

HELPING YOU RAISE MORE MONEY — OUR 20TH YEAR!

Grassroots Fundraising Journal

VOLUME 20 ■ NUMBER 5 ■ SEPTEMBER/OCTOBER 2001

Featuring:

**CARING FOR EACH OTHER:
PHILANTHROPY
IN COMMUNITIES
OF COLOR**

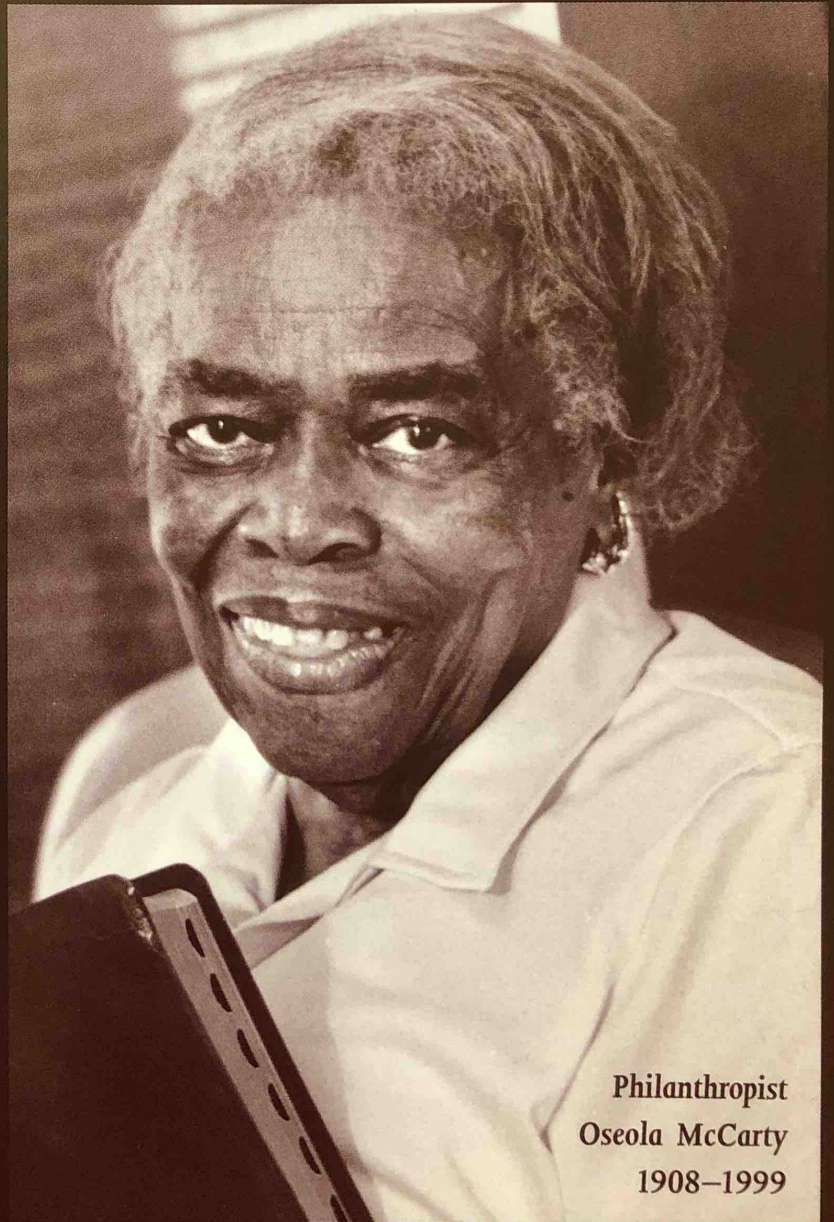
LISA DURÁN

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**TESTING THE FEASIBILITY
OF YOUR CAPITAL CAMPAIGN**

**FUNDERS RESPOND TO BUSH'S
FAITH-BASED INITIATIVE**

**MY ADVENTURES IN
FUNDRAISING**



Philanthropist
Oseola McCarty
1908–1999



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On Our Cover OSEOLA MCCARTY SPENT A LIFETIME WASHING AND IRONING OTHER PEOPLE'S CLOTHES. IN 1995, WHEN SHE WAS 87, SHE HAD SAVED ENOUGH MONEY TO GIVE \$150,000 TO THE UNIVERSITY OF SOUTHERN MISSISSIPPI. HER DONATION ESTABLISHED A SCHOLARSHIP FUND TO BENEFIT AFRICAN-AMERICAN STUDENTS. "I CAN'T DO EVERYTHING," SAID MCCARTY, A DEEPLY RELIGIOUS WOMAN, AT THE TIME OF THE GIFT. "BUT I CAN DO SOMETHING TO HELP SOMEBODY. AND WHAT I CAN DO I WILL DO. I WISH I COULD DO MORE."

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LETTER FROM THE PUBLISHER

KIM KLEIN

Every year at the end of May I wait eagerly for a press release from the American Association of Fund Raising Counsel about their annual report, Giving USA. The first time I read this report, in 1976, I realized that I would forever be a different person because of it. I had this experience often in the '70s as I read feminist literature and analysis, and later as I read liberation theology. But reading Giving USA was the first time I had this life-changing feeling from an apolitical report.

The information in Giving USA changed my life because it told me two powerful facts: that individuals were the largest source of money given away and that religion was the largest recipient.

At the time I was studying to be a Methodist minister and I knew something about how religious institutions raised money. As I read this report, I saw clearly that the key to fundraising was assembling a team of people who would each ask as many people as they could for as much money as they needed. My message ever since (and the message of all good fundraisers) has been, "If you want money, you have to ask for it, and if you ask enough people, you will get the money you need."

Twenty-five years have passed since I first read Giving USA, but each year I still have a little thrill in watching the numbers increase and seeing the trends. So let me share that thrill with you.

According to the 2001 edition of Giving USA, total giving in 2000 reached \$203.45 billion (that's billion, with a b), which was an increase of 6.6% over the previous year. Religion still walked away with the lion's share of donated funds, reaching \$74.31 billion or about 36.5% of the total.

In 2000, living individuals gave almost 75% of all the money given away; bequests accounted for another 7.8%. When those two figures are combined, it is clear that individuals, living and deceased, continue to be the largest source of money in the private sector, representing almost 83% of the total.

Many people set up foundations with their highly appreciated assets. Bill and Melinda Gates continued to donate to the foundation named for themselves. Their most recent gift of \$5 billion to their foundation makes the Gates Foundation the largest in the United States.

Along with gifts to foundations, foundation giving to nonprofits went up almost 20%, to a total of 12% of all money given. This also represents the strength of the stock market. (Groups that are heavily funded by foundations today will want to start diversifying their sources of income, as the plunge in the market will cause a decrease in foundation giving over the next couple of years.)

Corporate giving also went up significantly — 12.1% over last year — but corporate giving remains fairly low at 5% of all funds given. In fact, although corporations are allowed to deduct up to 10% of pre-tax income to charity, they only give away 1.2%.

So, once again, we see not only that there is money out there, but exactly where it is. Go get it!

I also call readers' attention to our new book, *Raise More Money: The Best of the Grassroots Fundraising Journal*. This is part of our celebration of 20 years in continuous publication. The book is an anthology of the best and still useful articles that have appeared in the *Journal*. You'll find an ad for it on page 16 or on our website — \$28 and worth ten times as much. Order today!

Caring for Each Other:

PHILANTHROPY IN COMMUNITIES OF COLOR

BY LISA DURÁN

Philanthropy in communities of color has historically gone unrecognized. In fact, many assume the relationship between philanthropists and ethnic communities is one of giving to people of color by people who are not. The majority of studies about philanthropy in America have focused on elite philanthropy, that is, the philanthropy of affluent white donors. These views are erroneous, a form of stereotyping, and at worst they perpetuate a subtle form of racism that continues to disempower communities of color in relation to whites.

In fact, philanthropy in communities of color has a long and vibrant history in the United States. Its form has been shaped by traditions of immigrant homelands and the experiences of minorities as they have had to struggle together to survive. It is crucial to publicize these histories in order to help re-construct communities of color as givers, not only receivers, and as important shapers of our society. Understanding the different ways that giving practices are culturally embedded should help to foster understanding and mutual respect.

Up to now, definitions of philanthropy have been dominated by a view that emphasized "charity," the detachment of professionalism, the benefits of tax deduction, and giving through charitable institutions. An examination of the ways communities of color give demonstrates that there is ample room for re-shaping this view to be more aware, inclusive, less detached, and respectful of difference.

People of color are philanthropists, whether philanthropy is defined as giving through what is called "institutional philanthropy" — that is, money given to established charities — or as giving goods and services outside the nuclear family without any apparent expectation of economic return. Traditional definitions of philanthropy have tended to focus on giving money, but newer views also include the giving of time, shelter, or other material resources as philanthropic activities. This definition allows for a broader conception of philanthropic behavior. I have reviewed the literature of philanthropy among communities of color and have found a vital philanthropic history with elements in common. Some of the commonalities

spring from the experience of being people of color in a U.S. society still tainted by white supremacy; some from the common experience of immigration.

AFRICAN AMERICANS

Perhaps the best-documented historical cases of philanthropy in communities of color have occurred in African-American communities, beginning in the colonial era with the founding of black churches, fraternal orders and mutual aid societies. These included the Fraternal Order of Prince Hall Masons (1775), Boston's Sons of Africa Society (1788) and the African Union Society (1781). These institutions provided support and aid to blacks, providing places to worship, pensions for widows, and aid to the poor. Many also worked to abolish slavery. They were so effective that several states established laws to ban fraternal organizations and mutual aid societies. The history of African-American philanthropy includes many organizations whose purpose was three-fold: *humanitarian*, as aid to ameliorate suffering; *self-help*, emphasizing black schools, colleges, hospitals and insurance companies; and *social change*, fighting for the abolition of slavery and later to end barriers to racial equality.

Black churches have been critical in the development and support of philanthropic behavior among African Americans. Gratitude for their role and a sense of self-determination result in broad support among African Americans, since the church is a community-rooted, black-run institution, historically controlled by its own, and one of the few that have not abandoned the inner city. In 1995 churches received two-thirds of black charitable dollars; more recent figures put black giving to churches at the slightly lower rate of 60% (on a par with the overall population), as African Americans begin making gifts to non-traditional charities, such as scholarship and creative writing programs.

Other organizations, including women's clubs and Greek societies, have also served as both recipients and sources of philanthropy in the African-American community. One example is the Mother Society of New York, which supported black women in that city in the 19th

century. *Freedom's Journal*, a black newspaper published in the early 1800s, estimated in 1829 that there were only 43 poor black women in New York, compared with 472 poor white women, largely as a result of the Society's work. The National Association of Colored Women, whose membership in 1916 was 50,000, with 1,000 chapters in 28 states, also provided philanthropy in the form of support for the war effort during World War I, despite the sharp increase in lynchings during that time.

Longstanding oppression has encouraged blacks to develop what one author calls a "communal tradition of caring for each other." Even during difficult times, the less fortunate have been supported in that community. This support has come from wealthy and well-known African Americans who made great fortunes, such as Madame C.J. Walker, the first black woman millionaire, who supported a number of educational and other aid projects in the early 20th century; Bill and Camille Cosby, who donated \$20 million to Spelman University in the early 1990s; or singer Ray Charles, who recently donated \$2 million to Wilberforce University, a private black college in Ohio. But it has also come from people like Oseola McCarty, the legendary laundry woman who, through a life of humble labor, saved enough to donate \$150,000 to the University of Southern Mississippi in 1995; or Matel Dawson, Jr., an autoworker who, over the course of his lifetime, has given \$1 million to local charities.

Although these large contributions often stir greater notice, trends of giving within the African-American community show that its members have always been frequent and customary givers. Studies of giving show extensive informal networks of support, such as when mothers send their children to the neighbors to collect quarters for those in need, or when African Americans work to meet the high expectations of their communities for mutual support and to "give back" to their communities.

Obviously, this information conflicts with the view of African Americans as primarily recipients of charity. Indeed, there is disagreement about the extent of giving in the African-American community. The Independent Sector, a highly respected organization that tracks giving and volunteering in the United States, reported in 1996 that 53% of blacks surveyed gave compared with 73% of whites. They gave three reasons for lower black (and Hispanic) giving: a much lower average household income than whites; a lower percentage of married respondents; and a much lower proportion with college degrees. Other studies found that, despite differences in income, blacks, Hispanics, and whites were equally likely to make charitable contributions and that the sizes of their contributions were about the same. The Carson finding is especially noteworthy because of differences not only in income, but in net worth, or assets.

For example, white families in the U.S. with annual income of less than \$15,000 are nevertheless likely to have net worth of \$10,000; black families with the same income, however, show a median net worth of zero or negative (debt). At the other end of the income scale, white families with incomes of \$75,000 show a median net worth of \$140,200, while a black family with the same income has a net worth of \$54,000. Despite this widening wealth gap, African Americans at all income levels continue to make contributions.

Finally, it should be noted that African-American philanthropy has always been linked with social justice, so that groups may well provide charity for down-and-out families while at the same time they were fighting for suffrage, the abolition of slavery, against lynching, or for equal rights.

LATINOS

Philanthropy in other communities of color is not so well researched, but these communities also have long histories of philanthropic behavior. The Mexican-American community is one example. Since the U.S.-Mexican War ended in 1848, there has been a flow of Mexican immigrants to the southwestern United States who joined long-established Mexican-American communities in Texas, New Mexico, Colorado, Arizona, and California. These communities created *mutualista* (mutual aid) organizations designed to help newcomers get settled, provide burial plans, or to serve as a community insurance pool, as well as fight against the racism they encountered. They also served as preservers of social networks, with some regularly sponsoring fiestas and dances. They have played key roles in supporting the less fortunate in their communities and in fighting against segregation, for suffrage, and for better schools and conditions in Mexican-American communities. Though these *mutualistas* existed up to the 1960s, they have historically escaped the notice of scholars studying institutional philanthropy.

Latinos tend to give informally, through familial or social networks. In these communities, both the poor and the emerging middle class give in large numbers, particularly in response to specific events such as hurricanes or earthquakes in Latin America, pressing community needs, or important family occasions. Though much of this philanthropy falls below levels that could be recorded on tax returns, the Latino community in America is also developing its star donors, such as Alberto Vilar, a Cuban-born investor who recently donated \$50 million to the Kennedy Center for the Performing Arts.

The element of *personalismo* is key when Latinos decide where to give: knowledge of the recipient is more likely to result in a gift. Especially among those who themselves immigrated, helping others get settled in the U.S.

can include offering shelter, food, clothing, and work recommendations for as long as necessary. These recipients of charity may or may not be family members.

Remittances to family members or communities out of the country also account for a large portion of giving. In many cases, Latino immigrants send more than 10% of their earnings back to their families and home villages. One estimate is that remittances to Mexico total as much as \$4 billion a year, providing Mexico's second-largest source of foreign income after oil. Workers' remittances help pay for such things as church renovations, village wells, and roads as well as family necessities. Much of the giving by Guatemalans and Salvadorans is also through remittances to their homelands.

As with African Americans, the church is a recipient of the most significant portion of institutional giving by Latinos. Previously, this would have been largely limited to the Catholic Church, but fundamentalist Protestant denominations have increasingly attracted Latinos to their practice and to giving. Special events, especially with religious significance, such as baptisms, *quinceañeras*, and weddings provide other opportunities for giving. Perhaps because of the long history of discrimination against Spanish-speaking immigrants, Latinos also tie some of their philanthropic activity to social justice. One study shows that organizational membership and philanthropic engagement are strongly linked to political participation, especially among Puerto Ricans and Mexican Americans.

ASIANS

Giving among American Indians and Asians appears even less well documented. This may be attributable to the relative size of these populations on a national scale, or it may reflect the way traditional philanthropic research has ignored ethnic communities to focus on the more numerous white givers. The frequently cited Independent Sector's biennial study, *Giving and Volunteering in the United States*, does not include these populations in their demographic categories. Still, work has been done to illuminate their philanthropic histories.

Among the diverse Asian communities, giving patterns share some similarities to Latino giving, perhaps because of the immigrant base of these communities. (Of course, to speak of Asians implies a homogeneity among the Filipino, Chinese, Japanese, Korean, Southeast Asian, South Asian or Pacific Islander populations that in fact have diverse languages, cultures, traditions, and religious bases. However, some generalizations have been made about Asian giving practices.)

As among Latinos, Asians in the U.S. give more informally, give when there is a personal connection to a cause

or an organization, and give to help newcomers settle in this country. Mutual aid societies have been an important part of the histories of Chinese, Japanese, and Filipino communities in America. Korean- and Vietnamese-American associations exist as well. In addition, immigrant families provide billions of dollars in remittances to families in their home countries, with estimates that Filipino Americans remit up to \$6.4 billion each year, Bangladeshis \$1.6 billion, and Vietnamese-Americans \$500 million annually. The practice of *balikbayan* among Filipinos, that is, bringing gifts when people return to the Philippines to visit their families, is another important form of philanthropy. So important was this income that the Marcos regime set up government programs to offer benefits to the givers.

For Koreans and Japanese, a large amount of giving is tied to religious practice, especially Christianity and Buddhism, respectively. Religious teachings of compassion, service to others, and the relatedness of all things make giving for these groups integral to everyday life; philanthropy, as such, is not considered a separate activity. Chinese communities have a venerable history of political giving, established in the early part of the 20th century. One study found that political factions within the Chinese community were very skilled at getting donations for their causes. While much of Asian giving, particularly among the more recently arrived, is ethnic-specific, a consistent finding is that Asian-Americans give to both ethnic-specific and non-Asian causes. Studies have also consistently found that Asians can be characterized as "substantial givers," giving more than 2.5% of their household income to charity.

INDIGENOUS PEOPLES IN THE U.S.

An important theme in giving practices among the American Indian peoples of the United States is the role that culture plays in their philanthropy. In traditional Native-American societies, giving is a form of sharing, not charity, that "bonds you within the group, because you have provided a series of gifts that allow the group to prosper," says one indigenous philanthropist. The focus is on the exchange and the relationship of the giver and receiver in the larger context of community. This differs from traditional philanthropic practices that tend to separate individuals from their settings.

As with other cultures, Native Americans practice much informal giving within family and community. Specifically, Native American practices such as giveaways and potlaches reflect the regional and local characteristics of the more than 200 language groups of the indigenous peoples of the U.S.

Native Americans also support tribal foundations and tribal giving programs, as well as non-tribal funds. One study found that tribes that are more traditional tend to

consider the cultural and spiritual relevance of their giving more important than do more progressive tribes. The latter consider education, the arts, economic development, and entertainment as important causes for which to give. As with other groups, givers like to know the group or individual to which they are giving, but they often prefer to keep their gifts anonymous.

Differences in philanthropy among the Indian peoples of the United States may vary according to whether a donor is giving from wealth through tribal rather than individual means. Tribal vehicles for giving include tribal councils, tribal enterprises, tribal government, inter-tribal consortia, and foundations. Reservation-based individuals show differences in giving when compared with those who live off the reservation. They tend to support tribally sponsored charities, the needs of individual tribal members, educational scholarships, and sports activities, while non-reservation-based individuals were found to support historical and cultural projects, human services, and church-related activities.

NEW WEALTH IN COMMUNITIES OF COLOR

A common story among all communities of color is the growth of their middle classes. This growth provides opportunities for new forms of philanthropy. As communities live out longer histories, they make a significant step from "survival" and need-based strategies of giving, often done on an emergency basis, to giving from a concern with "legacy," motivated by desires to help improve the quality of life in one's community. This shift creates important questions about the ways that communities will choose to manage their giving as they accrue wealth.

One notable form of this new giving is the much-touted "intergenerational transfer of wealth," that is, wealth that will be donated from the estates of aging baby boomers. The sheer size of this wealth transfer, estimated to be on the order of \$10 trillion (or \$6 trillion after applicable taxes), over perhaps as long as 55 years, represents a new order of opportunity for the recipients of this largess. The demographic of the givers signals that the giving will likely look different than traditional philanthropy. While there is no racial breakdown of where this money will come from, some of it will surely reflect the expanding upper and middle classes of communities of color.

Another form this wealth is taking is that of community funds. Local funds are being established as an alternative to federated funds such as the United Way in order to capture wealth from working people in the community and to ensure that those funds will be spent in that community. In particular, many community funds started because mainstream funds and banking institutions were not adequately serving communities of color. While the

oldest of these is the National Black United Fund (NBUF), community funds also exist in the Latino, Asian, and Native American communities.

An issue unique to American Indian community funds is the perception by the larger community that the growth of gaming on reservations means that indigenous peoples no longer need assistance. However, only a few tribes have eradicated poverty with gaming income, and many tribes do not have the option of establishing gaming. In fact, according to one report, despite the presence of gaming among some Indian tribes, poverty has increased on nine of the 10 largest reservations that house half of the Native American population in the United States. Still, the new wealth generated by gaming has resulted in new grants to improve the lives of game hosts' tribes.

CONCLUSION

A little digging reveals the depth and breadth of historical giving in communities of color. As we become more familiar with that history, we find lessons in self-sufficiency and self-determination that we can apply to current experiences. We come once more to appreciate the great sacrifices our predecessors made when they gave generously of their substance, not just their surplus, to help their communities and families have a better future. **GF**

LISA DURÁN IS THE STAFF RESEARCHER FOR GIFT, THE GRASSROOTS INSTITUTE FOR FUNDRAISING TRAINING. POLITICALLY ACTIVE FOR 23 YEARS, LISA IS CURRENTLY ORGANIZING IN IMMIGRANT RIGHTS. FIND OUT MORE ABOUT GIFT AT WWW.GRASSROOTSINSTITUTE.ORG.

Further Reading

THE FOLLOWING RESOURCES PROVIDED MUCH OF THE MATERIAL FOR THIS ARTICLE:

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Testing THE Feasibility OF YOUR Capital Campaign



BY KIM KLEIN

But how do we know this campaign will work?" wailed the executive director after a four-hour planning meeting. The goal: A \$1 million capital campaign to renovate a recreation center, including installing state-of-the-art solar-powered lights for the tennis and basketball courts so people could play late at night. Prior to this meeting we had spent three months outlining the case statement, creating the gift range chart, identifying some key prospects, and involving the board in planning and designing the campaign. At this meeting, prospects were assigned, three board members announced how much they were giving, and we set a launch date for the public phase of the campaign. I thought we were ready to go.

"I mean, how do we really know we will be successful?" she was practically keening now.

"You could call the Psychic Hot Line," I said, trying for a lighthearted note.

"I'm serious!" she wailed again. "What will happen if we fail?"

"Yes, what will happen?" squeaked the board chair who moments earlier had practically been ready to begin construction.

"We're not ready," said another board member who had just pledged one of the lead gifts and offered to ask for other lead gifts.

"We need more time to think things through," the director, now much calmer, stated.

And thus another group talked themselves out of

actually starting their campaign in favor of planning to start.

Capital campaigns are scary, and I think it is strange when a board member or staff person isn't a little nervous about starting a campaign. But too often this nervousness is interpreted as "We're not ready," or the more nebulous, "This doesn't feel right," and the group aborts its start in favor of more research, more meetings, more adding and subtracting of numbers, and so on. It is at this point that many grassroots groups hit on the queen of stalling tactics — the feasibility study.

And so it was with the recreation center. They elected to pay a consultant \$20,000 to study whether their campaign would succeed. The consultant talked to each board member, each of whom affirmed their support; he talked to the key donors, who expressed their support; and he talked to people in the neighborhood, who expressed their support for a place their kids could play even at night. The consultant estimated that the group could raise \$750,000. After some discussion, the recreation center decided to do the campaign for \$1 million and plan to borrow the last \$250,000 rather than scale back their plans. In the end they raised \$1.1 million.

I want to use this example to talk about what a feasibility study is and is not, and when and how a group should do one. I go on record now saying I am not against feasibility studies. I have conducted them, I have worked on campaigns that had done them and found them very useful, and I have worked on campaigns without doing

them and have regretted that decision. But I have also seen people spend a lot of time and money on a feasibility study only to reject the information the study provided or to have a completely different fundraising experience than the study predicted.

WHAT IS A FEASIBILITY STUDY?

A feasibility study is a survey of anyone whose agreement and support you would need to succeed in your capital campaign. Included in such a study would be prospective donors, board members, community leaders, and program officers at foundations and corporations that might be approached. The survey asks them to state anonymously what they think about your capital project and what the level of their support might be. Generally the survey is done in three parts: a written survey sent to all the prospects who will be asked for major gifts, a phone survey to a smaller number of donors who will probably be asked for lead gifts, and a handful of in-person interviews or a focus group with key leadership.

The written survey consists mostly of structured multiple-choice questions so that the results can be tabulated. Once those results are in, the consultant looks for any pattern of response or issues that need to be clarified. The results of the written survey form the basis for the questions on the phone survey. On the phone, the surveyor can probe a little more, record anecdotes and examples, and even say, "Our written survey showed X. Do you agree with that?" The in-person interviews are optional; many studies don't include them. They are usually used to help clarify the case or further probe any anomalies found in the phone or written surveys.

A feasibility study is complicated and time consuming to conduct, which makes it expensive. The cheapest study will cost at least \$5,000 and many studies run as high as \$25,000. The size of the campaign will not correlate directly to the cost of the study because a campaign with a low goal will not necessarily involve fewer surveys or fewer phone calls. Because of the costs involved, these studies are usually reserved for large campaigns.

TO DO OR NOT TO DO THE STUDY

There is no need to do a feasibility study in the following situations:

- If you intend to do the campaign no matter what the study shows. I have known half a dozen organizations that spent money on a study only to conclude that the results (showing lack of support) were wrong. They proceeded with their campaigns — some succeeded and some failed.
- If you are going to use the study simply to find out

whether or not you can make your goal. You can discover that easily enough by asking for lead gifts from qualified prospects before the campaign is announced publicly. If they all say no or give much lower gifts than you needed, don't announce your campaign and go back to the drawing board.

- If your goal is under \$2 million, the cost of a full-scale study is not justified. You can decide to do a written survey only or a limited phone survey if you have some specific questions, but what you really need is to go to the lead prospects and see what they say.

You will need to do a study when the following are true:

- The key leadership in your organization has a mixed reputation. I conducted a study for an organization whose executive director had been there 13 years. She was well liked, but as one key prospect said, "The organization has gotten too big for her and neither she nor her board can handle the responsibility of a building." The study showed that unless the group made significant changes in staffing, such as hiring an associate director who could handle a lot of the administration and human resource issues the executive director was not good at, no one was going to contribute.
- Your building project may be controversial in some way. A proposed homeless shelter discovered that they would face major neighborhood opposition if they expanded in the way they envisioned. By slowing the process down, they were able to address neighborhood concerns with public education programs. Once that was done, the campaign proceeded successfully.
- You want to raise more than \$2 million and you have never done that before.
- You want to know exactly what each person will give. Remember that when you get the results of your study, you don't learn that Sally Jones can give \$250,000. You learn that someone has the capacity and willingness to give \$250,000. You will need to figure out who it is.

Let's go back to our recreation center. They seemed to have everything in place, but then got cold feet. Once their study was complete, however, they proceeded with their goal with the confidence of having a back-up plan to borrow money should they fall short. They could easily have formed this plan without spending \$20,000 on a feasibility study. They would simply have had to ask themselves, "What if we fall short?"

Sharp-eyed readers will also have noted that the recreation center raised \$1.1 million — \$100,000 more than they needed and \$350,000 more than their study showed they would raise. Often feasibility studies predict a lower

amount than the campaign actually raises. One reason for this is that many consultants prefer to underestimate than overestimate the amount that can be raised.

The main reason campaigns exceed their goals, however, is that it is impossible to factor in the effect of excitement on the prospects. It is very different for a prospect to talk on the phone about what theoretically they might do for a campaign, should it be launched, than for them to be asked in person by someone they admire. On the phone, a person is sober and serious, and not wanting to mislead. They name an amount that is perhaps a stretch for them, but that they feel confident they will be able to pay. Later, during the real campaign, a friend or colleague comes with a staff person to ask for their gift. They are excited and the prospect gets excited, too, and winds up giving more than they told the interviewer during the phone survey.

Perhaps on the phone a prospect said they wouldn't give at all, but now they don't want to be left out. Their objections, which seemed so big during the phone call, fade in the light of this campaign. This does not mean you should add on a few hundred thousand to whatever the study tells you, but it does mean that you can be quite confident that a well-done study will give a amount that is at or below what you can really raise.

SO, HOW CAN YOU KNOW IF YOUR CAMPAIGN WILL SUCCEED?

How do you know *any* plan will succeed? The fact is, you don't. You have a better chance of succeeding if you have a plan than if you don't, and evaluating your success will be easier if you have a plan — in fact a plan is what makes evaluation possible. A feasibility study gives you an added measure of assurance and will help you define and counter big problems. When raising very large amounts of money, a feasibility study will allow you to discover the

capacity of your donors in a way that would be difficult otherwise, since we have a such a strong taboo about talking about how much money a person actually has.

In my experience, grassroots organizations that are able to raise the first third of their goal from four to eight people will raise the rest of the money to get to their goal. I advise groups to use that guideline as the most reliable indicator of whether their campaign will succeed.

If you want more assurance without having to buy a feasibility study, you can first talk to the people who would have to take the lead for your campaign to succeed. Tell them about the possibility of the campaign and ask what they think about it. Tell them you are "testing the waters," or "getting feedback on this idea." Make the conversation very casual, but pay close attention to what they say.

Make sure your board of directors is on board. If a board of directors does not want to work on the campaign, the campaign is going to go nowhere. People look to the board for leadership. Your board may well be made up of people who cannot make big gifts to the capital campaign. That's fine. They need to make some gift, and they need to be involved in planning the campaign.

The best way to know if you are going to succeed is to take the time to plan properly as outlined in the previous two articles, then implement the quiet phase of your plan. The requests made during the quiet phase give you the most accurate information with the least amount of public risk. **GF**

NEXT: THE FINAL ARTICLE IN THIS SERIES WILL LOOK AT THE MATERIALS YOU NEED FOR YOUR CAMPAIGN, NAMING OPPORTUNITIES, AND REACHING THE DONORS WHO WILL DONATE THE FINAL THIRD OF THE GOAL.

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

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Vol. 19 #3

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FUNDERS RESPOND to Bush's Faith-Based Initiative

The following is a statement from the Interfaith Funders Network concerning President Bush's philosophy that religious organizations should be able to receive federal funding directly. The Interfaith Funders Network is a coalition of religious grantmakers and their allies.

After working full-time for eight years at a junior high school cafeteria in McAllen, located in the Rio Grande Valley of Texas, Yolanda Alvarado was earning only \$5.15 an hour. Some months, she and her husband struggled between paying utility bills and feeding their two small children. Then, two years ago, Yolanda joined other workers along with members of congregations and community organizations through Valley Interfaith, a faith-based community organizing group affiliated with the Industrial Areas Foundation.

Together, Yolanda and other members of Valley Interfaith successfully advocated for the first living wage policy ever enacted by a Texas school district. Subsequently, seven other Texas school districts, one state agency, one city government, and one county government passed similar policies, resulting in 7,500 public employees receiving a guaranteed base wage of \$8.00 an hour — enough to live above the poverty line. Now Yolanda and her husband can afford both to feed their children and pay their utility bills every month.

Valley Interfaith is just one of 140 faith-based, multi-ethnic, multi-issue groups that are helping immigrants and welfare recipients, low-income parents and youth, and the unemployed and underpaid to organize themselves and advocate on their own behalf with decision makers in the government and business sectors. These dynamic groups are creating affordable housing, increasing access to health care, improving public education, and enhancing the quality of life for low-income people and the communities in which they live.

The undersigned organizations share a commitment to social and economic justice and the effectiveness of

faith-based community organizing groups like Valley Interfaith. These groups develop leaders, revitalize community, and model democracy at its best. Consistent with their insistence on maintaining the freedom to speak out against government policies and programs, they do not accept direct government support. Consistent with their commitment to reach out across religions while respecting the sanctity of diverse faith traditions, they abhor any and all discrimination on the basis of religious beliefs.

President George W. Bush's faith-based initiative concerns us deeply. It is founded on the philosophy articulated by Marvin Olasky, the President's adviser and the architect of "compassionate conservatism," in his book of the same title, which asserts that social ills are caused by sin and that social progress occurs through individual change.

We fundamentally disagree with this philosophy. We believe that social problems are caused primarily by a social and economic system that marginalizes poor families. We also believe that collective action, and the individual transformation that accompanies it, produces the longest-term solutions to poverty.

Before the Bush initiative, religious organizations could and did receive government funding to provide social services, so long as they set up separate organizations without religious content to do so. We support this longstanding practice, and are deeply disturbed by the ways in which the Bush initiative would change it. The initiative would provide taxpayer dollars to programs with religious content — programs that would be permitted to discriminate against employees on the basis of their religious beliefs and practices. It would also allow states

to give tax credits to individuals who make charitable donations to religious congregations, then reimburse state treasuries to compensate for these tax credits with federal funds that have been authorized for state welfare programs. This initiative constitutes a flagrant misuse of taxpayers' dollars.

Although the public is continually told that proselytizing would not be permitted under the Bush initiative, we fail to be reassured, since the initiative would consider any effective group, even one that proselytizes, eligible for funding. How would groups with a core commitment to proselytizing segregate that function from their service provision? We also question how the promise of secular alternatives for individuals who do not wish to participate in sectarian social service programs would be upheld.

As the initiative undergoes reconsideration, we urge President Bush to work with the Congress to expand government support for long-term solutions to societal problems. As for us, we are determined to continue supporting the innovative, community-based strategies that faith-based community organizing groups are bringing to the complex issues we face as a nation.

Signers:

- Susan Chinn, Executive Director, The Discount Foundation
- Marjorie Fine, Executive Director, The Unitarian Universalist Veatch Program at Shelter Rock
- Fr. Seamus Finn, O.M.I., Director, Justice and Peace Office, Missionary Oblates of Mary Immaculate
- Sr. Linda Hayes, O.P., Director, Corporate Social Responsibility, Dominican Sisters of Springfield, Illinois
- Madeline Lee, Executive Director, The New York Foundation
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- Regina McGraw, Executive Director, The Wieboldt Foundation
- Marlene Provizer, Executive Director, and Lee Winkelman, Program Officer, The Jewish Fund for Justice
- Charles Shuford, Executive Director, and Kathy Partridge and Frank Sanchez, Program Officers, The Needmor Fund
- Richard Ullrich, Executive Secretary, Marianist Sharing Fund, New York Province
- Marie C. Wilson, President, and Sarah Gould, Executive Director, The Ms. Foundation for Women

A Reader Writes

Dear Kim Klein,

I am grantwriter and professor of grantwriting at two universities. In the case statement section of "Planning a Capital Campaign," (May/June 2001), you describe objectives. The description is accurate but the examples are not.

Objectives should reflect change in behavior or the situation, such as reduce, increase, decrease. The objectives used in your article talk about methods: conduct, perform. These do not measure changes, only activities.

I read grants for many funders and this is a common problem that causes grant readers lots of angst. Because grant funds are so competitive, a well-written goal, objective and methods section can make the difference.

Thanks for listening.

Joanne Riley


Executive Director, Cultural Alliance of York County

Thanks for writing. We hope this helps clarify the subject.

—GFJ

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MY ADVENTURES IN FUNDRAISING

There's Always a Lesson to be Learned

BY JACK R. SOARES, CFRE

Almost immediately after I joined the world of nonprofits, my boss wandered by my desk and asked how plans for the year-end mailing were progressing. "You know, that's our biggest fundraiser of the year," he said, fixing me with his most serious look. "We really depend on that income."

Hmm. First I'd heard of that. "I think we're pretty much on track," I offered, putting on what I hoped was a confidence-inspiring smile.

It was at that point, back in 1973, that my fundraising education started. Although it really is possible to learn from the mistakes of others, it quickly became clear that my own error rate would provide more than enough lessons. I found that the trick is to pay attention and learn, not just smile and nod. My list of lessons learned keeps growing. Here are a few.

Lesson One: Always get it in writing — even if you have to do it yourself — and read what is written. (And keep Lesson Two in mind.)

Before taking on a new job, a promotion, or any major project, know what you are getting into. Do some research. Find out why there's a vacancy, what the expectations and accountabilities are, what resources will be available to you. Time spent talking to other staff, volunteers, clients, and others in the community is always worthwhile. I was once given a company car. "You work late," said the executive director, "you deserve it and I can't pay you more." Happy days. Until someone new took office and demanded the keys back. "I don't see anything in your file about a company car," he said. If you think it is worthwhile, it is worth getting in writing.

Lesson Two: Always ask questions — and keep asking until you understand. Then ask some more. One of my fundraising jobs came with a newsletter for donors. When asked if there was a way to save money on this publication, the printer replied, "You could stop using textured paper, it's pretty expensive. And if you changed the size by just a bit you'd get two copies from each sheet instead of just one." Why hadn't he suggested those cost-cutting measures before? "No one asked," he said. Vendors are a great source of information, but remember that they are in the business of selling stuff to you, so it's a good idea

not only to ask, but also to get a second opinion.

Lesson Three: Cheaper is not necessarily better. With my first job came a storeroom filled with memorial envelopes. How many envelopes no one seemed to know. They had been purchased in volume some years before to get a very good price. There were so many that I mailed 150,000 out to prospective donors and still there were more. We sent them with every thank-you letter. We finally stacked the leftovers — all 250,000 of them! — against a wall.

Not only had we tied up a substantial amount of money to get a good price, we had tied ourselves to one format until the inventory disappeared. Then there was the fortunately faulty assumption that 15% of the San Francisco Bay Area's population would die and be honored by the survivors with memorial gifts to our nonprofit.

Lesson Four: Planning is essential but keep it in perspective. Almost all development offices have a strategic planning accountability. Even without one, it's a worthwhile exercise. As the saying goes, "If you don't know where you're going, how will you know when you get there?" A concerned board of directors once mandated that fundraising revenue increase to at least a set percentage of the operating budget. When projections meeting the mandate were presented, they then wondered how we could do even better and why we hadn't done that well in the past. Watch out for unbridled enthusiasm and ungrounded optimism. Simply doubling or tripling the number of proposals you put out doesn't guarantee double or triple the number of grants. You may have your plans in hand, but are the volunteers and other staff people on board? Eventually someone is going to have to deal with reality — and it just might be you.

Lesson Five: Be nice to everyone. We all need friends and someday one of them may do something nice for you. Here's an example. During a capital campaign for renovations for a Girl Scouts camp, we highlighted plans and progress in our newsletter. One day a letter arrived. The writer explained that one of those newsletter articles had rekindled memories of her days as a Girl Scout camp director. She wrote that she was thinking of making a donation. I looked up her number in the phone book and called. We had a nice conversation. She was "thinking

about maybe \$3,500 or so," but wanted more information and added, "I never make a gift until I've done my taxes. Call me back after tax time." Material was sent and our phone date noted on the calendar.

When I called in late April she thanked me for the additional material. After the pleasantries she announced, "I know I said I was thinking about a \$3,500 gift, but I've changed my mind." I stopped breathing. She continued, "I've done my taxes and found some stock that I no longer need. I'm having my broker transfer it to the Girl Scouts. You should be getting about \$48,000."

Lesson Six: Silver linings may tarnish — be ready to use some elbow grease to recover the shine. During the summer our new donor had spent as camp director, the only staff building on the property was occupied — at her staffs' insistence — by the caretaker and his wife and new baby. The architect's sketches for renovating our camp's aging staff building had attracted her. The cost estimates showed that her gift would provide underwriting worthy of a naming opportunity. It sounded too easy. Turns out that it was. Subsequent design changes and delays nearly doubled the cost and delayed construction. While this spiral continued, the donor expressed a desire to visit the camp — and bring her friends along.

Lesson Seven: Keep the donor posted on changes in cost and schedule. Offering visits and meeting with the people actively involved — donors, staff, and consultants — helps keep a donor active in a positive way. This donor's pride and personal interest in this project led her to suggest the possibility of additional gifts. Her advocacy with friends was a bonus. Nonetheless, the building-to-be, now committed to be named in her honor, languished for lack of funds to complete it. Then — the luck of the Girl Scouts — an unexpected, unrestricted bequest in just the right amount dropped from the sky.

Lesson Eight: Always listen carefully for subtle messages — except when there are none.

Speaking of unrestricted bequests, another came with a twist when a notice of a pending estate arrived. The

deceased's name didn't show up in our donor records or ring a bell with any long-time employees. I called the attorney identified on the court document.

"Well, yes," he said, "the bequest is unrestricted, but my client preferred that the funds benefit girls in the county where she had spent her life." I told him of just such a need for a new pool at a camp in that very county. I imagined I could see the smile on his face as he told me, "My mother would have been very pleased. She was the President of the old Girl Scout Council board there."

Buoyed by the attorney's fond memories, I sought more information on his mother. Between his reminiscences and the memories of some old-timers, I began to piece together the story, which I freely shared with our board and other donors through our newsletter.

The woman was a kindergarten teacher for nearly half a century. She loved children and was impressed by the Girl Scouts program. Her husband, a local bus company employee, made it a habit to invest part of each paycheck, building a modest fortune. This was the stuff of legends. Unfortunately, the story turned out to be more mythical.

Confirming last-minute details with the attorney about the growing bequest (now up to \$186,000 and climbing) the truth came out. "I'm sorry," he said, "I must not have been as clear as I should have been. My mother was associated with the Girl Scouts. I don't believe that my deceased client ever was, although she was a very good friend of mother's." Oops! It seems that my wishful thinking had led me to weave a coat out of whole cloth.

Now whenever we receive notice of a pending bequest and I tell my boss that we don't know what the connection to the Girl Scouts is, she says, "I'm sure you'll come up with something." I think she's kidding. And I think that may just be *Lesson Nine...* **GF**

JACK SOARES HAS BEEN WITH THE GIRL SCOUTS OF THE SAN FRANCISCO BAY AREA SINCE 1986. HE CAN BE REACHED AT JACK@GIRLSCOUTSBAYAREA.ORG. ON THE WHOLE, HE THINKS FUNDRAISING SHOULD BE FUN. LET THAT BE A LESSON TO YOU...

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Fundraising Letters:

ADVICE FROM AN EXPERT

Reviewed by KRISTEN CASHMORE

How to Write Successful Fundraising Letters

By Mal Warwick / Jossey-Bass / 304 pages / \$27.95

Call him what you will — the master, godfather, or king of direct mail fundraising — Mal Warwick knows how to write successful fundraising letters. And for the reasonable price of \$27.95 you can learn all the tricks of the trade from the master. In this revised and updated version of *How To Write Successful Fundraising Letters*, Warwick focuses exclusively on what he calls “the effective use of written English in the pursuit of charitable gifts.” He does not discuss mailing lists, design, production, mail houses or scheduling. What he does do is concentrate exhaustively on the development of the entire mail package.

Sprinkled throughout this manual are tips on what works when using letters to solicit gifts, what doesn’t, and why. Warwick generously provides the reader with the insights he has gleaned from having read tens of thousands of fundraising appeals and writing or editing thousands of those letters himself.

While other manuals are short on examples and long on theory, Warwick provides the reader with a tool kit that enables any fundraiser to craft their own successful direct mail package. He includes images of more than a dozen sample letters, along with numerous outer envelopes, reply devices and reply envelopes. With these, he shows how to use direct mail to recruit new members or donors, welcome new donors, appeal for special (additional) gifts, request year-end contributions, solicit larger high-dollar gifts, upgrade donors, seek annual gifts, or thank donors.

As if that weren’t enough to justify the price of investing in this book, Warwick provides 64 outer envelope teasers, 54 strong leads for fundraising letters, 90 ways to use the word *you* in a fundraising letter, 63 ways to handle awkward copywriting transitions, 41 powerful ways to end a fundraising letter, 58 ways to start a P.S. in a fundraising letter, 15 ways how *not* to get results from your writing, as

well as a bibliography of 10 other books to help you write successful fundraising letters.

Though Warwick is short on theory, he doesn’t dismiss it entirely. In Chapter 2, “How a Fundraising Letter is Like a Personal Visit,” Warwick explains the Dialogue Method as developed by Siegfried Vögele, a German professor of direct marketing. Vögele’s theory explains the habits of direct mail recipients and this research informs the methodologies that Warwick promotes in his book.

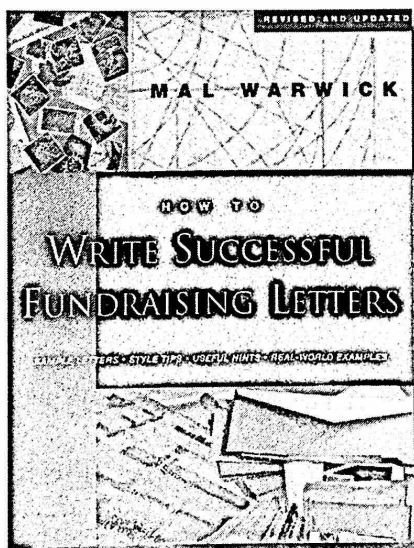
This manual is most useful for large, national membership-based organizations. As a fundraiser for an organization that is not membership based and has a small donor

pool, I yearned for a chapter called, “How to get donors to give for general support year in and year out when your program doesn’t change significantly from year to year.” While Warwick includes no such chapter in this book, he does provide enough instruction for me to tackle this challenge on my own.

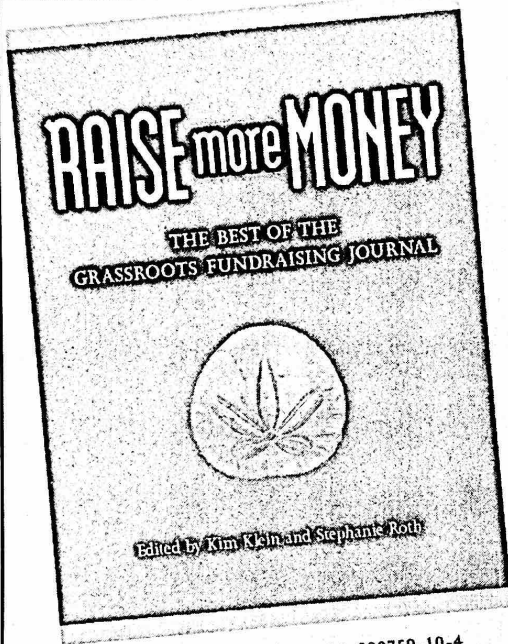
You could go to a dozen workshops and spend hundreds, if not thousands, of dollars to get the same information that you’ll find in this single volume. If you already own a previous version of this title, here’s a reason to purchase this edition: the book’s contents have been completely reorganized into a

more logical and smoothly flowing sequence. Warwick claims to have reconsidered every sentence, cutting a word here or there or adding some new insights; and he has added some fresh examples and some carefully selected new material. In addition, the font is very easy on the eyes.

Warwick packs most of his wisdom and experience from 21 years in the fundraising business into this book. The only thing he doesn’t provide are the names and addresses of donors who give regularly through direct mail packages. Maybe that will be in his next book.



KRISTEN CASHMORE IS A DEVELOPMENT ASSOCIATE FOR THE HESPERIAN FOUNDATION, A NONPROFIT BOOK DEVELOPMENT AND PUBLISHING ORGANIZATION IN THE BAY AREA.

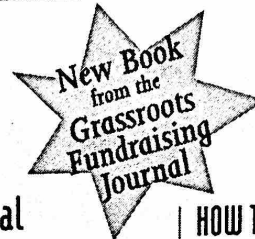


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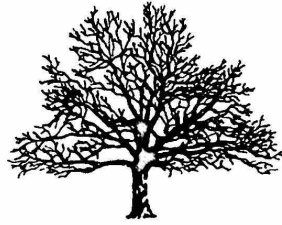
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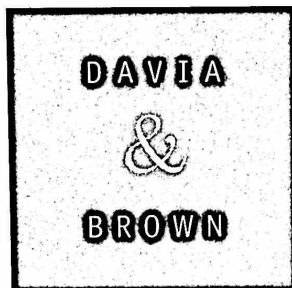


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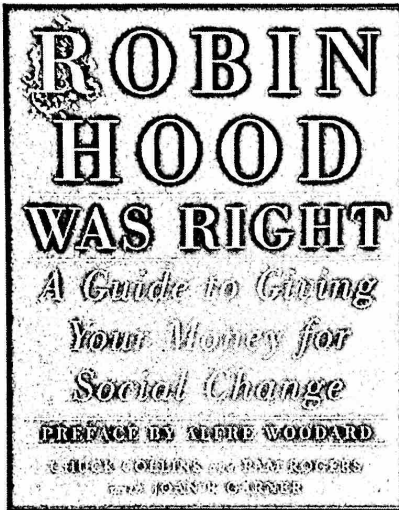
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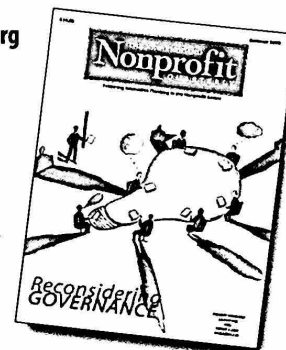


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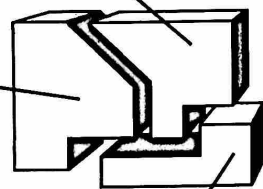
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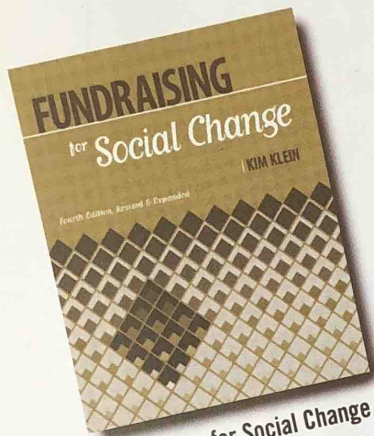
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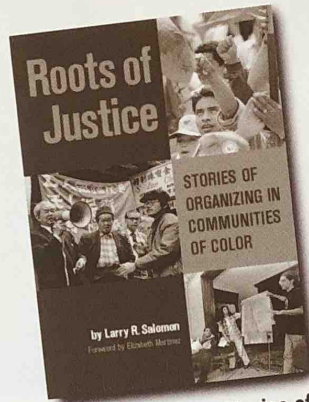
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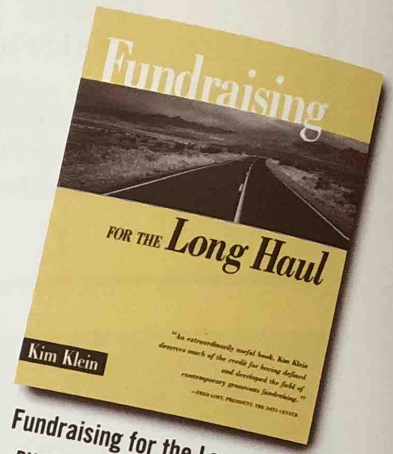
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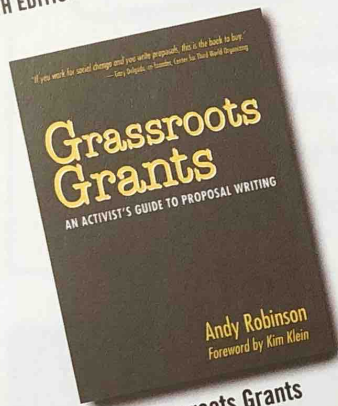
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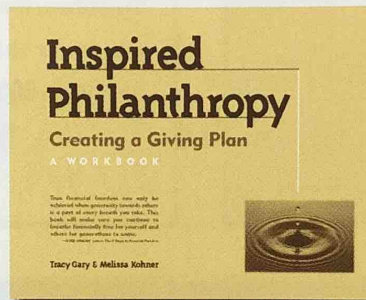
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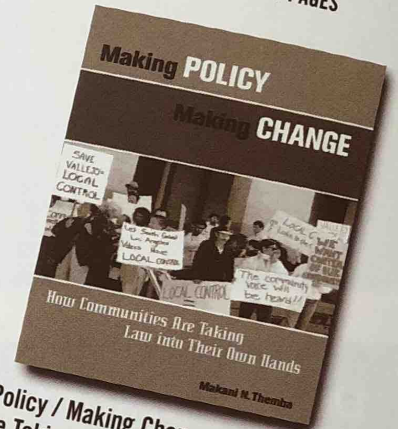
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