

# Grassroots Fundraising Journal

VOLUME 21 • NUMBER 2 • MARCH / APRIL 2002

Featuring:  
**Transforming  
Donors into  
Grassroots  
Fundraisers:**

**Seeds of Hope Campaign,  
A Case Study**

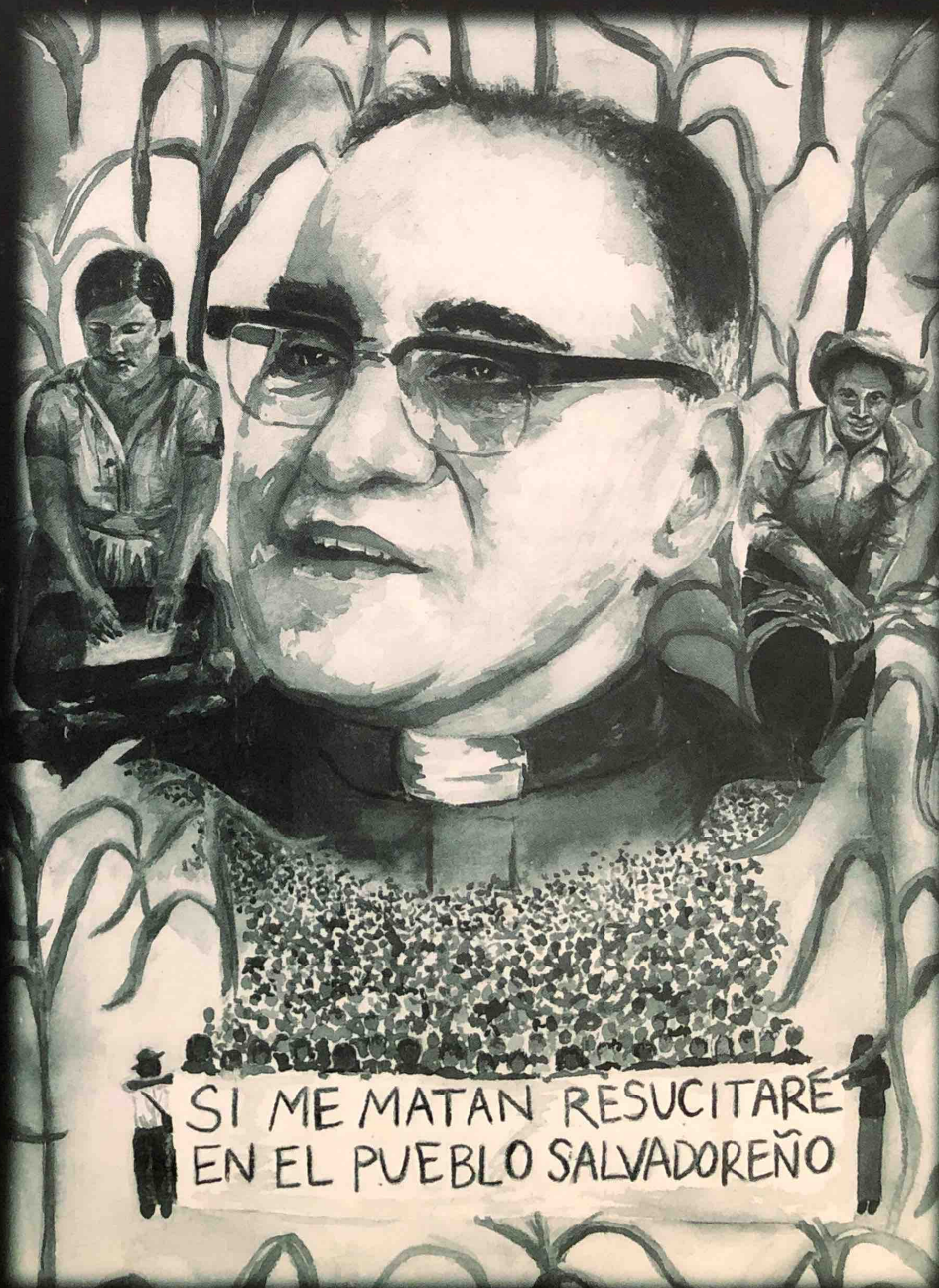
BY MELISSA BANGS

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**THE COMMUNITY RAP:  
A PRESENTATION TOOL  
FOR COMMUNITY LEADERS**

**IS ENDOWMENT FOR US?**

**LET'S TALK ABOUT  
PLANNED GIVING**



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**On Our Cover** "IF THEY KILL ME, I WILL COME BACK TO LIFE IN THE PEOPLE OF EL SALVADOR." THIS STATEMENT BY ARCHBISHOP OSCAR ROMERO, ASSASSINATED IN 1980 FOR HIS WORK AGAINST THE BRUTAL SALVADORAN GOVERNMENT, IS REPRESENTED ON THE COVER OF THIS ISSUE IN A PAINTING BY MELISSA BANGS. MELISSA IS ALSO THE AUTHOR OF OUR LEAD ARTICLE ABOUT THE SHARE FOUNDATION'S SUCCESSFUL "SEEDS OF HOPE" FUNDRAISING CAMPAIGN.

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## LETTER FROM THE PUBLISHER

KIM KLEIN



Those of you who have been reading the *Journal* for the past few years will note that we regularly discuss strategies, such as capital campaigns or planned giving, that don't fit the stereotype of what "grassroots" groups would be doing. That's because we believe that "grassroots" is a philosophy of fundraising rather than just a catch-all description of small-scale fundraising strategies. An organization with a budget of \$2 million, for example, that has a broad base of thousands of donors and uses a wide variety of strategies to raise money is far more grassroots than an organization with a \$250,000 budget with 95% of its income from foundations. Further, we have seen grassroots groups seek and receive bequests, conduct capital campaigns, and build endowments, and we want to share how others can use those strategies.

The articles in this issue point out that an organization's true mainstay is its donors. If treated respectfully, donors can be counted on to yield a certain amount of money year in and year out, more predictably than any other type of investment. The donors who give you money year after year need to be also given the opportunity to provide for you in their wills. Remember, those estates are going to go somewhere—why not to your group? For myself, recognizing that the work of social change is not going to get done in my lifetime, I have left most of my estate to organizations that I care about. I hope they won't get my stuff for a long time, but I feel good knowing that I have made those arrangements, and that what I worked for during my life, my legacy will continue to work for.

In light of these life-and-death considerations, it is fitting that Archbishop Oscar Romero graces our cover. Although I knew almost nothing about him during his lifetime, Archbishop Romero became a hero of mine after his death. He was assassinated while saying Mass in El Salvador in March, 1980. He had been an archbishop for only three years and came reluctantly to that post. He was a scholar and often remarked on how timid he felt being such a public figure. Yet his sermons galvanized the poor in El Salvador and he became an international voice against violence and oppression. His "estate" is his writing and his sermons, and it is through these that many people have come to know him. One of my favorite quotes from Archbishop Romero is this: "All pomp, all triumphs, all selfish capitalism, all the false successes of life—all of that passes away. What does not pass away is love. When one has turned money, property, work in one's calling into service of others, then the joy of sharing and the feeling that all are one's family does not pass away. In the evening of life, you will be judged on love."



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# *Seeds of Hope Campaign:*

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*A Case Study in Transforming*

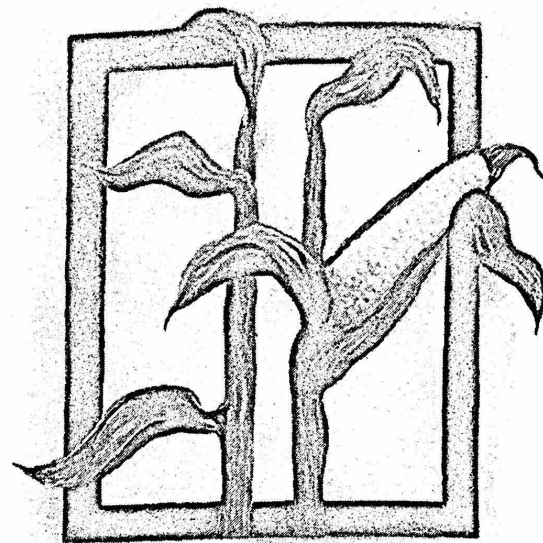
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*Donors into*

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*Grassroots Fundraisers*

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BY MELISSA BANGS

Like most development directors, I fantasize that the donors who give to my organization will begin to fundraise for us within their families, communities, at their work place, and as far as their networks travel. In the year 2000, the Development Team at the SHARE Foundation launched a campaign that began to make that fantasy a reality. We call it "The Seeds of Hope Campaign." This article describes how we managed the campaign and the elements that made it successful so that you, too, can turn your donors into fundraisers.

The SHARE Foundation: Building a New El Salvador Today works to help impoverished and marginalized Salvadoran communities as they seek long-term, sustainable solutions to the problems of poverty, underdevelopment, and social injustice. As with all grassroots organizations, fundraising is an ongoing challenge. The concept of the Seeds of Hope campaign was to ask donors throughout our base to commit to becoming a "Seed of Hope" by agreeing to raise \$1,000 from within their families, communities, and work places.

At the heart of the campaign is the understanding that the closer a donor feels to an organization, the more she or he will give and the more likely she or he will continue to donate year after year. When a donor makes a transition from giving to an organization to actually fundraising for that organization, they begin to absorb and take ownership of the organization's work in an entirely new way.

Throughout the campaign, we have witnessed donor after donor make that transition to grassroots fundraiser. They have written fundraising appeals, thrown house parties, made donor visits and one-on-one asks, and asked

for gifts to SHARE in lieu of wedding presents, engagement presents, Christmas presents, and more. We have watched their ability to articulate the work and what most inspires them about it expand ten-fold. As these donors have asked their friends and communities to give to SHARE, they have indeed begun to take ownership of the work. They have actually become a part of SHARE.

The success of this campaign is measured not only by the total amount of money raised and by the vast numbers of prospects the campaign has produced, but also by the numbers of relationships we have strengthened with the core group of donors who made the commitment to be a Seed of Hope. These stronger relationships are reflected in the size of the gifts from these donors and, as we hope to see for years to come, the length of their commitment.

## **THE LAUNCH**

The SHARE Foundation has worked in solidarity with the Salvadoran people as they have struggled for basic human rights and socioeconomic justice for the past twenty years. In 1980 civil war broke out in El Salvador. The root cause of this conflict was landlessness and poverty. During the war SHARE helped organize the poor and refugees with grants to projects, advocacy work that called for the end of the U.S.-backed war, and moral and spiritual support. In 1986, we began to aid thousands of refugees as they risked their lives to return to their communities to be a part of the peace process. Since the signing of the Peace Accords in 1992, SHARE has contin-



ued to accompany the organized rural poor as they strive to be architects of sustainable, justice-based development in their communities. The living memory of the martyrs, including Archbishop Romero, the six Jesuit priests, the four U.S. churchwomen, and 75,000 others who were killed during the war continues to fuel the Salvadoran struggle for justice.

In March 2000, nearly 60,000 people came to El Salvador from Japan, Africa, Europe, and throughout the Americas to commemorate the 20th anniversary of Archbishop Romero's assassination. The SHARE Foundation hosted a 103-person delegation to celebrate this event, sponsoring people who have relationships with SHARE through many different avenues. Some were members of a parish in the United States that is sistered with a community in El Salvador. Others are Salvadorans living in the U.S. who are a part of a growing network of Salvadoran-American SHARE committees. Still others are individual supporters, faith based and secular, activists and volunteers. Nearly every delegate was already a SHARE donor. Some had given one or two gifts while others had accompanied SHARE and the Salvadoran struggle for justice for ten to fifteen years.

On the fourth day of this profound, awe-inspiring delegation we launched the Seeds of Hope Campaign. We waited until delegates had discovered and rediscovered the heart of why they were drawn to the continued struggle for justice in El Salvador, as they visited citizen participation and women's empowerment projects that SHARE supports in the countryside and took part with more than 60,000 others in a procession and vigil. At that point, we asked a room of about 70 of the delegates to commit to becoming Seeds of Hope. They would have one year to fulfill the \$1,000 commitment. Thirty-seven people in the room committed. Of these, 25 fulfilled their commitment of raising \$1,000. Ten raised beyond the \$1,000; in fact, one person raised \$60,000! We call her the Garden of Hope. Collectively, this initial group raised \$99,000.

### Key elements of the launch

These were the elements that made the beginning of the campaign so successful.

- The request to join the campaign came at the end of an inspiring day, before people got too tired and during a party with music, food, laughter, and good feelings.

*The concept was for donors to become a "Seed of Hope" by agreeing to raise \$1,000 from their families, communities, and work places.*

- We had a giant scroll with a corn stalk drawn on it on which people were asked to sign their name as they made the commitment to become a Seed of Hope.
- We had asked some people ahead of time to commit to be a Seed of Hope at the launch. These people were also prepared to give an inspiring testimony about why they wanted to make that commitment.
- The actual pitch was staggered among three speakers. One reason we decided on this method was that among the three of us we had personal relationships with nearly everyone in the room. Another reason was that we each have very different styles of asking. SHARE's Executive Director asked in a very powerful personal manner, amounting nearly to a testimonial. The El Salvador Director asked for commitment to the project within the context of the history of the martyrs and the principles and values at the heart of the continued struggle. I called to mind the faces and stories we had experienced that week and asked people to remember those who had touched us deeply that week.
- We paused after each of us spoke, allowing ten to fifteen people to commit before the next presentation. We could have chosen to give up after the first or second long, drawn-out pause but we continued on. Even after the third long pause, at least ten more people committed to being Seeds of Hope.

Of course, not every organization has the opportunity to celebrate the memory of a martyr who is known throughout the world and not every cause can recreate the collective songs, tears, and goose bumps of 60,000 people in the heart of San Salvador. On the other hand, every organization can find ways to bring its donors in celebration to the heart of its work. That is where the request to join the work is the most powerful and produces the best results.

### ONGOING RECRUITMENT

While the delegation appeal produced by far the highest yields, we continued to implement recruitment pitches in a variety of ways throughout our work in 2000 and 2001. Here are the additional ways and places we appealed to our donors to become Seeds of Hope:

- Direct mail appeals (including becoming a Seed of Hope as one option on the reply device)

- Sustainer letters (as a P.S.)
- Progress report (as one option on the reply device)
- During one-on-one visits
- At local events
- On our Web site
- To additional delegations

Second to the delegation appeal, the one-on-one requests and requests at local events have proven to be the most effective modes of asking for a Seed of Hope commitment. Although only a handful of people commit to being Seeds of Hope through any one direct mail appeal, sustainer letter, progress report, or on the Web site, we have found it well worth including a Seed of Hope appeal on a reply device or in a P.S. because of the power in repetition.

For every Seed of Hope, not only does the organization stand to gain \$1,000, we also stand to gain from three to fifty new donors.

## THE CAMPAIGN

The ongoing campaign has focused on keeping in touch with our Seeds of Hope donor-fundraisers and following up with each prospect and new donor.

### Maintaining contact

After a donor committed to becoming a Seed of Hope we kept in touch with them at various points throughout the year of their commitment, sending three mailings and making one or two follow-up calls. We sent the first mailing within one month of their commitment, and the next two about two to three months apart. We did follow-up calls after the second and third mailings.

The mailings consisted of various core pieces and met a number of objectives.

- A personal hand-written cover letter, in which I connected with each Seed of Hope in a personalized manner, thanked them for their on-going commitment and let them know that I was there to support them in their efforts.
- Updates on SHARE's work, which provided the Seeds with current materials for their appeals.
- Articles and outlines containing fundraising ideas and step-by-step guides.
- Sample fundraising letters from other Seeds of Hope as well as written descriptions of successful and creative fundraising efforts of other Seeds of Hope for inspiration.
- A visual update of the projected campaign goal and

current totals. Because corn is central to the Salvadoran people's way of life and a part of SHARE's logo, I used an image of a cornhusk in which every kernel of corn represented \$500. Since thirty-seven people committed to be Seeds of Hope in the initial group, I drew the cornhusk so that when full, it would contain 74 kernels, or \$37,000. With each mailing, the cornhusk continued to fill with kernels of corn.

Follow-up calls proved to be crucial for the campaign. Not only did the calls allow us to cultivate much more personal relationships with donors, but we were also able to intercept people in moments of fear around fundraising or simple procrastination. We also used the phone calls to give updates in person from the work in El Salvador. On all phone calls, we took notes about individuals' fundraising efforts to share with others. We also noted

the pieces of SHARE's work that most appealed to each donor and recorded this information in our database for future fundraising efforts with that person.

After each round of calls a new wave of energy would emerge from the Seeds of Hope efforts. In many cases people truly found new courage after our contact with them. In other cases we were simply able to increase the fire a little in their burner.

Even at the end of the year,

we found people raising their Seed of Hope commitments in the twelfth and even as late as the eighteenth month due to year-end calls.

*When a person  
moves from donating  
to fundraising for  
an organization,  
they begin to take  
ownership of the  
organization's work.*

### Thank yous

Although perhaps painfully obvious, it still bears repeating that crucial to this and any fundraising campaign are prompt and personal thank yous. We wrote thank-you notes not only to the donor of each individual gift raised by the Seeds, but we sent periodic thank-yous to the Seeds of Hope as well.

### Prospecting

Also key in the campaign was ensuring that the donor of each gift was either put on our direct mail list or on our major donor list. The original thirty-seven Seeds of Hope yielded a total of 309 new donors.

Our objective has been to visit and/or ask for an additional gift from each one of these donors within two or three months of the initial gift. All donors who gave \$500

or more were put on the major donor list and we have attempted to connect with them by phone or visit within the first few months. If they gave \$499 or less, we ensured that they received a second appeal within three months. Because our donor base is spread throughout the country, it is extremely difficult to visit as much of our base as we would like. For an organization whose donor base is local, I would suggest trying to visit as many of these donors as possible within a few months.

### Donor recognition

At the end of the first year, we sent a symbolic gift to each Seed who had either met their fundraising goal or had come very close (\$800 or more). The gift was a book-mark with a watercolor painting of a husk of corn and a beautiful quotation from one of Archbishop Romero's homilies that refers to the power of individual acts for peace and justice.

### THE RESULTS

Now twenty-one months into the Seeds of Hope Campaign, 72 donors have committed to being Seeds of Hope. In total, they have raised \$114,000 and have brought to SHARE 414 new donors.

In its initial phases, the campaign required an average of five to eight hours of staff time each week. Once the campaign was running, it required as little as five hours

every two to three weeks, with crunch periods around mailings and rounds of calls. We found that having a solid fundraising database for tracking gifts and donor information was extremely valuable and saved a lot of time.

The Seeds of Hope Campaign has proven to be a tremendous prospecting tool. Working from their own personal relationships, our donors have opened the doors to new communities and networks throughout the country. When we approach these prospects for their second gift we are in part relying on the fact that the initial ask often came from a trusted friend or co-worker. In this way, a level of credibility has been established for our work. The campaign has provided us with a pool of "hot" prospects to approach for second, third, and continued gifts.

As we had hoped, perhaps the most powerful gain has been solidifying and personalizing our relationship with each donor who committed to being a Seed of Hope along with the transformation that each of them underwent as they became grassroots fundraisers for SHARE's work. Now members of the SHARE family, current Seeds of Hope and graduated Seeds as well reveal a new level of commitment to the work as donors and as grassroots fundraisers. It's a fantasy come true! **GFJ**

MELISSA BANGS IS THE DEVELOPMENT DIRECTOR OF THE SHARE FOUNDATION: BUILDING A NEW EL SALVADOR TODAY. SHE CAN BE REACHED AT MELISSA@SHARE-ELSALVADOR.ORG.

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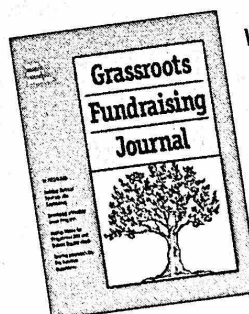
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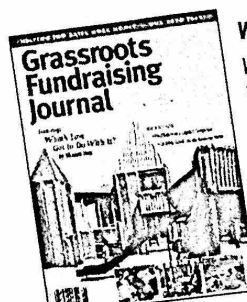
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# THE COMMUNITY RAP: 10 IN 60

## A PRESENTATION TOOL FOR COMMUNITY LEADERS

BY JENNIFER HENDERSON

**C**ommunity organizations have learned the power of voice—the ability to create persuasive images with the spoken word. It is often a bold statement of the obvious or a spectacular turn of a phrase that rallies a community to action that will lead to change. We know an effective speaker when we hear one: well informed, well organized and brief!

Because attention spans have shortened so much over the past two decades, the presentation of difficult or complex issues can pose a real challenge even to the most gifted speaker. Several factors are responsible for this short attention span: the remote control (Don't like it? Click it!); the delete key on the computer keypad (Don't like it? Delete it!); and most important, the threat of violence (Feel threatened? Act fast!). These factors have created an environment where each of us is less likely to extend our time and attention to speakers unless their message is compelling, clear, and crisp.

But our communities and organizations are complex! Is it really possible to communicate effectively about our work or issues in a short time, like a minute? The answer is yes! With practice and an innovative tool—The Community Rap: 10 in 60—boards, staff, and leaders of community organizations can become effective, confident presenters.

### CREATING SHARPER PRESENTATION SKILLS

The Community Rap: 10 in 60 is a dynamic tool for ensuring the accuracy and sharpening the presentation skills of community leaders. It can also help community leaders increase their confidence in presenting the work of their organization to prospective donors and developing talking points for issue and policy campaigns.

The tool is built around three elements: the organization list of 10, the issue list of 10, and attitude. The lists

of 10, presented below, are 10 pieces of information that all leaders should be able to communicate about their organization, and 10 pieces of information that leaders should be able to communicate about an issue. The goal is to present the 10 key points about the organization or issue in 60 seconds—with attitude!

The Community Rap provides attitude. It has six components for communicating a memorable message effectively and creatively. Here are the six components of the Community Rap:

**The HOOK:** A memorable beginning that immediately captures the attention and interest of the audience.

**The FACE:** One or more people who are or will be affected by the issue.

**The CONNECT:** How the issue connects to the self-interest of the audience.

**The STATS:** One stunning, unforgettable statistic or number connected to the issue.

**The FLEX:** Options the audience may select as responses or actions to the issue.

**The CRUNCH:** A clear request for commitment to action by the audience including a timeframe for the action.

### THE ORGANIZATION 10 IN 60

1. Your name and position with the organization
2. Name and age of the organization
3. Mission of the organization
4. Primary constituency or membership of the organization
5. Geographic focus of the organization
6. Priority issue(s) of the organization
7. Budget of the organization

8. The name of one of the organization's funders
9. One of the organization's greatest current challenges
10. An example of the organization at its best

## THE ISSUE 10 IN 60

1. Your name and position with the organization
2. Name of the organization
3. Mission of the organization
4. Primary constituency or membership of the organization
5. Geographic focus of the organization
6. Priority issue(s) of the organization
7. Example of the organization's success or impact on that issue(s)
8. The current issue of the organization
9. Who is affected by the issue and how
10. What action is being requested and by when

## HOW TO USE THE COMMUNITY RAP: 10 IN 60

The Community Rap: 10 in 60 is a tool best used by people organized into teams. The number of people can range from as few as three to as many as hundreds. This makes the tool appropriate for board trainings as well as larger community gatherings. There are eight steps to using the tool.

**Step 1:** Ask all participants who have a watch with a second hand to stand. Then ask the remaining participants to stand next to someone already standing.

**Step 2:** Announce that teams have been formed. The team member with the watch becomes the *coach*. The team member(s) without the watch become the *presenter(s)*. There can be a single presenter or a group presentation.

**Step 3:** Tell the teams they have about 25 minutes to develop a 60-second presentation that captures all 10 items of either the organization or issue "10 in 60." Remind the teams they can present the 10 items in any order. Each presentation must also include the six communication components of the "Community Rap."

**Step 4:** Announce a "two minute warning" when two minutes remain for team preparation. Call time at the end of the 25-minute preparation period.

**Step 5:** Ask a team to present. Before they begin, ask for three volunteers from those who are not part of the team presenting to assist. One will be a timekeeper for the 60 seconds; the second will be a listener for the 10 pieces of information; and the third will be a listener for the six components.

**Step 6:** Ask the presenting team to indicate who their intended audience is. Once this introductory information is provided, ask the timekeeper to give the starting signal to the presenter(s).

**Step 7:** After each presentation, do the following five actions:

- Ask the timekeeper for the time the presentation took
- Ask the first listener for how many of the 10 items were presented
- Ask the second listener for how many of the six components were covered
- Ask the presenter for her or his reaction to the exercise
- Ask the audience for their feedback to the presenting team.

**Step 8:** Repeat Steps 5 to 7 until all the teams have presented. (In some cases there may not be enough time for all the teams to present.) Then debrief the entire exercise for lessons and insights.

Perfecting the Community Rap: 10 in 60 takes some time and practice. It is well worth the effort, as it will give your organization a powerful way to keep your audience's attention—and move them to action. **GF**

JENNIFER HENDERSON IS PRESIDENT AND CO-FOUNDER OF STRATEGIC INTERVENTIONS, AN INTERNATIONAL CONSULTING FIRM WORKING IN TRAINING, MANAGEMENT, DEVELOPMENT, ORGANIZATIONAL DESIGN, RESEARCH, AND STRATEGIC PLANNING. YOU CAN FIND THEIR WORK AT [WWW.STRATEGICINTERVENTIONSBYDESIGN.COM](http://WWW.STRATEGICINTERVENTIONSBYDESIGN.COM).

## Cómo Recaudar Fondos en su Comunidad

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



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# Is an Endowment for Us?

BY CHRISTINE GRAHAM

Of course an endowment is for you, and for every organization! The sense of freedom and stability offered by an endowment is irresistible to any nonprofit. But is it realistic to think you can raise endowment funds *now*? That is the question so many nonprofits have started asking over the past couple of years, when we basked in the luxury of increased giving, good economic times, a strong stock market, and people talking about the "wave of wealth" that will sweep over us like a tsunami as baby boomers' parents leave large estates.

Today, as we face the realities of a nervous economy, we can almost hear the belts tightening and a whispering hush when the word endowment comes up. This is not a surprise. An endowment is traditionally viewed as a luxury. Imagine a young family starting out in life and starting a savings account. It's pretty hard to put away money for a rainy day when *every* day looks threatening; no family invests heavily in their savings until they've provided for the basics of food, comfort, and home. An endowment is the equivalent of a savings account for a nonprofit. Once established, it can generate much-needed operating funds through its earnings, but to build the endowment initially requires more sacrifice than most groups can afford.

Endowment funding has always been hard to raise because it requires everyone, donors and recipients, to think more about the future than we do about the present. That is simply not human nature. In addition, the organizations that need an endowment most are often the ones that are looking strenuously for any promising source of operating funds. Many of these are small, young, or don't have long-established annual funds. Yet those are the same organizations that have the hardest time raising endowment funds. (One could probably develop a mathematical formula demonstrating how much easier it is to raise an endowment for every iota less urgent having it seems.) Also, it takes an awfully large endowment to make a significant dent in current budgets.

Donors are also reluctant to give to endowment funds during harder financial times. They may no longer be setting aside significant personal savings, so giving to a

nonprofit's savings account may seem counterintuitive. Many donors are extremely generous, but very few of them give to nonprofits before they've taken care of their own family's needs.

From the organization's point of view, in harder times annual funds may become more urgently needed while harder to raise. Truthfully, an endowment is not going to resolve an urgent situation. It is not going to relieve you of ongoing annual fundraising challenges or erase the need for a capital campaign. Unless very, very large, an endowment is not going to take the worry out of your budget.

Still, having an endowment seems irresistible. Before we all jump on the bandwagon, however, we need to consider it very carefully. Can we afford to invest that much of our current time and energy in something that, if it works, may not significantly help us very soon?

The following questions are often asked by first-time endowment seekers. As you wonder if you should be doing something more toward establishing an endowment, consider the following thoughts.

## WHY DOES AN ORGANIZATION NEED AN ENDOWMENT?

When you are ready to plan for the future, and you know that you probably *have* a future, you are ready for an endowment. But raising funds for an endowment and receiving income from it are two different things. You have to keep in mind that an endowment only generates a small percentage of its total in income for operating use: financial committees and advisors usually recommend 5% as the optimum drawn from the endowment. You need to be in a secure enough position with fundraising for current expenses that you can afford to draw this minimal amount so the endowment can grow over time and be as useful years from now as it is today.

One of the biggest questions for any organization is whether or not to devote fundraising time to seeking endowment funds. There is always the chance that some wonderful surprise gift will come along and you could



put that into an endowment and just call yourselves lucky. But a serious and deliberate effort to raise an endowment takes a great deal of time and effort, and also requires that you ask your donors to focus on the long term. You have to be in secure financial condition to have the luxury of doing that.

It is also essential that you are offering a great program if you want to raise an endowment. If you are not meeting your mission, if you are struggling to keep your members happy, if you are having trouble delivering a quality product, you should put your energies into improving the organization here and now. Endowment is a gift forever. You have to have a program that is worth keeping forever.

Whether or not you decide to initiate an endowment campaign, you certainly can prepare to receive "lucky" endowment gifts by establishing a few simple policies. These might include:

- Any bequest or unanticipated windfall will be invested in an endowment.
- The endowment will be professionally managed for moderate (low-risk) growth according to the decisions of the finance committee.
- No more than 5% of the endowment asset will be drawn each year for support of operations. The organization will probably want some reliable draw in order to budget, and over time the income earned should average more than the amount of your draw. This policy would allow a small draw from principal in the occasional years when income earnings dropped below 5%.

The board may also choose to set up two different types of endowment funds: "Pure" endowment whose capital investments can never be spent and is used only to generate income. "Quasi" endowment funds, more like a savings account, that may be used as organizational collateral, an internal loan, or for other long-term purposes at the discretion of the board. Most organizations that have such a "quasi" endowment fund fully intend to repay it if they use it, but the circumstances that cause it to be used often preclude repayment.

## WHEN IS THE RIGHT TIME TO START AN ENDOWMENT?

If you have the policies suggested above in place, and any others you think would be helpful in guiding the organization concerning endowment funding, you may start an endowment whenever someone makes a bequest or unanticipated gift. But in most circumstances, organizations start an endowment at one of these points in their lives:

- When a new building is purchased or built, and fundraising can include an endowment component
- During a capital campaign that includes a variety of projects
- When a special drive is established to honor a person or accomplishment
- When the money is there, the organization is riding a crest of accomplishment, and donors want to secure the future of the organization

Probably the only bad time to establish and fundraise for an endowment is when the organization is in financial stress and needs to fund its operating budget. Even if you could convince donors to make endowment gifts at that point, the return would probably be too small to get you back in stable financial condition fast enough.

## HOW DO WE SET A GOAL FOR THE ENDOWMENT?

From the planning distance, it seems that the more endowment, the better. But it is possible to have too much tied up in endowment, just as it is possible to have too little to make a difference. There is probably no "right amount" of money that an organization should seek for an endowment, as it's unlikely that any size endowment would be able to cover a group's annual costs from its earnings. So setting the goal is more a matter of creating a motivational target than of getting the right amount of money. In a capital campaign for a building, your endowment goal will probably be set at some reasonable percentage of the campaign, which will also generate a significant enough amount to offset operations or maintenance costs for that building.

For instance, if you are running a \$2 million campaign for a new building and you anticipate that the increased operations costs to run that building will be \$125,000 per year, you might want to raise enough in endowment funds to generate that \$125,000 annually. But at a 5% draw rate, you'd have to have \$2,500,000 in endowment to accomplish that. Would your donors really give a total of \$4.5 million in order to help you get that building? You can test that in your feasibility study; perhaps they will, but it's more likely they'll see a \$1 million endowment on top of \$2 million for the building as reasonable. So you can set your campaign goal at \$3 million, with an endowment goal of \$1 million within the campaign. Some day in the future, you can try to raise the remaining \$1.5 million for the endowment. If you go over goal, of course, you can put more into the endowment.

Such figuring is always influenced by non-financial issues. For instance, the older and more established the

organization, the more likely your donors would be to support an endowment approaching the actual need. For a young organization raising funds for a \$2 million building, the \$1 million endowment might be a challenge, whereas a century-old, beloved community organization might be able to raise the full \$2.5 million desired for endowment. It is an irony of fundraising, of course, that the older and more established organization probably has more ways to raise operating costs than the young, struggling organization, but can also raise the endowment more easily. The same goes for highly controversial organizations, those in financial difficulties, and so on. The characteristics that make operations fundraising difficult for these groups are going to provide endowment challenges.

The real secret here is that your endowment will never be complete; you only need the goals to motivate solicitors and donors at various points in time. Your goal will have to factor in need, ability to raise funds, motivation, and other demands on your income.

## WHAT ARE THE WAYS TO RAISE AN ENDOWMENT?

As mentioned above, a capital campaign drive is a great way to raise endowment funds. Not only do you have a tangible goal to work toward, but your donors can see that building, program, and endowment are carefully interwoven to create a productive, stable organization with a strong future.

But you can also be working on raising endowment funds over the long term, as an underlying foundation of all your future-building work. This is not the kind of fundraising that you do within the context of a single annual fund drive. It is the long-term, relationship-based fundraising that you achieve with your most devoted donors. Many organizations tie their endowment efforts to planned giving, because large endowment gifts more often come through estate planning and bequest planning than through current income gifts (see the next article in this issue).

Unless you have such a strong annual drive that you can afford to be obsessed with seeking endowment money, your organization would probably be wise to develop several ongoing efforts that can be implemented by the organization, such as the following:

- Create the policies for raising and managing an endowment mentioned above.
- Include discussion (incidental at least) of the future, and mention endowment, in every major gift solicitation.
- Feature news about endowment gifts and the uses of endowment income in each publication year round.

- Create a small pamphlet about the future of your organization and leave it with people when you visit, send it to major donors from time to time, offer it at performances or other events, and include notices of its availability in your newsletters.
- Include a check-off on your donor reply envelopes that says, "Yes, I'd like to know about gifts that preserve the future of the organization."
- In a strong fundraising year, offer some annual donors the option of restricting their gift to a preexisting endowment. You might carefully suggest this to long-time donors who might be thinking about planned giving, to get them started. Only do this if you can afford to give up the operations money!
- Educate yourselves about planned giving vehicles and find a specialist who can be available in case the opportunity arises to solicit or negotiate a trust or bequest.

## HOW MUCH OF MY TIME SHOULD BE SPENT ON RAISING ENDOWMENT MONEY?

Very few organizations, especially young, small, grass-roots organizations, have the luxury of spending large percentages of staff time on raising endowment funds. Annual needs are too pressing. If your organization is in terrific shape for operations, by all means devote a large percentage of your time to raising an endowment. If you are doing a capital campaign, absolutely include an endowment component.

But if you are like most organizations, hoping for a good year and working like the devil to assure it, you should design a long-term plan for your time investment. Educate yourself and do some of the simple, less time-consuming things mentioned above. Find a board member or two who might be endowment donors and who might help you create this plan and start talking to donors about endowment.

Most important, build strong relationships with the donors who care the most about your organization. All good fundraising is built around people and relationships, and endowment projects as much or more so than anything else. An endowment gift is a permanent gift for the future; it requires a donor who is totally committed to the organization. If you build great donor relationships and if you run a wonderful organization that serves its mission well, you will eventually have a great endowment. **BT**

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# Let's Talk About *Planned Giving*

BY BYRON JOHNSON

**M**uch has been written about planned giving: establishing a program, marketing it, identifying potential planned givers, and so forth. But not much has been said about the nitty gritty of planned giving: raising the topic with your donors, becoming comfortable talking about money and death in the same sentence, and what a typical conversation with a planned giving prospect is like. In this article, I will attempt to shed some light on this crucial interaction.

Planned gifts are just that: gifts that require a lot of planning, both by the donor and by the organization wishing to receive these kinds of gifts. The donor will have a variety of personal and financial factors to consider when making a planned gift; the organization will also have many factors to consider when deciding to ask for and receive planned gifts.

There are three categories of planned gifts: Outright Gifts, Bequests, and Life Income Gifts. Outright Gifts include stock, tangible personal property (art works, jewels, rare books, and so on), and real estate when the organization can use the asset immediately. Bequests are gifts made through the donor's will or trust that are distributed to the organization when the person dies. Life Income Gifts are the most complicated of the three and allow the donor to make a gift to an organization during her or his lifetime while continuing to receive income from it. Of the three, bequests are by far the most common, life income both the least used and the most challenging for an organization to manage.

As you may know, we are in the midst of a great inter-

generational transfer of wealth. Simply put, this means that trillions of dollars in assets (mostly stock and real estate) are being passed from one generation to another as our parents, grandparents, aunts, and uncles leave this life.

Half of them will die without a will. Of those who have made a will, fewer than ten percent will have included a bequest to a charitable organization. Realizing the enormous potential of this situation, many organizations are not only encouraging their donors to make a will, but educating them in how they can use planned giving to benefit causes that they believe in. So should you.

*Asking  
someone for  
their input as  
you establish  
your planned  
giving program  
can lead to  
interesting  
conversations  
and ultimately  
your first  
planned gift.*

## **STARTING A PLANNED GIVING PROGRAM**

Let's say your organization doesn't have a planned giving program yet but wants to start one. First, you'll want to set up a planned giving committee. This should consist of at least three people: the development director or fundraising coordinator, at least one board member, and a volunteer. If your organization already has a fundraising or major gifts committee, this could double as a planned giving committee.

Each committee member should take it upon themselves to develop a basic understanding of planned giving concepts. If one

of them is a lawyer, financial planner, insurance agent, or accountant, all the better. But don't be dissuaded if this is not the case. Donors usually work with their own advisors when deciding what kind of planned gift to designate.

The committee's job is to develop a framework from which to work with the donor to help them match their



goals with the needs of your organization. This includes establishing gift acceptance and investment policies (see "Fundraising Medicine: Creating Gift Acceptance Policies" in *Grassroots Fundraising Journal*, Vol. 21, No. 1), adopting bequest language, and deciding which planned giving instruments to promote.

## CULTIVATING PLANNED GIFTS

How do you raise the issue of planned giving with your donors? Most donors hear about these types of gifts from the organizations that they already support, usually through mailings such as a newsletter, a brochure highlighting the benefits of making a will, or estate planning seminars organized by one or more nonprofits and given by an expert in the field.

It has been my experience that simply asking someone what they thought about a recent significant gift in your community or soliciting their input as you establish your planned giving program can lead to some interesting conversations and ultimately your first planned gift.

For example, let's say that Ms. Soandso has been a supporter of your organization for some time and you know from information you've gathered in developing your relationship with her that she is a good planned giving prospect (she's well over 50, has no children, dabbles in the stock market, and owns real estate). Call her up and ask her what she thinks about your group's plans to start a planned giving program. I'm certain that she'll have some ideas about what your organization needs to do to promote planned gifts to people like her. She may even reveal that she already has a will set up with your organization in it. Believe me, it happens!

But what if there is no Ms. Soandso involved with your organization? How do you get donors interested in making a planned gift? In addition to direct mailings and estate planning seminars, you will want to reach out to the very people that your donors talk to: their lawyers, accountants, financial planners, and insurance agents. Educate them about your organization and its mission. If you have a board member from one of these professions, perhaps they can speak at the local chapter of their organization. Or you can invite a few notable attorneys, accountants, and financial planners to an open house at which you discuss the organization's mission and desire to receive planned gifts. Be creative.

*Reach out to the very people that your donors talk to: their lawyers, accountants, financial planners, and insurance agents.*

## YOU STILL HAVE TO TALK ABOUT IT

What if, like most of us, you're uncomfortable with the idea of talking about money and death in the same sentence, especially the money and the death of the donor you're talking with? I suggest that you start by initiating this conversation with your most difficult audience—yourself.

Let's pretend that you do not have a will, but you do have some valuable assets, such as a house and a retirement account or stocks. Let's also assume that you're aware that if you do not set up a plan for these assets after your death, much of their value will go to the government in estate taxes. What would you do? Here are some questions you might ask yourself:

- What causes or charities would you support?
- What would you ask the charities that you are considering?
- If you gave a large gift to a nonprofit would you like to be anonymous? If not, how would you like your gift to be recognized?
- Would you like your gift to be restricted to a particular program?
- Would you like to set up or contribute to an endowment?
- Would you like to give a large amount of money now and receive payments from the income it generates while leaving the original donation to the organization?
- Would you want to set up a private foundation? Who would you want to run the foundation?

These are just some of the questions that people who make planned gifts must consider. And that is why planned gifts can take a lot more time and energy than most major gifts. Even after a donor has answered these kinds of questions for themselves, it can take at least a year to write up and finalize a planned gift. Some more complicated gifts take even longer than that.

Once you begin talking with donors about making planned gifts to your organization, your relationship with them changes profoundly. You will have more contact with them and learn a lot more about them. Ideally, most of your dealings with them will be face-to-face and in their home. But you may find yourself, as I have, attending their church or another cultural or community event with them. Wherever they are most comfortable hanging out with you is where you will go. This is all a part of the cultivation process.

However, while you are cultivating them for a planned gift and educating them about your organization, they

may let you know that they don't completely trust their attorney or accountant or that they are not happy with a personal or family relationship. This can be your greatest challenge in soliciting planned gifts, as once a donor decides to do some kind of planned gift, they may see you as less of a fundraiser and more of an advocate for them. This is where you must remind yourself of your role as a representative of your organization and their role as a supporter of your organization's mission.

Once, while I was working with a prospective donor who was setting up a bequest to the organization I was working for at the time, the donor would relate conversations he had had with his attorney and ask me what I thought. I did not think it appropriate to get into this "middleman" position, so I gently reminded him of my role and suggested that the three of us meet when finalizing his trust to be sure that we were

all on the same page. This approach not only made both the donor and his attorney more at ease with the situation, it actually helped complete the planned gift.

You don't have to be a lawyer or an accountant to solicit planned gifts. A basic understanding of the concepts, enthusiasm about your organization and its mission, and good listening skills are all you need to begin. And they are certainly worth the effort! Just imagine if someone left you the proceeds from the sale of their house. In the Bay Area and other high real estate markets this gift could equal a year of operating costs for many nonprofits! That's a lot of meals for an organization feeding the hungry. But, as the old saying goes, a closed mouth doesn't get fed. **GF**

*Once you begin  
talking with donors  
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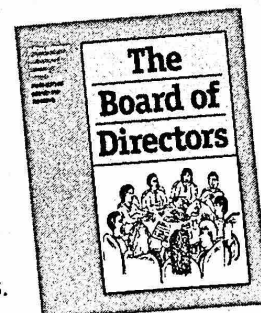
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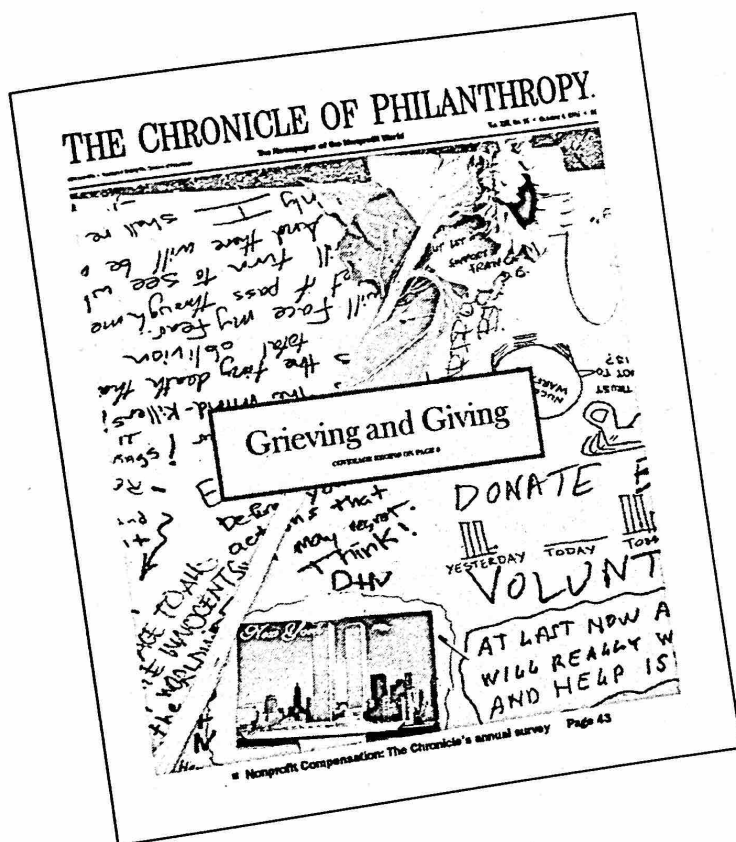
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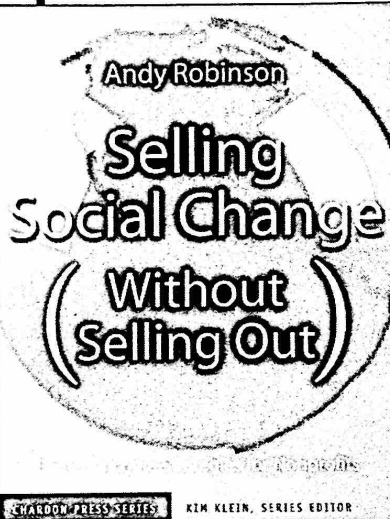
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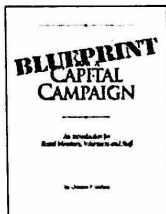
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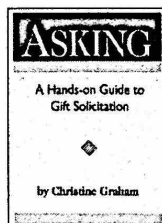
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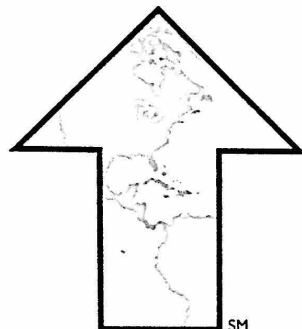


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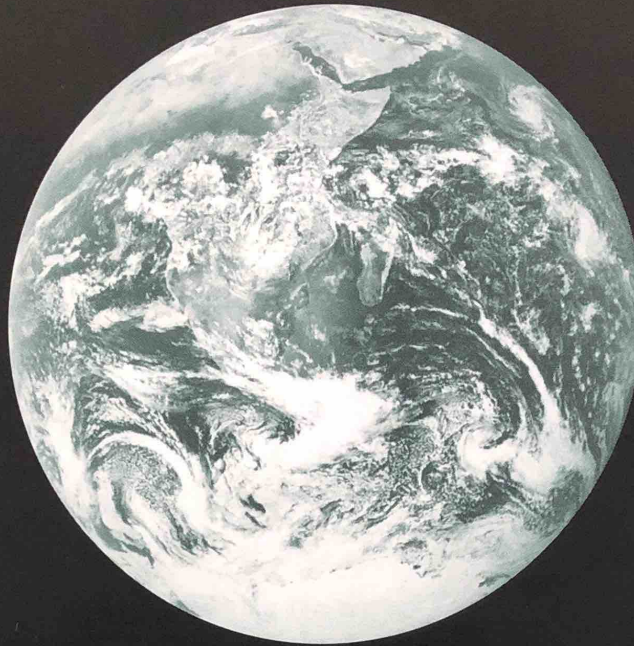
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