

HELPING YOU RAISE MORE MONEY — OUR 20TH YEAR!

# Grassroots Fundraising Journal

VOLUME 20 ■ NUMBER 6 ■ NOVEMBER/DECEMBER 2001

*Featuring:*  
**Quick Ways  
to Raise  
Money  
During the  
Holiday  
Season**

**KIM KLEIN**

*Also in this issue:*

**EVALUATING YOUR  
INDIVIDUAL DONOR  
PROGRAM**

**THE PUBLIC PHASE  
OF YOUR CAPITAL  
CAMPAIGN**



\$7.00 US

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**On Our Cover** THE CENTER FOR ANTI-VIOLENCE EDUCATION IN BROOKLYN, NY TEACHES VIOLENCE-PREVENTION, SELF-DEFENSE, AND SAFETY TO WOMEN, TEEN GIRLS, AND CHILDREN. IN THE CHILDREN'S EMPOWERMENT PROJECT CLASSES, YOUNG PEOPLE BUILD SELF-ESTEEM, DISCIPLINE, AND RESPECT FOR OTHERS AS THEY DEVELOP SKILLS IN A FUN, RESPECTFUL, NONCOMPETITIVE ENVIRONMENT. THE GIRLS SHOWN ARE LEARNING TO ENGAGE THEIR VOICES.

September 25, 2001

### *To Our Readers:*

We cannot put this issue to bed without acknowledging the tragic events of September 11th. We know that some of our readers have suffered the loss of family and friends and we extend our deep sympathy to you. We also realize that by the time this issue reaches you, the situation in the world may have changed even more dramatically, with an impact on our lives we cannot predict at this moment.

Many people are wondering about the effect on fundraising of the current crisis. Of course, none of us know because nothing of this scale has ever happened in the United States before. However, we'd like to respond to the many inquiries we've received about how to proceed with your fundraising activities. We recommend that you go to the Association of Fundraising Professionals' web site at [www.afp.net](http://www.afp.net) and read their statement, "Fundraisers: Stay the Course, But With Sensitivity." Also visit the American Association of Fundraising Counsel at [www.aafr.org](http://www.aafr.org) for their historical analysis of the impact on giving after other world events. In addition to the advice on these sites, we add this:

*If your work was important before September 11, it is still important now.*

Don't give in to the feeling that your work is "not as important" as the events and the aftermath of September 11th. To do that buys into a notion of a hierarchy in which there is a spectrum of work from "most important" all the way to "unimportant." Instead, consider the metaphor of an ecosystem in which everything is connected.

Finally, we must, as individuals and as a world community, figure out a different paradigm than attack-retaliate-attack-retaliate. Now is the time to follow the advice of the Biblical prophet Isaiah, "Cease to do evil. Learn to do good. Search for justice," so that we will find the reward promised by that same prophet, "They shall beat their swords into plowshares and their spears into pruning hooks. Nation shall not lift up sword against nation. Neither shall they learn war anymore."

*Kim Klein & Stephanie Roth*

# 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.

#### PUBLISHERS

Kim Klein and Stephanie Roth

#### EDITOR IN CHIEF

Nancy Adess

#### GRAPHIC DESIGN & PRODUCTION

Cici Kinsman/C<sup>2</sup> Graphics

#### ILLUSTRATION

Lisa Krieshok

#### COVER PHOTO

Kristen Mullins

#### 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).

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#### GRASSROOTS FUNDRAISING JOURNAL

3781 Broadway • Oakland, CA 94611

PHONE: (888) 458-8588 (TOLL-FREE)

(510) 596-8160 (SF BAY AREA)

FAX: (510) 596-8822

E-MAIL: [chardon@chardonpress.com](mailto:chardon@chardonpress.com)

[www.chardonpress.com](http://www.chardonpress.com)



Chardon Press — Oakland, CA

© 2001 Chardon Press ISSN No. 0740-4832

## LETTER FROM THE PUBLISHER *20th Anniversary Brings Exciting Changes*



KIM KLEIN

As you can see from the banner on the front cover, 2001 has marked our 20th year of continuous publication of the *Grassroots Fundraising Journal*. In addition to the bimonthly *Journal*, we have compiled three editions of reprints (*Getting Major Gifts*, *Board of Directors*, and our Spanish-language reprint, *Cómo Recaudar Fondos En Su Comunidad*). To celebrate our 20th anniversary, we collected the best of the *Journal* into a book called *Raise More Money*, issued earlier this year.

The *Journal* has been one part of our overall publishing operation, Chardon Press (named after a cat I found at a winery and named Chardonny, who lived out her long and full life with our editor). Since 1988, Chardon Press has published a number of books on fundraising, community organizing, and other issues related to social change. Financially, Chardon Press is marginally successful. It's more successful than Amazon.com, which has yet to show a profit, but over the years its owners have subsidized it with consulting income.

This year, to increase the income from the *Journal*, we added four advertising pages and began an individual supporter program. The income from these moves has allowed us to keep the subscription price of the *Journal* affordable at \$32. We are very grateful to all the ways readers have supported the *Journal* over the years — with suggestions for articles, by passing the *Journal* along to colleagues, by writing articles, and now, by donating.

While the *Journal* has a growing audience, we have struggled to increase the reach of Chardon Press books and expand the number of titles we publish. Earlier this year, Jossey-Bass, the well-known publisher of materials for nonprofits, offered to take over development and distribution of Chardon Press books in exchange for exclusive rights to publish and sell them. We have agreed. Under the name of the "Chardon Press Series," we will now be able to publish more books and distribute our current titles far more widely with Jossey-Bass's excellent editorial and marketing capacity. Co-publisher Stephanie Roth and I will work with Jossey-Bass to develop four books each year about fundraising, organizational development, and community organizing for grassroots and social justice organizations. In addition, our staff will be freed up to focus much more attention on the *Grassroots Fundraising Journal*.

For those many *Journal* readers who are also interested in Chardon Press books, there will be virtually no change, except more books to buy in the future! You can still find Chardon Press books on our Web site ([www.chardonpress.com](http://www.chardonpress.com)), and you will be able to order them via a link to Jossey-Bass. Be sure to see the announcement on the back page of this issue listing all our books now available.

By the way, the Web site also carries many past articles from the *Journal* as well as a way to order back issues of the *Journal* and the reprint series.

As always, we welcome suggestions for articles, and now we also welcome suggestions for books.

# QUICK WAYS TO *raise money* DURING THE HOLIDAY SEASON

BY KIM KLEIN



**T**here is a popular myth in fundraising circles that December is a great time to raise money and that people give away more, if not most, of the money they are going to donate in a year during this last month. Grass-roots groups will meet in October or November to discuss how to “take advantage” of the winter holidays, often emerging frustrated because they haven’t come up with anything brilliant.

Like most myths, the myth of December giving has some elements of truth:

- December is a great month to raise money. In this way, it is strikingly similar to the other eleven months of the year.
- Some people do give away most of the money they will donate in a year in December. Sometimes these are very wealthy people who are waiting to see how the stock market has done and which stocks they should donate to get the best tax advantage. Self-employed people with incomes that vary widely from month to month may also wait until year’s end to get a clear sense of their financial picture.

However, there are also some serious fallacies to the myth of December as the best fundraising month. To counter these fallacies, here are some facts:

- December is actually a very competitive month to raise money, particularly among social service agencies, as the needs of the poor, homeless, and hungry tend to be highlighted at this time of year. December fundraising also competes with the consumer gift-buying frenzy, as many religious and cultural holidays fall during this month.
- For every person who waits until the holidays to make their major giving decisions, including wealthy people, many more have already given away all that

they are going to give. In fact, very few people of any income bracket or level of giving make all their charitable gifts in any one time period. Many people give away money as they are asked for it and as they have it. People who are thoughtful and systematic about giving deliberately spread their donations over the whole year in order to be able to give away the amount they want without developing a cash-flow problem.

- In terms of the amount of fundraising work that can be accomplished, December is a short month. Little actual work gets done between December 15 and New Year’s, not only by nonprofits but also by our vendors, such as printers, computer technicians, repair people, and so on. Many people take some days or weeks off during December; for those still working, there are holiday parties to attend and last minute gift-shopping over long lunch hours. It is also hard to mobilize volunteers during this time. For all these reasons, any fundraising plans for December generally need to be carried out in the first two weeks of the month.

If your organization wants to take advantage of the holidays by selling cards, calendars, or running a year-end major gifts campaign, you should have been planning for these activities since September or even earlier. The following suggestions are for groups that either did not get around to such planning, didn’t know what to plan, or would like to augment their plans for the six weeks or so at the end of the year.

## SIX WAYS TO RAISE MONEY DURING THE HOLIDAY SEASON

Here are six fundraising ideas that can be carried out during the holiday season, which actually begins just after Thanksgiving.

## 1. Offer Contributions as Holiday Gifts

At the end of November, send a letter to all of your current donors suggesting a contribution to your organization as a holiday gift to a friend. Indicate that you will send the gift recipient a nice card in time for the holidays that will identify who gave the gift and describe the important work of your group and whatever benefits the gift brings, such as a newsletter. The letter to your donors might read as follows:

Dear Friend,

It's December again, and if you're like me, you are wishing you had started your holiday shopping earlier. Buying presents for friends at this time of year can be fun, but if you're short on time or ideas, it can be nerve-racking. Some friends are particularly hard to give gifts to because they don't seem to need or want anything. Should I get them another CD? Another book? Another piece of pottery?

This year I have decided to give many people on my holiday list a glimpse into Good Organization. I serve on the board and donate money and time to this group because I am convinced that the work we are doing is making a difference. I know my friends want to make a difference also, so I am giving Good Organization a gift in their name.

Do you want to join me? Simply send us a donation in the name of a friend, family member, or co-worker. We will send them a lovely card telling them about your gift. We will also send them our quarterly newsletter. Next year, we will ask them if they want to renew their involvement by making their own gift. They will receive no other solicitations from us unless they then make their own gift to our group.

You can give any amount. I have given what I would have spent on a present for each of these friends. You can give as many or as few gifts as you wish.

A donation to Good Organization in the name of a friend is perfect for:

- someone who wants to make the world a better place
- someone who "has everything"
- someone who has shown interest in our newsletter or borrows your copy.

In a month focussed on both giving and buying, isn't it nice to be able to give a gift that really makes a difference? To do so, just fill out the enclosed form and return it by December 15.

Best wishes for the holiday season,  
Teresa Juarez, Board Chair

The form for the donor looks like the following:

I would like to give the following people a gift in the form of a contribution:

1. Name \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Please circle which holiday is being celebrated: Chanukah Christmas Kwanzaa Winter Solstice Other \_\_\_\_\_

*If you don't specify, we will use the generic "Holiday Season."*

2. Name \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Please circle which holiday is being celebrated: Chanukah Christmas Kwanzaa Winter Solstice Other \_\_\_\_\_

*If you don't specify, we will use the generic "Holiday Season."*

3. Name \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Please circle which holiday is being celebrated: Chanukah Christmas Kwanzaa Winter Solstice Other \_\_\_\_\_

*If you don't specify, we will use the generic "Holiday Season."*

Total enclosed \$ \_\_\_\_\_ (Your gift is tax deductible.)

Make check payable to:

The card or letter to the recipient of the gift might read as follows:

Dear Mr. Huang,

Irene Chao has made a donation in your name to Good Organization as her holiday season gift to you. Irene may have spoken to you about our group, but let me tell you a little more.

We believe (Mission statement here). Our current goals are (three short sentences).

In 2002, we will intensify our work on XYZ issue with the addition of a drop-in center/public policy analyst/letter writing campaign. You will begin receiving our newsletter early next year, which will keep you up to date on our work. Please feel free to call or drop by our office. For a weekly update as well as more in-depth analysis, please visit our Web site at [www.goodfight.org](http://www.goodfight.org).

On behalf of Irene, and all of us at Good Organization, we wish you happy holidays and a healthy and peaceful New Year.

About 5% of your donors will take advantage of this offer; some of them may donate a good deal of money. Some groups have had donors give 20 or more gifts and donate up to \$1,000. Many people will give one or two gifts and donate \$50. Further, long after December, people will call to see if they can use the form for birthdays, weddings, memorials or anniversaries.

Make sure the names of the gift receivers are entered into your database and that they are solicited for renewal next year. Make sure they receive the newsletter during this first year, but do not receive your group's regular solicitations until their renewal.

## 2. Hold an Open House

An open house during the holiday season can be a nice benefit for all donors or just for long time donors or major donors. If you do invite all your donors, also invite funders, press, volunteers, and anyone else who has helped you during the year. Make a simple and inexpensive flier for an invitation that people can hang on their refrigerator or office bulletin board. Hold the open house on a week-night from 5:30–8:00 so people can come right from work.

Be sure that volunteers from your board or staff are assigned to circulate during the open house and talk with people. No one should come to this event and stand alone. There should be someone to welcome everyone at the door, a volunteer stationed at the food table to strike up conversations, and "roving greeters" who go up to people and introduce themselves. These volunteers should meet as many people as they can and learn their names.

Have volunteers carry a small notebook or index cards

in their pockets. If someone expresses an interest in something related to the group, the volunteer should make a note of their name and address and offer to send them more information or to invite them to the next meeting, or whatever action would be appropriate.

If you have T-shirts, books, calendars or other products that you normally sell, you can display them for sale as holiday gifts. Have wrapping paper and ribbon available so that people can get their purchases wrapped on the spot.

It is not necessary to have a formal program during the open house, but you may wish to do so. If so, make sure it is not more than 20 minutes long. During the program, take the opportunity to thank donors, to introduce new staff and board members, and to discuss exciting plans for next year. Tell people how they can get involved, if appropriate.

After the open house, everyone who greeted people should get together and make a list of all the people they met and any interesting or useful things they learned from those who attended. If anyone was promised something, it should be sent right away.

The purpose of an open house is not to raise money, but to thank people and build community among your supporters. It also provides good practice for board members to talk to donors without having to ask them for money.

You may also get some interesting offers from the people who attend your open house. One organization has offices with lots of windows. This is nice except that at certain times of sunny days, the sun shines in fiercely. People had hung sheets and pieces of cardboard to keep the sun off their computer screens. A guest at the group's open house, seeing this, bought custom-fitting window shades that can be opened from the bottom or the top for all the windows and thus be adjusted to ward off the sun without dimming all the light.

Another organization was told by a guest that she loved the content of their newsletter but was distracted and bothered by the large number of typographical errors she always found in it. A professional proofreader, she offered to proofread the newsletter before it went to the printer if they would e-mail it to her. Previously, anyone who was in the office was pressed into service as a proofreader. Since most people are not good proofreaders, this was not a secure way to find typos. (Even with computer spellcheckers, words that sound alike but have different meanings are missed. Likewise, last-minute changes often go to print without being run through a spellchecker.) Since this woman took over proofreading, some readers have called or e-mailed to voice appreciation for the greater ease of reading correct copy, showing that people had noticed although they had not complained.

### 3. Send Holiday Cards

The chair of the board or the executive director should send holiday cards to board members, volunteers, staff, and anyone who has been closely involved and helpful to your work this year. The cards should thank them for what they have done — a foundation program officer who went out of her way to help strengthen your proposal, a computer technician who didn't charge for repairing your printer when you jammed it by using cheap labels, the people at the Senior Center who get your newsletter ready for bulk mailing, and so on. Handwrite these cards. Your thank you does not have to be long. Two scribbled sentences that are personal are vastly preferable to a flowery computer-generated letter.

### 4. Check for Renewals and Pledges

Scroll through your database and make sure all your major donors (people giving \$250 and up) have been asked to renew their gift sometime during the past 11 months. If anyone hasn't been contacted, figure out why and figure out who can contact them by the 15th of December. Particularly be sure to contact anyone who pledged a gift and hasn't paid it. Our instinct is to think that people don't want to pay their pledge or will feel offended if we remind them, but the contrary is true. You will look like you value their commitment and need their money, and they may well have forgotten or lost the return envelope.

### 5. Get a Start on the New Year

Get a mail appeal ready to go out in January. January is a very good month for direct mail and the earlier your mail lands, the better your response will be. Having a mailing ready to go by the first week of January, or even sending it the last week of December, gives you a head start on the new year.

### 6. Out with the Old

Clean up your office, clean out your desk, get caught up on filing, data entry, and prospect research. Start the

new year with only the paper and computer files that you need and use.

## A FINAL SUGGESTION

These six suggestions will help you with fundraising during the holiday season. My final suggestion will help you stay in fundraising for the long haul: Take some time off. Do some things you like to do — read a mystery novel, go to the planetarium, see an old movie. Spend time with family, friends, and pets. Forget about work for a few days. Come back after New Year's rested, refreshed, and ready to raise money in January.

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

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# Evaluating Your *INDIVIDUAL DONOR* Program

BY STEPHANIE ROTH

The following three stories illustrate the importance of evaluation as a tool in developing a healthy fundraising program for your organization.

*Group X has been raising money from individual donors for several years.* At the end of every year they send a fundraising appeal to their mailing list of approximately 2,000 names. For the past three years, they have received 250 to 300 donations from that mailing. They don't know if the same people give each year; they also don't know if the rest of the people on their list (as many as 1,700 each year) are even interested in continuing to hear from them. They maintain their list in a database program that is not designed to track information most useful for fundraising purposes, and they have not developed an easy way to document the giving history of their donors.

Because they'd like to expand their donor program and increase the amount they raise from current donors, they realize that they need better systems of tracking their contributions and a way to analyze patterns of giving over time.

*Group Y has spent the past five years systematically building an individual donor base.* They ask their donors for money three or four times a year, including a year-end appeal, two special appeals, and an invitation to their annual dinner. They make an effort once a year to meet with each major donor (defined as those giving at least \$1,000 a year).

When Group Y recently faced a budget crisis brought on by cuts in their foundation funding, they decided to increase their efforts to expand their major donor program. For the first time, they completed an analysis of the trends in numbers and sizes of gifts they were receiving.

To their surprise, they discovered that their donor base did not look like the donor pyramid they had heard about (see illustration).

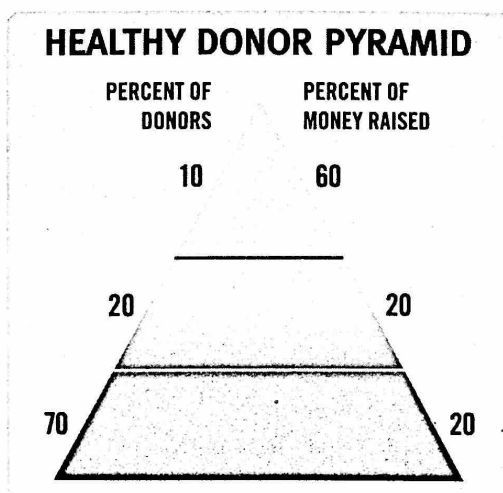
Instead, their pyramid was more like an hourglass — they had lots of people giving less than \$100, several people giving \$1,000 or more, but only a handful of donors giving between \$100 and \$1,000.

By evaluating their donor giving patterns in this way, they were able to identify the middle range of donors (those giving \$100–\$1,000) as the group most neglected in their fundraising activities, and thus the group with the most potential for expansion.

*Daniel, the new development director of Group Z, was frustrated by the lack of board involvement in the organization's major donor program.* Half of the board members refused to do any face-to-face asks and most of the major donor solicitations were carried out by the executive director, with only a few made by board and other staff members. Bringing his concerns to the attention of the executive director, Daniel asked for advice. The executive director suggested he review the history of the organization's efforts to build a major donor program.

To his surprise, Daniel found that the group had actually made great strides in recent years. Five years earlier, the only major gifts the group received came by chance in response to their annual mail appeal. No one ever met with any donors and the board did not participate in fundraising — nor were they expected to. After attending a fundraising workshop, the executive director realized they had great potential to develop their individual donor program and initiated their first-ever major donor campaign.

In the first year, the board argued against participating, with all but one member reporting that they didn't know any wealthy people to ask for a large gift. So the executive director, along with the one willing board member, took





the first hesitant step to initiate meetings with individual donors. The second year, the executive director brought a consultant in to conduct a fundraising training for the board. As a result, a couple of members agreed to do some fundraising work.

Now, five years later, half of the board (a total of seven people) were doing some individual donor fundraising, and they were close to their goal of raising 10% of the organization's budget.

## THE VALUE OF EVALUATION

These three examples point to the value of evaluation in determining whether or not your fundraising program is doing what you want and need it to. Evaluation tells you how close you came to accomplishing your goals and gives you guidelines for developing your next fundraising plan.

Group X had neither fundraising goals nor a way to find out how well their donor program was working. Group Y learned where their greatest opportunity for growth lay. (In fact, many groups find a gap in their individual giving program in the \$500 to \$1,500 range, as this is often the most neglected group of donors.) By discovering how far the board had come over the past five years, the development director of Group Z was able to appreciate the progress they had made and rethink how to work more effectively with board members.

Evaluation involves both quantitative and qualitative measurements. The quantitative measures include such things as the response rate from a direct mail appeal, how much money you raised from a special event, how many donors increased their gifts, and how many did not renew. Qualitative measures include how donors feel about your organization and whether board members understand their fundraising responsibilities.

## DEFINING SUCCESS

In order to plan from one year to the next, you need to know how well you did in the year that just ended. First you must define all the elements of success for each fundraising strategy. You may have a financial goal of raising 20% of your budget from individual donors. But whether you meet this goal is only one indicator of success. The other goals whose outcomes you want to measure include the number of new donors you want to acquire, the kind of involvement of board and volunteers you're striving for, whether and how fundraising has become more integrated with the program work of your organization, and the "shape" of your donor pyramid.

Thorough evaluation of your fundraising activities will help you answer the following questions about your fundraising program:

- What is the best way to use limited resources of money and time to increase the money we're raising from one year to the next?
- Is our fundraising program being carried out to maximize the involvement of the broadest range of people (staff, board, and volunteers) and integrate it with the rest of our organization's work?
- What are the specific goals of each fundraising strategy we're implementing and are we meeting them?

## WHAT TO EVALUATE

The answers to the following detailed questions will provide the foundation of your evaluation. From these, you will be able to determine if you've met the broader goals implied in the questions above.

### A. Questions about donors & money raised

1. How many new donors did your organization acquire in the past year? How many had you planned to acquire? What specific strategies did you use to get those new donors?

2. Of the donors who gave in the previous year, what percent renewed their gift? (This will give your retention rate.) What did you do to keep your current donors? How many solicitations did most donors receive in the course of the year?

3. What did you do to move donors into higher dollar amounts so that they made a commitment that was at a significant giving level for them? How many donors were solicited for a major gift?

4. What is the total amount you raised from individual donors this year?

5. How many donors do you now have at the following levels of giving?

Less than \$50	_____
\$50-\$99	_____
\$100-\$249	_____
\$250-\$499	_____
\$500-\$999	_____
\$1,000-\$2,500	_____
More than \$2,500	_____

6. In what ways did you keep in touch with your donors over the past year? (This could include sending them newsletters or updates, inviting them to participate in non-fundraising activities, inviting them to be part of a fundraising team.)

### B. Questions about board & staff roles in fundraising and record-keeping

7. Has the number of board members involved in fundraising increased? How many board members were

involved in at least one fundraising activity? What specific activities did they participate in? What opportunities did you provide to increase the fundraising skills of board members?

8. How did you recruit and use volunteers? What did you do to support and encourage their involvement in fundraising?

9. What did you do to get staff members to integrate fundraising into their program or administrative work? What opportunities did you provide to increase the fundraising skills of staff members? How did you assure the best use of the fundraising staff's time?

10. Did all board, staff, and leaders make a gift to your

### Evaluation Chart

STRATEGY	NUMBER OF PROSPECTS ASKED	RESPONSE: PERCENT AND NUMBER	AMOUNT RAISED (GROSS AND NET)	WHO PARTICIPATED AND HOW MANY (STAFF, VOLUNTEERS, BOARD)	WHAT WORKED AND WHAT DIDN'T (DID WE ACCOMPLISH OUR GOALS?)
Direct Mail to New Prospects (Acquisition)	Two mailings; total of 5,000 letters sent	1.2%, 60 new donors	Gross: \$2,100 (average gift: \$35) Expenses: \$3,000 Net: -\$900	Development Associate, with assistance from Executive Director	Rate of response was within the range we expected (1-2%), although we hoped to get closer to 2%. Planned this strategy as an investment to bring in new donors, so didn't expect to have a net profit at this point.
Mail Appeals to Current Donors	500 donors (giving less than \$250), each asked twice during year	55% on renewal letter; 15% on special appeal	Gross: \$18,000 Expenses: \$750 Net: \$17,250	2 staff & 5 board members helped with mailing	First time that board members added personal notes to some of the letters. Hope they will get more comfortable doing phone calls and donor visits in the next campaign.
Phone Solicitations to Current Donors & Qualified New Prospects (to ask for gifts between \$100 and \$250)	100 donors who give between \$100 and \$250 were called as a follow-up to personalized letters	Reached 30, left messages with 50 others; a total of 40 sent in a contribution	Gross: \$7,200 Expenses: None beyond phoning costs and staff time	Ran it as a phone bank over several evenings; 3 staff, 2 board members & 2 volunteers participated	Because it's hard to reach people by phone, we always do this one over several nights. The first year we only reached 15% of our donors; by adding several nights, we've gradually increased the total number reached. Received more gifts at higher amounts than with just a letter.
Personal Asks for Major Gifts (\$250 & Up)	65 (40 were current donors, some at less than \$250; 25 were new prospects)	30 gave \$250 or more; 8 gave less than \$250	Gross: \$25,000 Expenses: \$500 (some meals, local travel & long distance calls) Net: \$24,500	ED and DD did most of the asks, 2 board members participated and one of them brought in a \$5,000 gift.	Still working on getting more board members and other volunteers to work on major donor campaign. Too many of the donors have a relationship only with the ED.
Special Events* Annual Dinner	750 invitations sent to current and recently lapsed donors, 100 to new prospects	200 people attended event, 40 sent in \$ but didn't attend	Gross: \$12,700 Expenses: \$7,200 Net: \$5,500 (Includes ad book income of \$2,500)	Dinner committee of 5 volunteers, 2 board members & 1 staff person	Hoped to get 250 people to the dinner and gross \$20,000. Two problems: bad weather that night affected turnout, and we didn't get as many high-dollar sponsorships as hoped.
House Parties 1) Judith 2) Panya & Suzy 3) Miguel	Number of Invitations Sent: 1) 38 2) 85 3) 60	Number attended: 1) 15 2) 25 3) 18	Net Income: 1) \$1,100 2) \$750 3) \$1,500	Who was host? 1) Board Member 2) Former Staff 3) Longtime donor	Had planned to have 5 house parties during the year, pulled off 3; successful in getting a donor to do one. Financial goal was \$1,500 per party. Panya and Suzy's party had largest turnout, but pitch was weak and contributions lower than expected. Need better prep with hosts in the future.

\*If more than one event, fill out per event

organization that is significant to them? What did you do to encourage giving from all the constituencies of your organization?

11. What kind of record-keeping system do you use for fundraising? (Ideally you would keep track of all contributions received, including who gave, how much, and the circumstances of their gift.) Is it easy to store and retrieve information? Are you able to produce reports that give you the information you need about your donors and the results of all your fundraising activities? Is adequate staff time allocated to keeping your database up to date?

12. What did you do to celebrate your fundraising successes and tackle your continuing challenges?

### C. Questions about specific strategies

13. For each fundraising strategy completed during the past year, answer the following questions (see sample chart on the preceding page).

- How much money did you raise (gross and net)?
- How many new donors did you acquire?
- How many total contributions did you receive?
- What was the range of gifts received?
- Who in the organization was involved in this activity (including staff, board, volunteers)?
- In what other ways did your organization benefit from this activity (for example, gained publicity for your organization, provided education on fundraising for members, provided an opportunity to get to know and involve donors more)?

## Cómo Recaudar Fondos en su Comunidad

Articles by Kim Klein, Stephanie Roth, María Gonzales, Dave Fleischer, and Lucy Grugett. Translated by Norma Del Rio



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## SAMPLE EVALUATION CHART

The chart at left shows an evaluation of the fundraising activities of an environmental organization in the Pacific Northwest. They currently raise about 25% of their annual budget from individuals; the rest comes from foundations. Their goal is to increase the proportion raised from individuals to 50% over the next five years.

This chart does not give all the detail you need in order to fully assess the effectiveness of a particular strategy or fundraising effort. For example, in the section on "Direct Mail to New Prospects," you would evaluate the results of each list you mailed to, as well as any changes you made in the package (envelope, letter, reply device, inserts) since your last mailing. On the major donor campaign, you would want to incorporate feedback from members of the solicitation committee and identify ways to get more people involved or give solicitors more support to be able to complete their asks. However, a chart like this is easy to do, and will give staff and board a bird's-eye view of the kind of information you need to generate in order to evaluate your fundraising program.

## WHEN TO EVALUATE

You should evaluate your fundraising program annually as a way to inform your fundraising planning process for the coming year. However, rather than wait until the end of your fiscal year to start looking at the outcomes of your various fundraising activities, take the time after each activity is completed to evaluate it. In the case of an activity that involved a team of people, such as a major donor campaign or a special event, bring the team together to celebrate the success of the activity, discuss the results, and identify areas to improve upon for the next year.

Be sure to keep written records of all your evaluations. They will not only be helpful in creating next year's fundraising plan, they will also be useful for tracking your fundraising progress over several years.

## USING THE RESULTS OF YOUR EVALUATION TO PLAN

The results of your evaluation should inform the planning for your next set of fundraising activities. If you have done a thorough job of evaluating your past year's activities, when you are putting together a fundraising plan for the next year you will have a much clearer idea of how much money you can realistically raise, how much it will cost you, and how many donors will respond to a given strategy and at what levels of giving.

STEPHANIE ROTH IS CO-PUBLISHER OF THE *GRASSROOTS FUNDRAISING JOURNAL*.

# The Public Phase of Your Capital Campaign

BY KIM KLEIN

“I think we are ready to go public with our capital campaign!”

“Let’s launch!”

For many of us in the fundraising business, these phrases are uttered with a feeling that combines joy, relief, and a new kind of anxiety. Joy and relief because our work has paid off. Board members, staff, and volunteers have joined together and worked out a plan for what we need — a building, a renovation, land acquisition. We’ve agreed on the goal and the timeline for raising the money. We have created a gift range chart and found five to ten donors to give the first 40–50% of the goal. We have identified enough donors to feel confident that we can raise the next 30–40% fairly easily and we feel confident that we have enough community support to fill in the final 10–30% of the funds we need.

This part of the campaign has not always been easy and has taken more time than we thought. There may have been surprising disagreements, unexpected staff or board turnover, a couple of donors that didn’t give or pledge as much as we had expected. There have probably also been some wonderful moments — a donor who gave much more than we could have imagined, the board member who volunteered to chair this part of the campaign really worked hard and did a good job. Now, we are ready to go public and we are joyous and relieved because so much has fallen into place.

But what is this new wave of anxiety? Well, up to now we were in the “quiet” phase. If things went haywire, not that many people would know. We had time to adjust the goal, add items we hadn’t thought of to the cost of the campaign, get feedback from some people and bring others into the planning process so that as many people as possible had input before final decisions were made.

Once we launch the campaign publicly, it will be much harder to increase or decrease the goal or to make changes in how we describe what we are raising money for. After this, it will also be impossible to abort the campaign.

As with most big undertakings, anxiety is part the campaign. The trick is not to give in to it and particularly not to add to other people’s anxiety.

With careful planning, the public phase of your capital campaign can go smoothly. Just like the “quiet” phase, it has distinct elements. Let’s go through them.

## THE LAUNCH

As a loyal friend and supporter, the staff and Board of the DataCenter warmly invite you to help us celebrate the

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Leibberg  
forward to  
Sean, you.  
Call the best.  
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- BUILDING THE DATACENTER AS A LASTING RESOURCE FOR THE SOCIAL JUSTICE MOVEMENT -

Learn about our plans Meet some new staff! See old friends and make new ones! Find out how we are building the Endowment

DATACENTER ENDOWMENT LAUNCH  
WEDNESDAY, SEPTEMBER 5, 2001  
6:00 - 9:00 PM  
GINN HOUSE, PRESERVATION PARK

I would like to attend the launch celebration. There are \_\_\_\_\_ people in my party.

I cannot attend but would like more information about the Endowment. Please contact me via \_\_\_\_\_

NAME \_\_\_\_\_  
DAYTIME PHONE \_\_\_\_\_  
ADDRESS \_\_\_\_\_  
CITY, STATE, ZIP \_\_\_\_\_  
EMAIL \_\_\_\_\_

- BUILDING THE DATACENTER AS A LASTING RESOURCE FOR THE SOCIAL JUSTICE MOVEMENT -

Most organizations choose to have some kind of party to announce their campaign. These parties are not required, but they are fun and they bring attention to the campaign. Although some choose to make the launch a fancy special event and use it to raise money, that is a lot of work. I recommend a simple party for the people who have worked on the campaign so far, the people who will be working on it in the future, the donors who have given so far, and some of the donors who will be asked shortly.

The purpose of such a party is to generate enthusiasm. The people who have already given will probably appreciate being thanked for their commitment and faith in the project; people who will shortly be asked may become caught up in the excitement. At the event, have some kind of thermometer or other symbol to show how far you are in the campaign and have the board chair, the

executive director, and possibly another donor give short speeches about how important this campaign is.

Have pictures of your building, your land, or your plans for renovation. Traditionally, someone sticks a shovel in the ground for the "ground breaking" or guests are given hard hats and shown around the new building if it has already been purchased or oriented to the renovation if it has begun.

The press can be invited, and certainly a press release ought to be issued. This can be a good opportunity to invite government officials such as the mayor.

The party is brief — two hours at most. Have champagne or sparkling cider and some nice hors d'oeuvres.

## MATERIALS NEEDED

The donors who give you money not only have to believe that the capital project you are undertaking is very important, they must also believe that your organization is capable of handling this large a project. You must convince them that you can manage a building, deal with contractors, handle large gifts, negotiate lines of credit, make architectural decisions, get building permits, and so on. For grassroots organizations undertaking capital campaigns, the capability of the group is often of greater concern to donors than the worthiness of the cause.

In one organization I consulted for, no one on the board or among the staff had ever owned property. When they decided to buy the building they were in, even though the goal was very reasonable, they found that some of their donors were balking at giving them money. We put two solutions into place. One was to invite two of the donors who had doubts about the ability of the staff and board to manage property to be on a "facilities committee" with two realtors. This team was able to handle a lot of the negotiations with the city and with vendors that would have taken a good deal of the executive director's time. The other solution was to bring in a local real estate broker to give a crash course in the language of real estate for the board and staff. Once the director and other board members were comfortable using words like "escrow," "depreciation," and "amortization schedule," donors

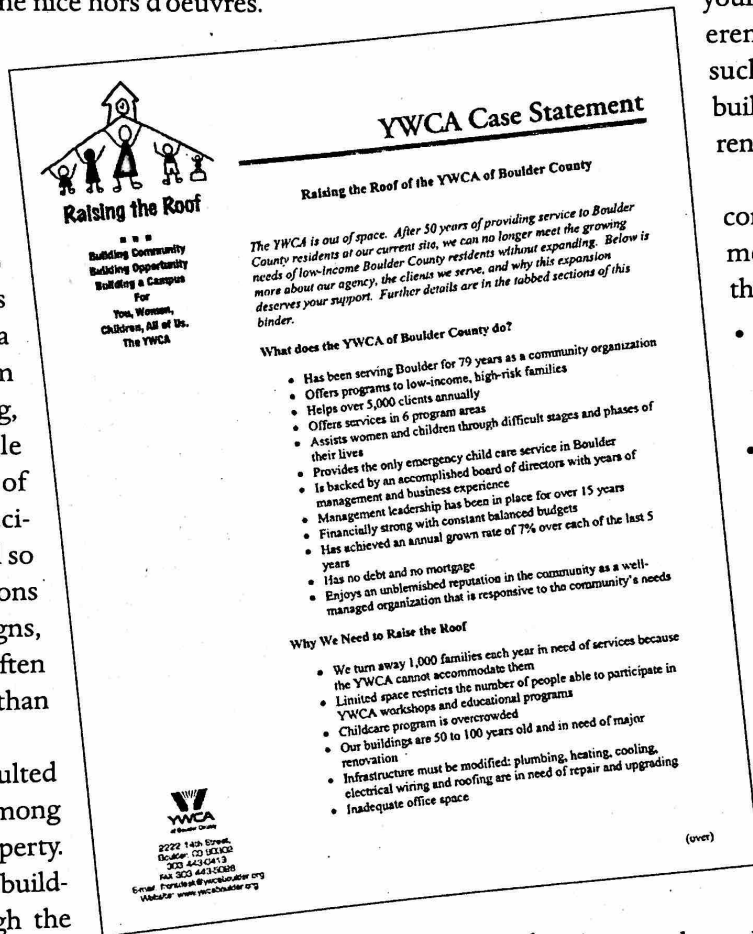
felt assured that this group could handle this property.

The main item you need in terms of written materials is a Case Statement. A good case statement can go a long way in providing potential donors with the assurance that the capital campaign is a good cause run by a capable group. The case statement will probably need to look fancier than many other materials you have created in the past. If you don't have the capacity on your staff to write and produce such a high-end piece, hire a writer or an editor to help you and a designer to give it a professional look.

Use a folder or a three-ring notebook for each copy of your case statement. The outside of the folder should have your logo and a visual reference to the campaign, such as a picture of the building or an architect's rendering.

A typical table of contents for a case statement would be something like this:

- Summary of the need for your capital campaign (example at left)
- Programs of your group and how they will be improved by this campaign
- Brief history of the organization and how it has come to need this capital improvement
- The goal, including the gift range chart, money raised so far, donations needed



- Pictures, drawings, and graphic illustrations of the campaign
- Financial statements of the group — budget, plans for raising money in the future
- List of board and staff, with brief bios of each
- List of capital campaign committee members and brief bios of each
- A description of ways a donor can give, including a pledge form, payment options, naming opportunities, and so on

The inside of the folder or notebook contains a series of separate pages that can be changed, updated, or

rearranged depending on the donor you are talking to.

For example, a historical society is buying a national landmark building to be their office and museum. They have several programs that will be housed at this building — the museum; a children's theater program where kids make up plays based on their own historical research; and a historical archive, including an on-line research program on a computer available to the public.

The society knows that some donors love the children's program and others are more drawn to the museum. Every donor sees the same case statement, but the pages can be arranged in slightly different order to emphasize one program over another. Three pages of photographs are available for each aspect of the program — the museum, the archive, and the theater program. Every case statement is assembled with one page of photographs for each program area, but extra pages of photographs are inserted for the aspect of a program that a prospective donor is known to be most attracted to. Tailoring each folder to each prospective donor in this way keeps costs down, as reproducing the photos is expensive.

In a way, the case statement is a fancier version of a proposal for a large grant. Ideally, the language is also more exciting, but the idea is that you have a written case that a donor can examine and that will answer most of their questions.

Some organizations will also print up a capital campaign brochure. This is a smaller version of the case statement, with just a few pictures and the basic story about the campaign's goals. It is used with smaller donors or given out at house parties and other events. However, because brochures are expensive to design and print, I usually recommend against them. They are a more fixed piece and inevitably some of the information in them will change, making them easily obsolete or inappropriate (key staff who are quoted may leave, graphics of an architect's rendering are out-of-date once building begins, and so forth).

## NAMING OPPORTUNITIES

If you are building a new facility or renovating an existing one, you may wish to offer "naming opportunities" to donors. Basically, for enough money, a donor can have a room named after themselves or someone else. If you decide to have naming opportunities, the board will have to have a policy about what kind of names you will allow. Does the person the room is named after have to be deceased? (If yes, this keeps you from having the embarrassment of a room named after someone who several years later is caught embezzling money or selling pornography on the Internet — both of which have happened.) Does the name have to be a real person's name

or could someone name a room after Mickey Mouse? Most boards simply reserve the right to reject a name and hope that most names suggested will be appropriate.

Generally the most public room carries the highest price, with meeting rooms, kitchens, and offices carrying successively lower prices. Hallways can have a price, as can entryways, sidewalks, doors, chairs, and desks. Generally bathrooms are not named; however, in the new Berkeley Repertory Theater even the bathrooms are named.

You can list the naming opportunities in your case statement, but often a naming opportunity is offered only in person to a donor: "We were wondering if you would like to honor your mother by having the sculpture garden named after her?"

You don't have to offer naming opportunities; many successful campaigns do not. Some campaigns have named rooms after famous people and asked people to "buy" a room. For example, the Sojourner Truth meeting room might cost \$100,000. For someone who loves Sojourner Truth, this is a great opportunity. The plaque on the wall will then say, "The Sojourner Truth Meeting Room (in big letters) made possible by Jane Smith and Sally Jones (in smaller type)."

Design your Case Statement so that each page can be printed or photocopied as needed. Photographs and other graphic design elements may need to be printed in larger quantities if they are not coming right from a computer, but you don't need to print up more than 50 of these at a time. Most campaigns have raised 90–95% of their money from 100–200 donors, so large quantities of materials are not important. Nonetheless, it is imperative to have well-written, nice-looking materials.

## APPROACHING THE REST OF THE DONORS

In the quiet phase of the campaign, you talked to ten to twenty prospects at most. Most of them said yes to the amount you requested or to a lesser amount. As you proceed in your campaign, more prospects will say no. This is normal — you are moving out from the inner circle of people who love what you do to a circle of people who like what you do but may have priorities other than your group.

As you move further out, you will encounter prospects who may not agree with your campaign, or who may not be willing to give because they don't like the executive director or don't agree with a certain program direction. For the second 30–40% of your goal, you will need to talk to fully twice as many prospects as the number of gifts you need

Often, when a campaign is half to two-thirds of the way to its goal, it may seem to stall. No one is saying yes, people are reluctant to meet with you, volunteers are

getting discouraged. The original excitement has worn off and the excitement of being in the home stretch has not yet kicked in.

The only thing you can do at this point is keep slogging away. You can try to add some excitement by asking a prospect for a challenge gift or even by soliciting the very last gift. "Will you give the last \$50,000 to our campaign? If we can't make it to that point, you will owe nothing." If a prospect says yes to this, you can then tell all your other prospects that you have the beginning and the end — all you need is the middle.

Once you have raised or received pledges for 80–85% or more of your goal, you are ready to roll out the final phase of the campaign. If you have a large donor base, you will want to approach them with a mail appeal that asks them to complete the work that has been started. The mail appeal solicits gifts of \$50, \$100, \$500. People are encouraged to think about spreading their giving over two or three years so as to make the largest gift possible.

If you don't have a large donor base, you may want to go into the community and ask people who have never given you money before. Many groups have been successful in converting to annual fund donors those making capital campaign gifts who were initially drawn to the group for the boldness of its capital campaign.

You may also want to go to corporations, small businesses and family foundations at this point (if you haven't already approached them) to help you reach the top. Your

pitch to them is that it is clear at this point that you are going to meet your goal and be successful — they are simply being asked to join the winning team.

## THE CELEBRATION

Many organizations that are within a few thousand dollars of their goal complete the campaign with a large special event. An awards dinner works well for this purpose, as you can not only thank people for what they have done for the campaign, but you can also call attention to your annual program needs and successes.

Even if you don't put on a big event, you should have some kind of celebratory party where you bring in the final dollars on your thermometer or other symbol and toast yourselves for your hard work.

As you can see, two-thirds of the campaign is over before the public phase. Creating the case, getting agreement on the goal, researching the first prospects, testing the feasibility, soliciting the lead donors, and preparing for the public phase of the campaign are huge pieces of work.

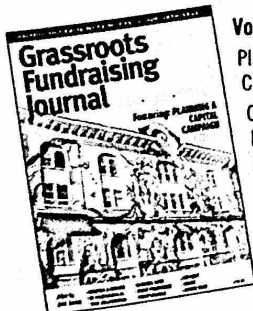
The final third, the public phase, is also a huge piece of work and it may last as long as the first two phases. In many ways, however, it is much more straightforward. If the groundwork has been laid properly, the final phase of the campaign will feel very manageable.

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

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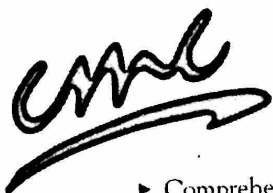


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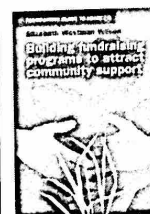
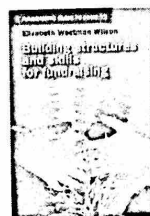
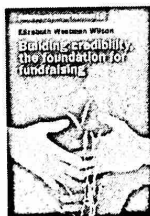
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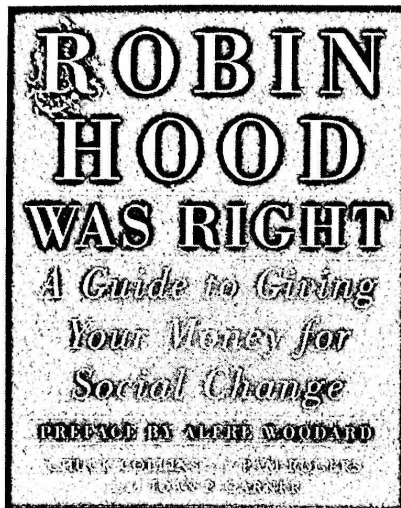
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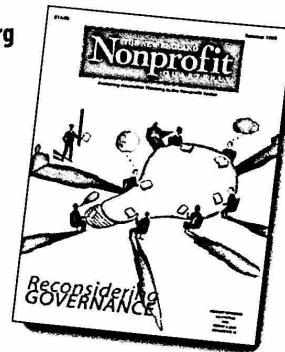
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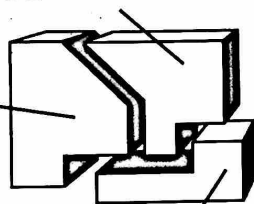


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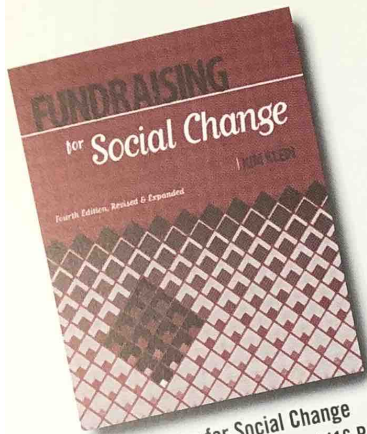
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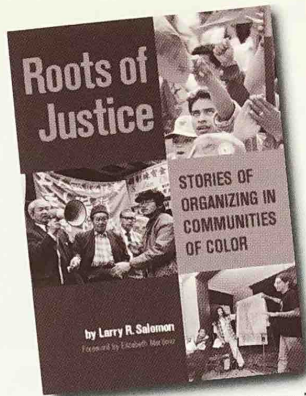
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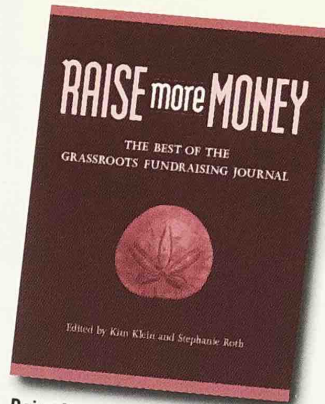
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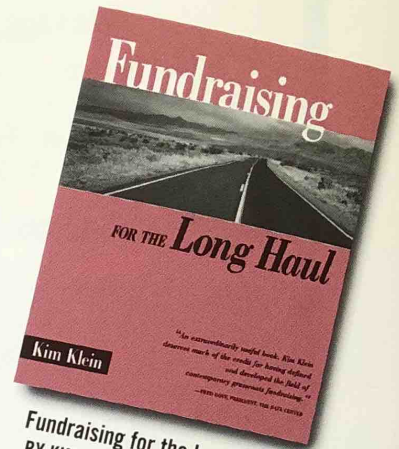
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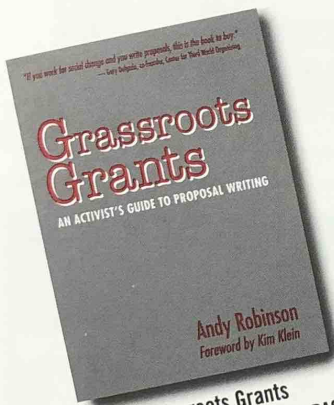
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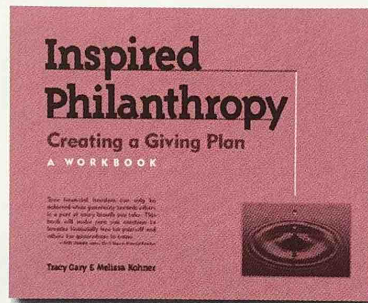
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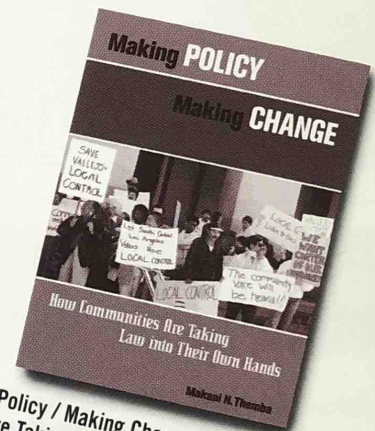
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