enough; 2) take people at their word — it is better to be persistent and not get your meeting than to interpret "come back tomorrow" as "no" when the person may well have meant "come back tomorrow"; 3) always seek permission for the next step in the donor relationship. For example, a major gift solicitation typically begins with a letter introducing the fact that you intend to call; the caller starts by asking if this is a good time to talk; the visit is preceded by setting a date for the visit and so on.

I've always had a soft spot for LA. Despite all the traffic, pollution, and broken dreams, it's still got heart.

I work at California Peace Action (CAPA), an organization working for social justice by lobbying against militarism. Though I've been in the Bay Area about a year and a half now, I started working for Peace Action in Los Angeles and I always see my roots there. I want to share with you my first major donor solicitation but there's a little background to the story, so bear with me.

I started as a canvasser with Peace Action. We go door to door and describe our work to reduce militarism to whoever answers the door and will listen, and, if they are receptive, we ask them to become members of Peace Action with a financial contribution. What an amazing experience to see how people react to militarism in the most militarized country in the world! Nothing compares to canvassing. I don't know of anything else that can be so rewarding and fulfilling and at the same time keep you constantly on your toes.

On one of my canvassing outings in LA, I met a wonderful teacher named Grace who was very supportive of our issues and so willing to contribute. I believe she is the only person I ever asked for money who offered to give more! She worked to teach her school kids the basic principles of foreign policy, and what NATO and NAFTA are. She said she was very pleased when a student around nine years old asked, "But Ms. Grace, if Russia is no more, then why are they adding countries to NATO?" She was also starting an Internet exchange program where children from Brazil and the US could communicate about their thoughts on the state of the world. It was such a great meeting that in the end we hugged like old comrades.

As my experience with CAPA progressed, I was accepted for an internship with The Grassroots Institute for Fundraising Training. GIFT teaches people of color fundraising principles and skills so they can help their groups create and maintain a self-sufficient funding base that is less dependent on grant funding. Major gift solicitation is one important strategy they teach.

Major gift solicitation is a bit different than canvassing. When canvassing, you are meeting with total strangers and establishing a connection. With visits to potential major donors, the connection to the organization has already been made, whether by you or someone else, and you just have to meet the people — some may be known to you, some may be strangers — to continue that connection. Similar, but different.

During my time canvassing, I had asked thousands of people for support, but I had never really asked for large sums of money. After training with GIFT and Peace Action, I had information coming out of my ears on how to begin a major donor visit, address all the issues, and

show our effectiveness and all we have accomplished. By the time my GIFT training was over, I even had my very own Visit Book where I could show CAPA's various pieces of literature, including all the media coverage we had received from a direct action campaign we had done that summer. All I needed was someone to visit. I remembered Grace, the wonderful, enthusiastic, supportive teacher. She would be great to have a major donor visit with.

As it turned out, I planned to go to LA to join the protests at the Democratic National Convention last fall. Since I would be in the area, could I not have my first high donor visit with her then? I wanted to call her to see if we could schedule a meeting, but didn't have a phone number for her. Even though I was taught that the first step in asking for a large gift was to set up a meeting ahead of time, I thought it wouldn't hurt to take a chance and go to her house. Peace Action calls these visits Development Runs. So as not to lose a supportive member who contributes to our political power, legislatively and financially, we stop by to give them an extended update. I was also given a few other members to visit who were prospects for a major gift, but who hadn't responded to attempts by mail or phone to renew their contributions in over a year.

So in between protests at the DNC, I went to Grace's house. She recognized me instantly. Had it already been a year since we'd met? It seemed as if we had just talked yesterday. She said she was busy, so we made an appointment to meet the next day at the same time.

The next day I went by her house again, but when I knocked, no one answered. What? But we made an appointment. We have a connection. We've hugged, and she's not here! After I rang and knocked for about fifteen minutes, it sank in she really wasn't there. I had to accomplish something, so I left a note and started visiting the other members on my list.

One had moved and another wasn't home. Finally, someone was home. Her name was Erin, and CAPA hadn't talked to her in almost two years. She was very welcoming and invited me out of the heat into her cool home. Her sister was visiting and they invited me to join them in the living room. We started an open, general interaction, getting to know each other and reacquainting her with the issues CAPA works on. I asked what she thought of the actions at the DNC and told her about our presence there as part of a huge direct action campaign we had embarked on that summer. We talked about a lawsuit that CAPA's sister organization, The CAPA Education Fund, went through to get ads critical of nuclear weapons on mass transit systems. She loved the images in the ads, which had been censored. Finally I showed her our full-page ad in the *New York Times* on the first day of the DNC to display the wastefulness of Star Wars funding. She was impressed that so much could happen in such a short time. She said she didn't have much time, but she was aware that I needed something from her. I asked her to be a sponsor for us. She enthusiastically agreed. Twenty minutes and $500 later, I was out the door. Wow! I had never done anything like that before.

I still hadn't given up on Grace, though. I went by her house again. There were lights on now, and I rang. "Who is it?" someone asked through the door. "Hello, my name is Shahira and I had an appointment earlier with Grace." "Hold on, let me see if she's available." (Dialogue in the house: "Grace, it's someone you had an appointment with earlier, Shahira. Do you want to talk with her? I can tell her you're on the phone.")

The door opened, "I am sorry, Grace is on the phone." I learn that this person is Grace's mother. We got into a very delightful conversation about the work CAPA does, and the work I do for the organization, and how Grace and I met, and why I thought she was so great. We talked for almost half an hour on that doorstep. This woman, whom I had never met before, ends up telling me how proud she is of me, and how happy she is that such organizing is taking place, but not once did she offer to check to see if Grace was off the phone, nor did Grace come out, and I was not invited in.

I am still puzzled as to why Grace agreed to meet with me and then didn't follow through. I don't know if she felt pressured to agree to the meeting the day before and really didn't want to, or just that it turned out to be a bad time for her and she was embarrassed to tell me that. In any case, I realized that while major donor asks and canvassing have something important in common — they're both face-to-face solicitations — asking someone for a large gift in person is more successful (and less anxiety producing for both parties) if you make contact ahead of time and know that the prospect is willingly agreeing to a meeting. I should have sent a note to Grace explaining that I did not have her phone number, and would be coming by her house to set up a time to visit. By including my phone number and e-mail address, she might have responded with a good time, or with the fact that she was too busy to meet with me.

But I also learned that, while there's a process to follow that makes sense, sometimes you can be pleasantly surprised by a situation like the one I had with Erin — people who are moved at a particular time by a particular experience and give a much bigger gift than you ever expected. GFJ

Two THUMBS UP FOR *Three* VIDEOS

BY JOAN FLANAGAN

It can be tough to be the fundraiser in your organization. Sometimes it feels as though other people just want you to be a faucet they can turn on and see money come out. No matter how fast you are at raising the money, someone else can always spend it faster. Even worse, the kinds of problems we want to solve in our communities will need much more work, and thus much more money, in the future.

The best way to solve this dilemma is to look at fundraising as organizing. Your job is not just to raise the money. Your job is to find and train other people to understand why building a broad base of dependable givers is vital to building a permanent, powerful organization that can win victories.

Videotapes are a great way to help your leaders and colleagues understand how the development process works. Here are two tapes I recommend to improve fundraising for your board members and staff, along with the classic Kim Klein video series.

How to Build A Highly Profitable Monthly Donor Program

starring Harvey McKinnon

1997. 60 minutes. $59.95 from Harvey McKinnon, (800) 815-8565. Grassroots folks can get 15% off and he offers a money-back guarantee.

In retail they say, "You don't want to make a sale, you want to make a customer." In fundraising, Kim Klein has taught us we don't want to chase fickle foundation funding; instead we want to create dependable income streams from committed individuals.

One of the best ways to do this is to get your most loyal donors to give to you every month instead of once a year. The master of the monthly giving system is Canadian Harvey McKinnon, who has a great videotape to convince you, your leaders, and your boss (if need be) to start a monthly giving program.

McKinnon's videotape, "How To Build A Highly Profitable Monthly Donor Program," features many compelling arguments for moving frequent donors onto a system of giving every month, ideally through an electronic fund transfer (EFT) system (the same way that many people pay their mortgage or utility bills), credit cards, or monthly reminders. You will learn how to find the best prospects for monthly donors, how to promote the program, and how to thank the donors.

McKinnon repeatedly reinforces the idea that what drives the system is that it is convenient for the donor — convenient and controlled by them. Best of all, it is *not* labor intensive. He reports that Oxfam Canada raises more than $2 million each year with its monthly donor system, with only one person staffing the system.

Although the production values of the tape are relatively crude because it was taped at a workshop presented at the National Society of Fund Raising Executives' (NSFRE) international conference, the positive side is that you get real fundraisers asking questions like you would ask. You also get a flavor for McKinnon's amusing and insightful presentation style, which you can catch in person at the 2001 NSFRE conference in San Diego, March 11–14. Go to *www.nsfre.org* to get more information on this conference; find your local chapter at the same Web site and contact them for information on scholarships for the conference.

(For the nuts and bolts of developing a monthly donor system, get McKinnon's book, *Hidden Gold*, for $39.95 from *www.chardonpress.com*.)

Speaking of Money. A Guide to Fund-Raising for Nonprofit Board Members

hosted by Hugh Downs

30 minutes, plus 20-page user's guide by Kay Sprinkel Grace. 1996. Order from the National Center for Nonprofit Boards, (202) 452-6262 or www.ncnb.org.

The National Center for Nonprofit Boards has produced a great tape to inspire your board members to ask for money. With ABC News journalist and chairman of the US Committee for UNICEF, Hugh Downs, serving as anchor, the tape is very professional. You get examples from ten successful board members from real organizations, from the San Francisco Food Bank and the National Black Women's Health Project to the Atlanta Symphony and Grace Cathedral. Although none of the examples is remotely grassroots, the interviews will work well with

your leaders, too. The speakers are candid about their own reservations about asking for money and share some of their faux pas that will reassure your leaders that you do not need to be perfect to be a good fundraiser.

You learn why the board should ask, how to cultivate donors, how to make the case for your organization, how to ask, and how to maintain the relationship with your donors. The excellent workbook includes a self-assessment quiz and many useful discussion questions.

Patricia Shull, the Executive Director of Adult Care for Chester County (PA), who introduced me to this tape, recommends it for three reasons. First, she says, it shows the board that their responsibility to raise money is "not just my idea." Second, it makes it easy to get new members up to speed. When three new people joined her board in January, she showed them the tape so they could know what the veterans know. Third, for United Way agencies, part of the peer review process is to look at the educational activities offered to the board. Videotapes are a good way to offer board training.

Grassroots Fundraising: The Kim Klein Video Series

starring Kim Klein, presented by the Headwaters Fund.

Seven tapes, about 20 minutes each: The Basics of Fundraising; The Role of the Board; Asking for Money; Major Gifts; Direct Mail; Special Events; and Donor Loyalty. 1994. Order from The Headwaters Fund, (612) 879-0602 or fundraisingvideos@headwatersfund.org. Priced on sliding scale according to organizational budget.

I think Kim Klein is the finest teacher in the world, and I've always recommended her fundraising videotapes as extremely helpful. Just in case I was blinded by admiration, however, I checked with two excellent professional fundraisers in Chicago who have used her tapes to inspire themselves and their volunteers to raise more money.

Rhonda Brown Saffold is the Director of Development at Marwen, an organization that provides arts education, college planning, and career development programs — all free of charge — to underserved youth in grades 6–12. At an NSFRE conference, Rhonda mentioned to me that she used and loved the Klein videotapes, although she has never seen Kim train in person. She says, "Each time I make an ask for Marwen, I remember to take myself out of the equation and let Marwen's mission speak for itself. It helps to get rid of the fear of hearing 'No.' This is one of Klein's teachings!"

Saffold adds, "Klein's common sense, call-to-action, strategic approach to fundraising really helps to take the fear out of asking. Her videotapes are fun, educational, and incredibly instructive for your staff, board of directors, volunteers, as well as seasoned development professionals."

When she worked for the Chicago Foundation for Women, Kris Torkelson used Kim Klein's videotapes to help grantees, especially grassroots organizations working with low-income women and girls, to learn about fundraising. Now Kris is the Deputy Director at Urban Gateways: Center for Arts Education, that provides multicultural arts programming to Chicago area students, teachers, and parents. She uses the Klein tapes to train new staff and board members, and she especially recommends them for use with your committees that actually go ask for money. She says, "Klein's tapes are entertaining, and they are structured is such a way that you can use them in 30- to 40-minute sessions. So the information is easily digestible for your volunteers. For example, I just used the section on Major Gifts with my development committee, and then went easily from Klein's presentation to our own conversation." GFJ

JOAN FLANAGAN IS A NATIONALLY ACCLAIMED FUNDRAISING TRAINER AND CONSULTANT, AND AUTHOR OF NUMEROUS BOOKS AND ARTICLES, INCLUDING *THE GRASSROOTS FUNDRAISING BOOK* AND *SUCCESSFUL FUNDRAISING: A COMPLETE HANDBOOK FOR VOLUNTEERS AND PROFESSIONALS.*

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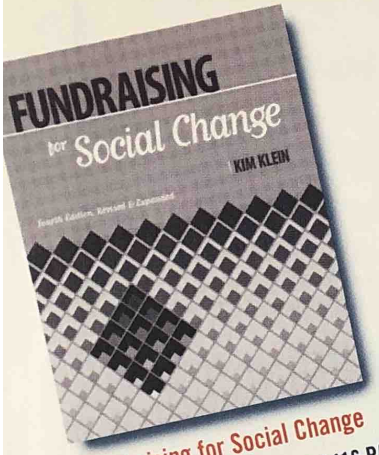

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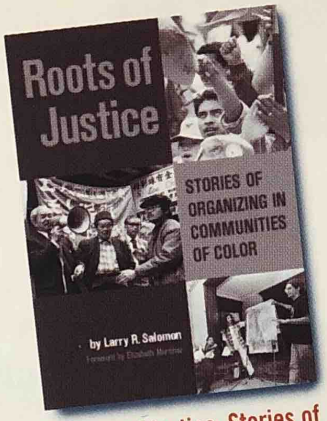

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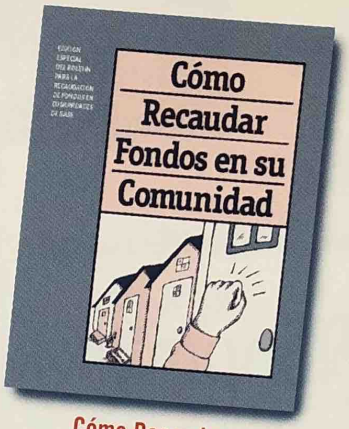

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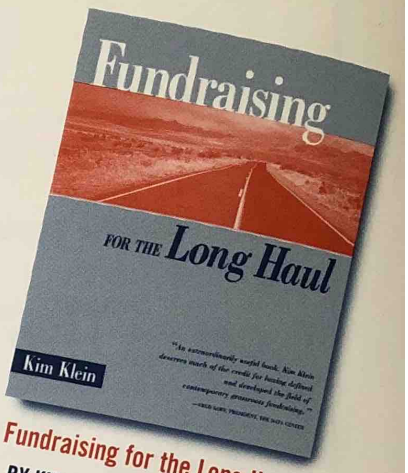

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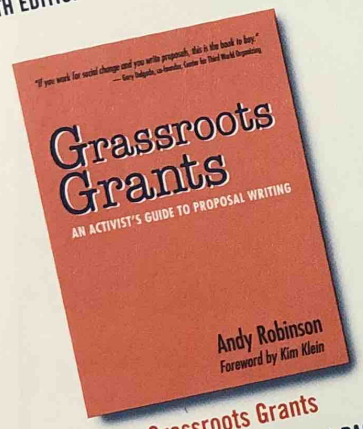

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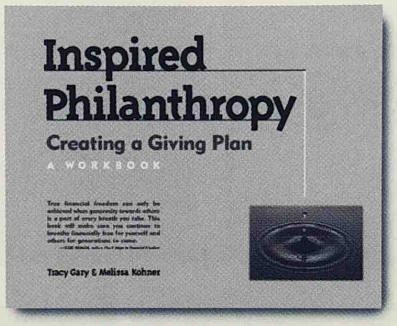

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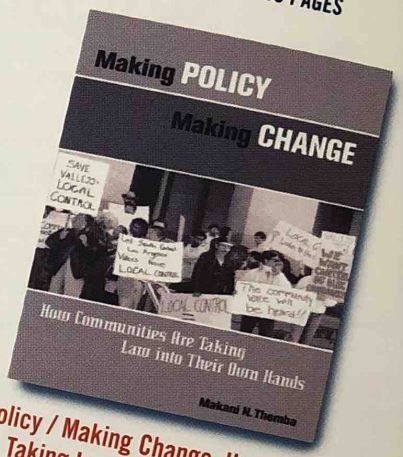

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