

Grassroots Fundraising Journal

VOLUME 21 • NUMBER 1 • JANUARY/FEBRUARY 2002

Featuring:
**Raising
Money in
Uncertain
Times**

BY KIM KLEIN

Also in this issue:

**BEYOND BRANDING:
DEFINING YOUR IMAGE**

**FUNDRAISING MEDICINE:
CREATING GIFT
ACCEPTANCE POLICIES**

**BEST PRACTICES
OF EFFECTIVE
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LETTER FROM THE PUBLISHER

KIM KLEIN

Welcome to 2002 — a year in which the numbers make a palindrome: the same forward and backward. This will not happen again until more than a hundred years from now, in 2112. When I was just learning to read, I saw a palindrome for the first time in the phrase, “Madam, I’m Adam.” I thought it was hilarious and walked around saying it to everyone. Many simply thought I didn’t know my own name. Men I approached probably thought I didn’t know anything about gender either. This story has nothing to do with fundraising, except that I hope you find many occasions to laugh this year and that this palindrome is a good omen for some real joy in spite of all that is happening in the world.

Here at the *Journal*, our subscriber list continues to expand; we know from subscriber surveys that our “pass-along” rate means we have about four times as many readers as our 4,000 subscribers. Our goal is to have 10,000 subscribers by 2005, with 40,000–50,000 people reading the *Journal* every issue. Our thanks to readers who recommend us to friends, share mailing lists with us, and share ideas about what we should write.

We continue to provide free subscriptions to organizations in developing countries, and we continue to post articles from the *Journal* on our Web site so that much of our information is free. We have been able to keep the *Journal* subscription price at \$32, thanks to all of you who contributed to our fundraising drive. It is not too late to make a donation! Remember that for a contribution of \$100 or more, you can give a free subscription to a friend or your favorite nonprofit.

We call your attention to our e-mail newsletter. Every month it gives fundraising news, my public workshop schedule, and answers to fundraising questions in the “Dear Kim” column. To subscribe, simply go to our Web site at www.grassrootsfundraising.org and sign up.

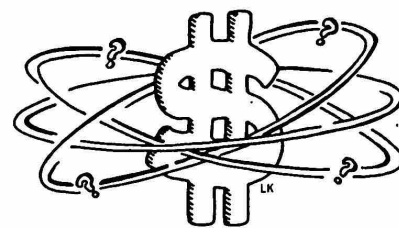
This month’s cover features a group that is raising money for important work in Israel and Palestine being done by Rabbis for Human Rights. I encourage you to take a break from fundraising and re-read the Universal Declaration of Human Rights (find it on the web at www.un.org/Overview/rights.html) and become your own mini-group: (Your Name Here) for Human Rights.

Let’s work hard, raise the money we need, and set a goal that by the next palindrome year people will read about a time in history when we fought for human rights and finally won.

P.S. Want a listing by topic of all the *Journal* articles in available back issues? Just e-mail, call or fax us and we’ll send you one.

RAISING MONEY

In Uncertain Times



BY KIM KLEIN

September 11 marked the beginning of a new era characterized by an awareness of how little control any of us really has. Of course, from the day we are born none of us really knows what is going to happen tomorrow or the next day. Will we catch a cold? Trip and break a bone? Hear that a loved one has died? Die ourselves? In many ways, the United States has now joined a great portion of the world community. Palestinians and Israelis, the people of Ireland, India, Spain, and many other countries live with the threat of terrorist acts. People in dozens of other countries live with civil war, often close by their towns and villages. Even in many neighborhoods in the United States, people live with the very real threat of drive-by shootings, gang warfare, and police brutality. Women always live with the threat of rape, and millions of women live in fear of domestic violence.

For our purposes, the events of September 11 raise two questions: What effect does all this have on fundraising? And, How shall we change our fundraising plans and strategies to cope with it? I will reflect on the overall picture and then suggest, strategy by strategy, things to take into account as you adjust your fundraising plans.

OVERALL

In these times, one would expect three important factors to affect the ability of small nonprofits to raise funds: the September 11 attacks, the subsequent "war on terrorism," and the state of the economy. Interestingly, none of these factors is likely to have a great or lasting effect on fundraising overall, although in the short term and for a cross section of groups, they may exact a high toll.

The economy has been sliding into a recession for more than a year. September 11 added a major blow to an already fragile economic picture. Fortunately, history shows us that giving by individuals is not generally affected by recessions. Although we have gone through several recessions in the last 40 years, in all but one of those years giving has gone up. Since most gifts are from middle-class, working-class, and poor people, the stock market has little effect on their incomes or their giving.

People with a lot of money in the stock market will cut

back on their giving, but those who held diversified portfolios will be able to continue giving by taking money from money markets or when their CDs roll over. Of course, people who are left unemployed because of the recession will have to cut back on their giving, but those who still have jobs often give more during hard times. Region by region, economic downturns may take a toll on giving by individuals, but overall there will be little change.

The American Association of Fundraising Counsel (AAFRC) has examined the impact that major events of terrorism or war and major political and economic crises since the fall of France in 1940 have had on giving. They note that the stock market has dropped immediately following most major crises, and within one year has recovered. Many experts believe we are moving into a global recession and so the market may stay depressed, but the AAFRC data simply indicate that the market will recover most of the value it had before September 1, not that it will come back to where it was in the late 1990s.

A question in the minds of many nonprofits today is whether the immediate outpouring of donations to relief efforts following the September 11 attacks will diminish the generosity of donors to other causes. Last fall the AAFRC reported, "A significant outpouring of support for relief efforts from donors making small gifts, perhaps \$25-\$100...will be relatively short term and have little impact on total giving or on distribution of giving (i.e. what proportion goes to education, health, the environment, and so on) this year." (You may read their full report at www.aafrc.org.)

While some organizations have noted significant drops in contributions since September 11, others have noted no drop at all. There is no pattern to these reports. For example, in the San Francisco Bay Area, two fairly similar organizations are having very different experiences: the Salvation Army reported a large drop in donations after September 11, whereas Goodwill Industries reported being right at their target goals for that time of year even one month after the attacks. Other organizations are doing better than anticipated. Alan Becker reports in the AFP Bulletin that the San Francisco Chapter of Physicians

for Social Responsibility had their annual dinner the night the bombing of Afghanistan started. Attendance was up by 20% from the previous year. The amount of money brought in by events for Strike Out for Breast Cancer and Amfar are projected to exceed last years' by significant margins. I have heard from a wide variety of organizations that, much to their relief, they have not seen a decrease in donations.

Of course, this is not everyone's experience. I have also received calls and e-mails from groups that were having a hard time raising money after September 11. Often on further probing, however, I discovered that they had been having a hard time for quite a while. A development director called to ask me how she could motivate board members who were reluctant to make their calls since the tragedy. It turned out these board members had consistently been unwilling to do fundraising. September 11 has just provided them a new and very dramatic excuse for their foot-dragging. Whatever problems your organization had prior to September 11 will be more acute now.

To be sure, some organizations have reported that some major donors have decided to give their big gifts to relief efforts. Organizations located in and around New York City and Washington, D.C. had a harder time gearing up for fall fundraising, and they will suffer some loss.

All in all, with some obvious exceptions, there is no inherent reason to think that September 11 will have much of an impact on an organization's ability to raise money from individuals over the long term.

STRATEGY BY STRATEGY ANALYSIS

Though much fundraising will remain unchanged in the aftermath of the September 11 attacks, certain sources of funding are going to change dramatically and most strategies will need some fine-tuning to be sensitive to both the attacks and the current recession.

Foundation Fundraising

Foundations are required by law to pay out 5% of the value of their assets annually. The 5% is based on the average of the value of the foundation's assets during the previous five years. This safeguards foundation giving from spiking in a good year and being dramatically reduced in a bad year. It also allows the endowment of the foundation to grow so that it keeps pace with or, as in the past several years, exceeds inflation.

My advice is to get busy because the days of lots of foundation funding are, at least temporarily, over.

From 1995 through the middle of 2000, foundation assets grew at a record pace, as did the creation of new foundations. In 1999 alone, 3,300 foundations were created, bringing the number of foundations in the United States to 50,200. (When I started my fundraising career in 1976, there were only 15,000 foundations.) For years, foundation giving accounted for about 5% of all giving; in the last three years, however, that percentage has more than doubled, so that foundation giving in 2000 accounted for 12% of all giving.

As the large number of foundations and their huge assets made grantseeking in the last five years much easier than it had ever been, many organizations came to rely on foundation funds. One development director said, "The question became not whether we would get the grants, but could we keep up with the money we were able to generate?"

The five-year average asset value that foundations are using this year still includes some very high-earning years. But by 2003 and 2004, foundation giving will drop dramatically, as the stock market's decline means their endowments are reduced in value each year. Some foundations have already cut back on grant-making, particularly those heavily invested in technology stocks. (A similar pattern occurred after the stock market drop of 1987. The years 1988 and 1989 showed little change in foundation giving, but by 1990, there were major cutbacks.)

If your organization relies heavily on foundation funding, you have one or at most two years to develop other income streams. My advice is to get busy because the days of lots of foundation funding are, at least temporarily, over.

Direct Mail

Direct mail experts are all reporting that mail is performing as well now as it was before September 11, but it will be some time before we can know for sure the full impact. Acquisition mailings are still getting 0.7-1% returns, and mailings to current donors are getting returns of 10% or better. They note that there are a few new things groups will want to do with their mail to ensure it is delivered and opened. Whereas in the past we have suggested adding suspense by not including a return address, that advice is no longer valid. Without a return address on the outer envelope, many people will not open a letter. If you write addresses by hand (which I have often recommended), make sure that the recipient can easily tell who sent the letter by having a clear return address. In the body of the letter, you can acknowledge the war (and whatever the latest manifestation of it is), but don't dwell on it. Focus on what your organization does and why it is important.

With any direct mail appeal in these times, there is the

chance that your mailing will arrive on the day that something terrible has happened. To spread out the risk, you may not want to send thousands of pieces at once.

Major Gifts

Your major donors will continue to be loyal and giving if you intensify your efforts to see them and to let them know how important they are. Some donors who have been giving stock may postpone or cancel their gifts. In order to keep your cash flow from taking a nosedive, you may want to discuss with donors you are close to whether they could give some money now and some later.

One organization with a lot of donors who give stock shows these donors a chart of their monthly cash-flow needs and their monthly expected income from all sources. They then see if the donors are willing to give \$100, \$500, \$1,000 or whatever is possible every month or every other month to help meet these cash-flow needs. In this way, they have managed to piece together enough gifts to get them through the next few months without having to borrow money. One donor who normally gives \$10,000 in stock is giving \$200 a month for the next six months. He will then evaluate whether he can make his stock gift. Obviously if his stock suddenly shoots up, he will make that gift sooner. It is important to be sensitive to the fact that many people who were heavily or entirely invested in the stock market, particularly the NASDAQ, are not doing very well financially.

Many other major donors are still doing fine. If their large gift is derived from their income and they still have their job, they can still give. In fact you will want to focus a lot of attention on the middle range of major donors: those who give \$100–\$1,500, who are giving from income, and who have secure jobs. Last year the *Chronicle of Philanthropy* reported that donors in the \$500–\$1,500 range were the most neglected. They did not give enough to merit attention as major donors at many groups, but they were giving enough that they were often pulled out of the regular direct mail stream. Make personal contact with these donors. Tell them how important they are to your work and do more personal solicitation in this gift range.

Special Events

Somewhat surprising, to me at least, is that special events seem to be doing well. While some groups cancelled events right after the attacks, those who went ahead with their events later in the fall report that they did well. It seemed that people wanted to come together to see each other and affirm that life does go on. If your event is well planned and carefully thought through, it should do well.

To err on the side of caution, though, some groups are scaling back the cost of their event so that if they have to cancel, they won't be out as much front money.

Corporations

Corporate giving is going to vary greatly from one corporation to another. Because of the current economy, many corporations will not be in a position to give for the next couple of years. Others are doing very well and even increasing their giving. They will continue to seek publicity for their gifts. Corporations continue to be under pressure from consumers to be more generous, which is part of a wider consumer concern about corporate ethics. Whether or not corporations are actually more generous is up for debate, but that they want to appear to be is not. Any group that can help them appear to be good corporate citizens probably has a good chance of getting some funding. (See related article in this issue, "Fundraising Medicine: Creating Gift Acceptance Policies," by Rick Cohen.)

EFFECTS OF THE WAR ON TERRORISM RELATED TO PROGRAM

Far more scary to me than the state of the economy are the sweeping powers that law enforcement agencies have sought, and so far won, to investigate terrorists. These new laws may have a profound impact on a broad cross-section of nonprofits. *OMB Watch* reports that the USA Patriot Act, passed by the House and Senate in October, "gives the government broad powers to investigate for intelligence purposes, without requiring probable cause that a crime is involved. The Attorney General or Secretary of State could designate a group as a terrorist organization...and there are no procedural safeguards to protect against a wrongful designation."

Organizations working with immigrants, or critical of US foreign policy, or working to lift the sanctions against Iraq, or with any number of other missions, could find themselves caught up in these "intelligence" investigations. All

nonprofits, but particularly those working on social justice issues, will want to set aside staff and board time to learn the potential impact of these laws and to protest any violations of constitutional rights inherent in new legislation.

In the end, as it always has been, staying focused on fulfilling the mission of your organization must remain the driving element behind all fundraising and program decisions. **GF**

Giving by individuals is not generally affected by recessions.

KIM KLEIN IS CO-PUBLISHER OF THE JOURNAL.

Beyond Branding: *Defining Your Image*

BY CECILIA VOGT AND STEVEN STARLUND

Recently the Campfire Boys and Girls underwent an extensive reworking of their image and market identity, resulting in a new logo and name, Campfire USA. Similarly, The Nature Conservancy began a nationwide promotional campaign after extensive market research indicated that only 5% of the country recognized their name or work. They hired Robert Redford to do voice-overs for an ad campaign calling attention to their mission.

Why did these successful, long-time nonprofits invest many thousands of dollars to re-create and promote their image? They knew that the competition for attention and support to accomplish their mission is never ending and they must constantly clarify who they are and what they do in order to maintain and expand their audience of supporters and potential supporters. This is what Image Promotion is about.

Image is communicated by everything that represents your organization: your name, logo and slogan, newsletters, programs, facilities, and even how you answer the phone. You must be purposeful, consistent, and avoid mixed messages in all you do. For example, if you wish to be seen as a well-organized, efficient agency but your office has the appearance of chaos — lost files, inaccurate records — that image will not be conveyed. If an organization is devoted to social change and its newsletter is mostly chatting about members, it creates an image of a social club rather than a social change organization. If the receptionist answers the phone in a bored or indifferent manner, the impression is given that this is not a dynamic, caring organization. Attitude and style convey as much as words on a page.

Whether your group is a new and emerging entity in your community or an established national organization, effective promotion of your image or identity is needed at all times in order to increase membership, funding, and involvement with the people you serve. To attract and keep these audiences, a clear and direct marketing strategy must be built upon a foundation of your true identity and purpose. "Image Promotion" is the method we use to build that foundation. The process contains two distinct steps: first, defining your image, then promoting it.

IMAGE VERSUS "BRANDING"

In the commercial or for-profit world, corporations spend countless hours and dollars on a process called "branding." While nonprofits may not want to emulate all of the aspects of branding, it is instructive to look at its elements to see what may be usefully translated to the nonprofit world.

A brand is significantly more than a clever name and a catchy slogan. Brands go beyond the physical or obvious product attributes to include intangible values and emotional responses to a product or service. The ubiquitous Starbucks has branded itself to be more than just another coffee shop: it purports to offer the customer a special relationship and personality, a warm, social gathering place where the barista knows your name...or at least your coffee preference. For many customers it has become a status symbol to have a Starbucks cup in hand. This corporate image has been intentionally created and energetically maintained. It works to sustain customer loyalty by addressing what the company perceives as their customers' needs and desires.

Commercial branding techniques are renowned for succinct messages about a company or product. Another, even more amorphous, example of branding comes from General Electric. A multinational conglomerate encompassing many businesses, GE nevertheless promotes itself with an emotional, catchy, and multi-layered phrase, "We bring good things to life." Similarly, Apple Computer has built an entire branding program on the phrase, "Think different," combining it with images of recognizable people who were revolutionary in their time, such as Mahatma Ghandi and Jackie Robinson. The campaign speaks to the propensity of people to identify with the "outsider," the individualist, the one who stood out because they thought for themselves.

The marketing techniques used for corporate branding are not all that different from what nonprofits are trying to do in promoting their own images, so it's instructive to analyze the following elements of what branding concepts do:

- Build an identity for the product or service that has a personality and emotional appeal

- Position a product in the marketplace to distinguish it from competitors
- Direct messages to a targeted audience in order to create demand and loyalty
- Focus on keeping brand identity consistent with other corporate activities

There's one important difference between how corporations develop branding concepts and how a nonprofit would go about developing its image. In order to sell more and more product, corporations *manufacture* their desired image based on an appeal they believe their audiences will be attracted to, not necessarily the inherent attributes of the product. For example, a can of soup is really nothing more than food. But Campbell's has manufactured an image that evokes the feelings of home, hearth, and security, and they have worked hard to sell that image.

Nonprofit organizations, on the other hand, must clearly identify and promote an *authentic* image of who they are and why they exist based upon social need and benefit. With an image that reflects and conveys the mission of their organization, a nonprofit can attract supporters and dollars as successfully as a corporation can attract and hold a customer base with a well-designed brand campaign.

CREATING AN AUTHENTIC IMAGE

These are the critical elements in creating a genuine and effective image:

You build your image on your unique mission, values and personality. These are based upon the *social need* you are in business to address and the *benefit to society* your good work provides. Your organization's social benefit is what attracted you, after all, and will attract a devoted following when you clearly convey how you address that need. Whether you are in the business of saving families or Mother Earth, everyone in your organization must clearly understand and communicate the *same* need and benefit.

Your organization must develop a special relationship with your audiences. This relationship is built with two concepts in mind: the benefits to your audience ("What's in it for me?"), and the emotional appeal of the problems you are working to solve. Your relationship with your audiences must be built upon what's in it for them to get involved with you. This emotional connection is the advantage nonprofits have in the marketplace. For example, arts organizations are successful when they address their audiences' need to be closer to the artists and know that they are keeping the arts alive with their support. Volunteer service groups find that people get involved not only in order to be doing good for others, but also because

it's a way to meet like-minded people and to connect to their larger community.

Your organization must distinguish itself from all the other organizations (your competitors) that serve a similar need. Clarification of your role and functions with programs that truly address the need will highlight your uniqueness. Often, organizations get side-tracked with activities that do not relate to or solve the social need they were formed to address; this muddies your image in the eyes of your supporters. For example, a social service organization with the mission of improving parenting skills should not be tempted to teach job-readiness skills as well.

Often a donor or friend will suggest an expansion of an organization's work because "someone has to do it," or because they think it may allow them to make some money to support their regular programs. In reality, resources get diverted and people become confused about the real mission of the organization.

Rather than create an image around many programs and activities, you must promote and focus on a few programs that best advance your mission. You will be recognized and remembered for a few exemplary programs. For example, while the Lion's Club is noted for community service in general, most people would be able to cite their eyeglass distribution program as their primary business.

STEPS IN BUILDING AND PROMOTING YOUR IMAGE

The following four steps in identifying and clearly defining a consistent image for your organization are ones you engage in with all of your key stakeholders: board, staff, major supporters, and others who care deeply about your mission. The fifth and final step is the creation of a Positioning Statement from which you develop the approaches to your marketing and fundraising programs. When done inclusively, image-building creates a sense of ownership and excitement that reinvigorates everyone to work together and move into the future with a feeling of promise and purpose. The process may take one or two full days and you may want to bring in a facilitator to help.

Step 1. Go back to the beginning of why your group got started: Identify the *social need* you address and the *social benefit* that results from the work of your organization.

Activity: As a group, brainstorm all the needs you address and the benefits you provide, writing them on a flip chart in two columns, one for need and one for the resulting benefit. There can be as few as five and as many as fifty needs and benefits that the group will identify. The number does not matter; you'll know you're done when no new ones come up. The next step is the hard part: condense this list down to *the one primary social need you are*

in business to address and the one benefit that is the result of your work. Consensus on this is critical; it is pointless to go further until all agree that this is why you are in business.

For example, the fictional Wildwood Conservancy fills the need to protect and preserve local threatened landscapes and sensitive environments. Their work results in the social benefit of open space and habitat for present and future generations of people and wildlife.

Step 2. Identify your Organizational Values. Values have to do with how you do your work, how you are organized, the type of programs you have, how you treat each other, how you talk about your organization — everything you do! Everyone doing your good work must know, agree upon, and act on those values.

Activity: Team up in groups of three or four and brainstorm all values that are important. They can include honesty, thrift, friendliness, collaborative, creative, stylish, innovative, etc. Each group then distills the list to their top five values. Each group's top five are written on the flip chart. From here the entire group distills the list down through voting or discussion to the most important values. Consensus on your key values is a must.

For example, Camp Fire's entire program was built around the values of work, health, and love. They even created their own word for it, "Wohelo." Say Wohelo to any Camp Fire alumnus and they know what that means because of their buy-in to those values. Wildwoods's list of values might include efficient, accessible, responsive, economical, and flexible.

Step 3. Evaluate your Mission Statement: Does your mission statement fully reflect the need, benefit and values you have just identified? Will these words create change and call people to action?

Activity: As a group, review your mission statement guided by the following questions: Is it specific, does it provide program direction to staff and stakeholders, will it cause change, does it describe the future and inspire people to act? If it does not do all of this, it's time to rewrite your mission statement. Rewriting a mission statement is not something that will be accomplished in a workshop about image promotion. But, if you have identified the need to rework your mission statement, create a separate process for that to happen, involving board, staff, key volunteers, and clients, if appropriate. A good mission statement can take a while to craft and must be agreed to by all the principle people of the organization.

Step 4. Identify your Key Audiences: Your audience includes two types of people: those who use your service and support your service (intentional), and those who

oppose you or are in competition with you (unintentional). You must identify all audiences and what's in it for them to be involved with you.

Activity: Through brainstorming, identify all of your audiences. Narrow the list down to the top three most important audiences — those critical to accomplish your mission. For each of these, list the benefit to them for their involvement and support. Focus on the intentional audiences for now. The unintentional audience list should be saved and reviewed when you begin to discover audiences' resistances to your messages.

For example, an Oregon birthing center was having trouble finding clients, despite trying to become better known by doing broad TV advertising. They learned

through a simple marketing survey interviewing people at local stores that their real audience was more specific: mothers and families who might use and recommend this center to their friends and neighbors. Though the survey showed that this audience had little or no awareness of the center and its work, it also revealed that potential clients were interested in seeing the center for themselves. As a result, the center placed targeted ads in the local newspaper highlighting the staff (creating an image of personal caring) and inviting mothers to tour the center with their families. This personal appeal struck a chord: tours were full and the nurses became local celebrities. The business grew because they gave their audiences what they wanted.

Next: The Positioning Statement

Once these four foundation steps are completed, you are on the road to portraying an accurate image of your organization. This image will produce a better understanding of who you are and why you should be supported. You will also be able to look at your programs in terms of their effectiveness and appropriateness, understand your emotional appeal, and create a marketing strategy directed at your audiences and their interests.

In commercial branding, this image work culminates in a *positioning statement*. Nonprofits should have one too. The positioning statement is the core message that you want to deliver in every medium, positioning you in the marketplace for attention and support. It describes how you want the world to perceive you and why people should be involved with you. While the positioning statement is based on your mission, it does more than a

Your positioning statement describes how you want the world to perceive you and why people should support you.

mission statement as a promotional tool.

To outline your positioning statement, answer the following questions. Use the answers to write a polished statement.

- Who are you (name of organization)?
- What business are you in (purpose and programs)?
- What people do you serve (who benefits from programs)?
- What are their needs (social needs you are in business to satisfy)?
- With whom are you competing (in general, not specific)?
- How are you different from your competitors (your appeal)?
- What is the unique benefit from your services (what do you offer the community that no other can)?

Upon the completion of your positioning statement, you will have built a strong and succinct professional approach to future marketing strategies and fundraising campaigns. The statement provides appropriate themes and program ideas and will serve as a blueprint as you develop your marketing and outreach programs and tools.

One final point: Your positioning statement is the culmination of all of your market analysis and organization's values and intrinsic qualities. It outlines your position in the

market place and how you will distinguish yourself to your audiences in everything you do or say or publish. Adhering to the elements of this statement is your positioning strategy. Pay attention to how you are seen in your graphics, themes, solicitation letters, PSAs. Repetition of your accurate image will continually reinforce your mission and reputation in the eyes of your public. Your positioning statement, once refined, can be readily used as a sidebar for fundraising letters or as a final note on a brochure or as an introductory part of your script when talking to donors. It is your 30-second marketing pitch and can be used in any conversation with clients, potential members, donors, and so on. It will set you apart and provide a consistent message for all your members and constituents to use.


As you can see, Image Promotion is about clarifying your business both internally and with your audiences. Once all of your organization's actions are related to need and benefit and reflect your values, your image promotion will be accurate and effective. Imagine how powerful this finely tuned image and forthright marketing will be in attracting people and funds. **GFJ**

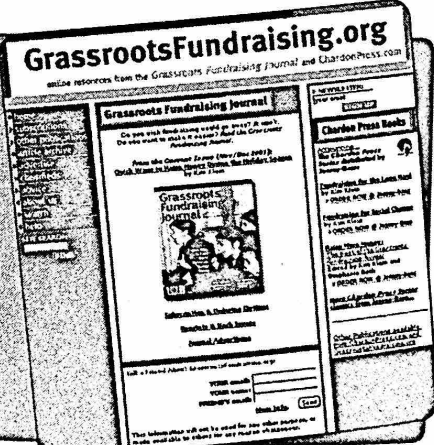
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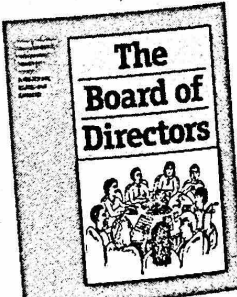
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Fundraising Medicine:

CREATING GIFT ACCEPTANCE POLICIES

BY RICK COHEN

EDITOR'S NOTE: A Gift Acceptance Policy specifies what kind of donations your organization will — and sometimes will not — accept. Groups seeking large gifts for capital and endowment projects, for example, need to decide if they will accept gifts that may be difficult to sell, or require management skills and time beyond what is appropriate to expect of staff, such as real estate, jewelry, or art. Groups seeking corporate funding may wish to think about which funders they are approaching. Many groups have a simple policy such as, “The Board of XXX Group reserves the right to decline any gift that is deemed not to be in the best interest of the group or that is beyond our resources to manage.” In this article, Rick Cohen argues that groups may wish to go further, particularly in dealing with corporate funding.

The concept of “gift acceptance policies” sounds passive, as though nonprofits choose to snag some offers of grants that come along and pass on others. Though it is for many organizations a rare occurrence, corporate givers do offer unsolicited gifts. Such has been the case with the organization I direct, the National Committee for Responsive Philanthropy (NCRP). NCRP is a philanthropic advocacy “watchdog” that promotes increased philanthropic giving to disenfranchised and disadvantaged populations.

NCRP is a small but somewhat influential critic of the world of philanthropy. There are times when a funder — be it an individual, corporation, or foundation — has offered to give money to NCRP with an agenda in mind. Such was the case when an intermediary asked us to consider taking a pretty sizable grant from a corporation with a troubling history of exploiting child laborers in the Third World. The intermediary tried to sell us on helping the corporation look good in exchange for what they characterized as desperately needed hard money for the always cash-strapped philanthropic advocacy group. NCRP had the sense to turn the offer down.

Another time a careless error left us in the position of receiving a foundation grant to examine the problems of tobacco-linked philanthropy to racial and ethnic groups at the same time that we were receiving a small grant from one of the cancer-causing corporations themselves. Needless to say, at that time NCRP had no formal gift acceptance policy. Even more remarkably, we completed a study on racial and ethnic grantmaking with a companion

workbook on principles for corporations and nonprofits. Still, there seemed to be little impetus on the part of the NCRP board to generate a policy. Drawing on the excellent guidance in our research on corporate grantmaking for that study, I decided to apply some fundraising medicine to NCRP in the spirit of “doctor, heal thyself.”

I saw that a gift acceptance policy would provide our fundraising with important guidance, as such policies address three key questions:

- What kinds of corporations will a nonprofit solicit for funding, and what kinds will it avoid or reject?
- What conditions or restrictions imposed by the grantmaker will the nonprofit accept?
- How will the nonprofit evaluate corporate grantmakers as potential funders?

DEVELOPING CORE STANDARDS

NCRP began by looking at various gift acceptance strategies and alternatives, and applying various “smell tests” and other methods for considering corporate grants. At first, some board and staff suggested policies in which NCRP would solicit and accept corporate grants without limitation. This suggestion was based on the common theory that every corporation has some problems someplace in environmental, racial discrimination, and other areas of corporate behavior, so there is no truly “clean” corporate charitable funding. In fact, our own report had cited the increasing interest of corporations in “strategic grantmaking” and corporate bottom-line

considerations, making charitable intent suspect. So why not simply take the money, and by NCRP's use of the funds, make it charitable and productive?

Though many nonprofits encounter this typical argument, for us it was damning all corporate funding with too broad a brush. We felt we needed to adopt policies consistent with NCRP's history as a philanthropic watchdog promoting increased philanthropic giving for those in the U.S. with the least wealth and least economic opportunity.

Moreover, I felt that it was crucial to our credibility and reputation that we embrace the standards we were promoting for others. The adoption and use of a gift acceptance policy conveys to the outside world what kind of organization you are, what you believe, what you value. The policy we developed incorporates critical components of NCRP's beliefs, including our anti-racism commitment; our opposition to discrimination based on gender or beliefs; our support for environmental justice, social justice, and civil rights; and our commitment to working men and women and organized labor. Yet the policy is meant to be uncomplicated and relatively easily applicable. It has the following five core standards:

1. We should seek and accept corporate funds that clearly fit our agenda and give us desirable flexibility in their use. That doesn't mean that we believe that corporate money comes without strings or that corporate money is somehow more restrictive than foundation funding, but we should be seeking funding that isn't so restrictive that it prevents us from doing what we want and need to do.

2. We should not seek or accept funding from corporate grantees that expect a quid pro quo from us in terms of public policy or industry regulation. For example, were a grant from a bank to come with the expectation that we would testify in favor of the bank during a merger review, that would be unacceptable.

3. We should not seek or accept funding from corporations that expect NCRP to promote corporate products in our publications or at our meetings and conferences.

4. We should not seek or accept any grants that would compromise NCRP's mission or credibility. Although fundraising is a proactive initiative, meaning that we should be able to avoid potential funders whose behavior or policies would compromise our credibility, we should have a process for allowing staff and board to review our list of potential corporate funders and point out potential problems. Moreover, we should have an internal process for conducting due diligence on potential corporate funders to ensure that we are appropriately informed about issues and prepared to reject potential funding.

5. We should be open to receiving a grant from a corporation that has been involved in a public policy

controversy or hazardous mishap once the controversy or mishap has passed and the corporation has taken significant steps toward amelioration of both the incident and the policy. That doesn't mean we should accept grants from corporations that simply want to use NCRP to "look good," but we shouldn't reject grants due to past corporate histories that are clearly no longer indicative of the corporations' current practices and policies.

6. Since NCRP is dedicated and committed to a just and democratic society and the promotion of sustainable development, human rights, human dignity, and equal opportunity, NCRP will not solicit or accept contributions from corporations whose operations include practices we deem unacceptable and contrary to the values implicit in NCRP's mission. Among those corporate operations and policies that make corporate funders unacceptable are the following:

- production and promotion of tobacco products
- production and promotion of firearms
- human rights abuses
- active anti-labor policies, including sweatshop abuses, child labor infractions, etc.
- blatant and avoidable environmental abuses

Finally, NCRP identified the policies we want to see in potential corporate givers:

- Corporations with women and minorities in management positions and on the boards of directors, and with progressive policies regarding purchasing from or investing in women- and minority-owned businesses, and with progressive policies regarding hiring programs for the disabled, and with progressive policies toward gays and lesbians in the workplace. (We should avoid companies with a pattern of discrimination based on gender, race, religion, disability or sexual orientation.)
- Corporations with a commitment to and history of fair labor negotiations. (We should avoid companies that are listed on the national AFL-CIO boycott list or that otherwise violate basic labor laws or engage in unfair labor practices.)
- Corporations that show respect for the natural environment in their ways of conducting day-to-day business. (We should avoid corporations that frequently or consistently violate federal, state, and local environmental regulations.)
- Corporations that pay fair wages, support human rights, and protect the environment when they operate in less developed nations.
- To identify corporations worth soliciting for support,

NCRP will look to corporations on the Domini Social Equity Fund list, corporations meeting the Citizens Funds social screens, and corporations meeting the Council on Economic Priorities's corporate conscience standards.

THE RESULT: THINKING MORE DEEPLY

The gift acceptance policies we developed are first and foremost a reaffirmation of NCRP's organizational mission, a tangible reminder of why we exist and what we stand for. We realize that the application of the values in the gift acceptance policies need not be limited to corporate donors. Foundations have biases, individual donors have specific interests, foundations and donors set conditions just as corporate grantmakers do.

Besides the expansion of their applicability beyond corporations, the other benefit of the policies was that they gave us a chance to rearticulate our core organizational values and beliefs. For the organization — and for me personally — the NCRP gift acceptance policy reconnected us with the grassroots organizing that is raising questions about global corporate policies. Moreover, the inclusion of the AFL-CIO corporate boycott list as a core component of the gift acceptance policy strengthened NCRP's commitment to organized labor, to fair wage campaigns, to social justice for America's working families.

The best gift acceptance policies are based not on a crude calculation of how to get grant monies from corporate donors, but are statements of principles and values that

motivate the nonprofit's work in our economy and society. For this reason, I am more than pleased that NCRP confronted its own values and beliefs and examined their applicability to NCRP's fundraising strategies and potential for fundraising within and beyond corporate grantmakers. **BT**

RICK COHEN IS PRESIDENT OF THE NATIONAL CENTER FOR RESPONSIVE PHILANTHROPY.

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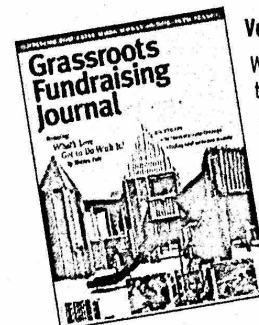
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Best Practices of Effective Organizations: ON ONE PAGE

BY MARIANNE PHILBIN

Donors and volunteers are part of the “means” that help nonprofits reach their programmatic “ends,” and the roles they play increasingly require them to make complex decisions affecting nonprofit growth, stability, and effectiveness. Committed as they may be to their favorite organizations, however, few donors, volunteers, or board members actually have time to research current standards in the sector, interview more seasoned peers, carefully follow nonprofit trends, or read textbooks intended for full-time nonprofit professionals.

The day-to-day existence of nonprofits may indeed be dependent on the passionate involvement of civic leaders and community members, but their passion does not necessarily come with extensive background in nonprofit operations or organizational development — or with unlimited time for their nonprofit work.

Sometimes it seems that the more decisions we need our board and volunteers to make, the less time we have to fill them in on what they really ought to know in order to make those decisions properly.

As one business owner newly appointed to a nonprofit board said to me recently, “Okay, tell me everything I need to know about running an effective nonprofit...but keep it to a page.” He was only half-kidding.

In an attempt to rise to that challenge, here is a chart — on one page, as requested — designed to help nonprofit supporters quickly familiarize themselves with the strategies, structures, and best practices that contribute to the development of healthy organizations.

More could be said, of course, about all that contributes to the development of a healthy and effective organization. Over the course of my work with nonprofits, however, I’ve noticed that it’s not the details that

tend to be lost on program officers, board members, major donors, and nonprofit staff. We all do surprisingly well on the details. More often than not, when an organization hits a bumpy patch, it’s because of a misstep back at square one, a fundamental misreading of what’s necessary and appropriate, a wrongheaded notion — in some cases a downright delusion. (The frustrated executive director of one nonprofit I was working with, for example, told me he wanted to “explore alternative models” for his agency. As I worked with him, I learned that what he was looking for was “an organizational model” that wouldn’t require the agency to fundraise or work with a board of directors.)

The chart on the following page offers a quick sketch of the underlying attitudes and approaches that determine the direction of nonprofit organizational growth, and that can often signal whether an organization is headed towards chaos or stability. With our donors and boards, we tend to discuss what we believe about program, but rarely do we discuss what we believe about the rest of our day-to-day work. On what assumptions and around what ideas are we building (or not building) our fundraising program, our communications program, our management and operations strategies? The business of becoming effective organizations requires an awareness of where we stand on all these issues and an understanding of the practices that can best support our development. **[GF]**

MARIANNE PHILBIN IS A CHICAGO-BASED CONSULTANT. HER BOOK, *HOW EFFECTIVE NONPROFITS GET THE JOB DONE: A BRIEF GUIDE FOR OVERLOADED DONORS, VOLUNTEERS AND BOARD MEMBERS* (WRITTEN WITH MARCIA FESTEN), WILL BE PUBLISHED THIS SPRING BY NEW VENTURES IN PHILANTHROPY.

Strategies, Structures, and Best Practices of Less Effective and More Effective Nonprofit Organizations

LESS EFFECTIVE

MORE EFFECTIVE

MISSION, VISION, PROGRAM

Prompted by individual charitable impulse	Prompted by thoughtful, collective decisions
Program shaped most by service <i>providers</i>	Program shaped equally by service <i>recipients</i>
View of work is broad, mission is vague	Mission is clear, view is strategic, niche-specific
Some tendency to serve private/special interest	Clearly focused on serving public interest

TEAM, STRUCTURE, GOVERNANCE

Board and staff roles unclear, melded	Board and staff roles clear and separate
Board micro-manages all functions	Board sees chief duties as policy-setting, overall stewardship and financial health
Volunteer development haphazard	Volunteers trained, managed, rewarded
Board believes policies are "implicit" in work	Board makes policies "explicit," in writing
Decision-making dominated by founders or other small group of stakeholders	Decision-making by board as a whole, following established channels and protocols
Board gets involved in hiring all staff	Board only hires Executive Director; Executive Director hires others
Progresses by fits and starts, project-to-project	Develops and regularly consults strategic plan
Nominations process is eccentric, random	Nominations process is a process

RESOURCE DEVELOPMENT, FINANCIAL MANAGEMENT, OPERATIONS

Budgeting often begins with what the organization thinks it can or should <i>spend</i>	Budgeting begins with assessment of needs, and with what the organization thinks it can or should <i>raise</i>
Organization allows spending outside budget	Organization uses budget as management tool
Fundraising is scattershot, whimsical; often heavy reliance on a few core donors	Fundraising is staffed, annualized, maintained by clear systems and multiple strategies
Organization hesitant to invest in fundraising infrastructure or communications; fears spending on anything but program	Organization understands it must invest in itself to survive and grow; to publicize & deliver programs properly, and to reach out to new constituents
Sees fundraising only as means to budget goal	Also sees fundraising as public education & communications, a way to reinforce program
Exclusive reliance on government and foundation grants	Individual contributors also part of the mix
Few board members make financial contributions, think volunteering is enough	100% board giving, no matter what the level
Frequent crisis cash-flow borrowing	Short and long-term financial planning and cash management policies in place
No one reads or understands the audit	Leadership understands what audit conveys
Lives within inadequacies of existing space, often tailoring program to the space	Develops facilities plan so that space can ultimately be tailored to program needs

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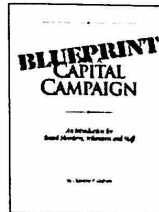
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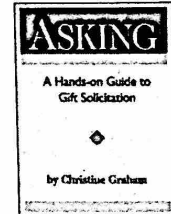
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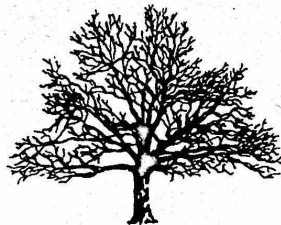


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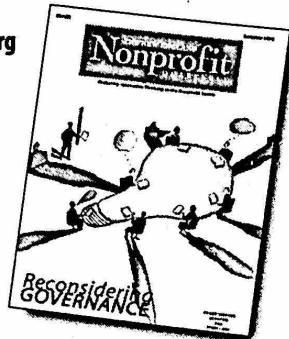


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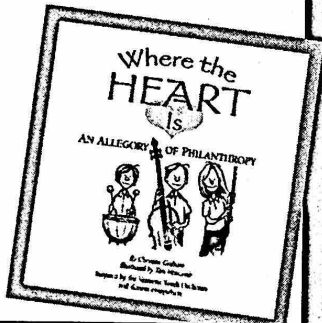
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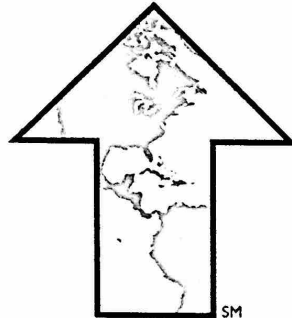
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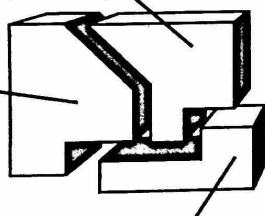
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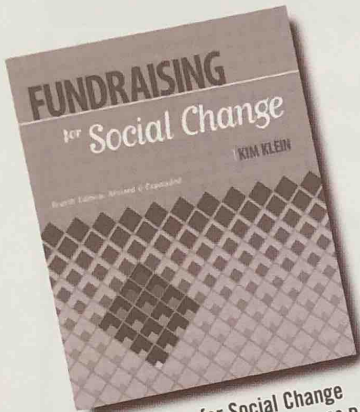
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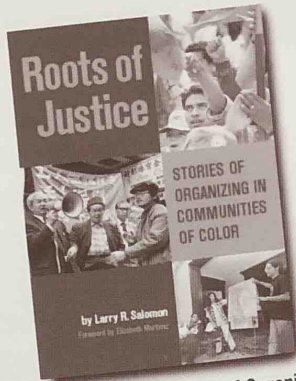
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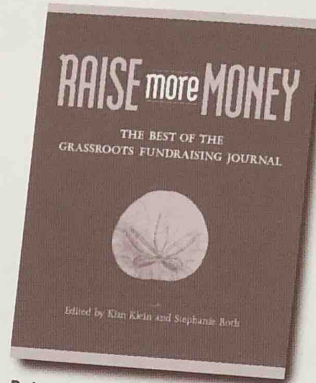
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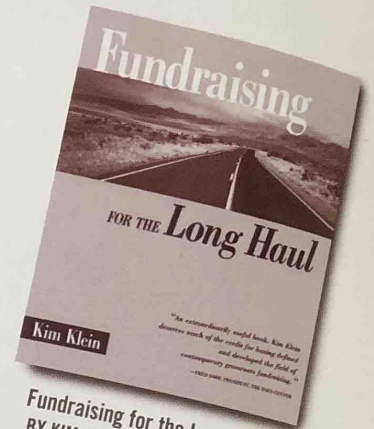
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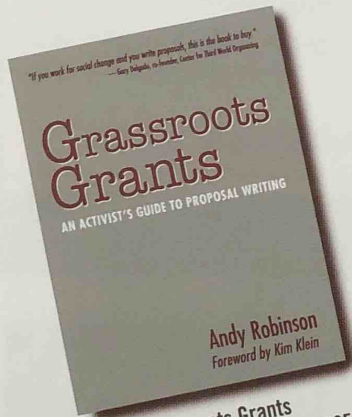
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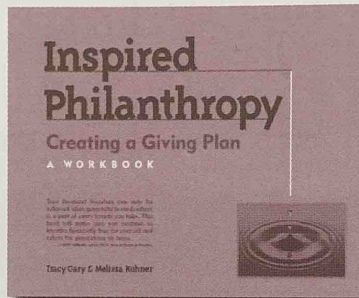
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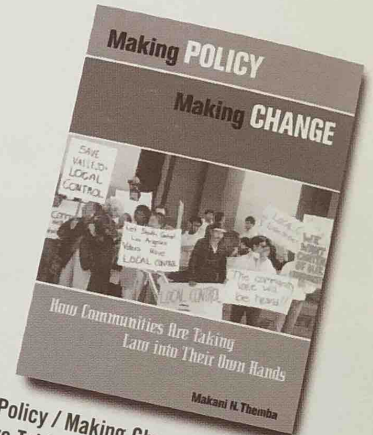
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