

FUNDRAISING IDEAS THAT WORK!

Grassroots Fundraising Journal

VOLUME 21 • NUMBER 4 • JULY/AUGUST 2002



Featuring:
**Revitalizing
Your
Membership
Program:
Why Do You
Need Members—
and Why Do They
Need You?**

BY ELLIS M.M. ROBINSON

Also in this issue:

**BUSINESS PLANNING
FOR ENTERPRISING
NONPROFITS**

**GROUPS VS. TEAMS:
A CALL AND
RESPONSE EXERCISE**

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On Our Cover BUILDING AN ARRAY OF FUNDRAISING PROGRAMS HAS HELPED THE MILWAUKEE LESBIAN GAY BISEXUAL TRANSGENDER COMMUNITY CENTER INCREASE THEIR BUDGET FROM \$40,000 TO \$440,000 OVER THREE YEARS. EXECUTIVE DIRECTOR NEIL ALBRECHT AND MEMBERS OF THE “DONOR CABINET” CELEBRATE THE RECORD SUCCESS OF THEIR MAJOR CONTRIBUTOR CAMPAIGN. (FROM TOP LEFT: NEIL ALBRECHT, DAVE BODOH, ADAN BURNETT, ITA MENO, KATHY HERBST, LEONEL MARCHAN, BRENDA COLEY.)

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Grassroots Fundraising Journal

LETTER FROM THE PUBLISHER

KIM KLEIN



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Ever since we redesigned the *Journal* last year, we have had some wonderful photos on our cover showing the work of great organizations — among them, Californians for Justice, the Center for Anti-Violence Education in Brooklyn, NY, the San Francisco Women's Building, a playground in Kauai, Hawaii built entirely by volunteers, and now the Gay and Lesbian Community Center of Milwaukee. You, too, can be on the *Journal* cover! Look for a photo that is preferably a vertical shot with high definition (that is, not fuzzy or blurry), preferably with people (or animals) who are facing the camera. Remember that we have only six covers in a year and more than 4,000 subscribers, so we can only use a few photos (I am sounding like a program officer at a foundation!). Nevertheless, we'd love to see yours. If you have an idea or a photo you would like us to consider, please e-mail Editor-in-Chief Stephanie Roth at stephanie@grassrootsfundraising.org and she'll help you go from there.

Inside the cover, this issue has another collection of excellent articles. The lead article — on revitalizing your membership program — comes from a pro in that area. Ellis Robinson has built a number of extremely successful membership programs all over the United States.

Second, we have an adaptation of a couple of chapters of the new Jossey-Bass Chardon Press Series book by Andy Robinson (no relation to Ellis), *Selling Social Change (Without Selling Out)*. According to the *New York Times*, commercial ventures are now the leading source of money for all nonprofits. The lines between profit and nonprofit are shifting in some interesting ways, as nonprofits realize that they must be more businesslike in order to survive, and for-profits realize that they must be more people-focussed in order to survive. Andy's book describes how nonprofits can think about starting and go about succeeding at businesses to create earned-income streams. You may remember Andy's other excellent book, *Grassroots Grants*, and his many contributions to the *Journal*.

Third, we bring you another thought-provoking, organization-building exercise from a very dynamic and creative consultant and trainer, Jennifer Henderson of Strategic Interventions.

And now, some organizational news. The *Journal* has joined the world of nonprofits in fact as well as in spirit by incorporating as a nonprofit, Grassroots Fundraising, Inc. You'll find us on the Web at grassrootsfundraising.org. We welcome our founding board members: Fred Goff, founder and President of DataCenter; Helen Kim, independent consultant, formerly Organizing Director for Asian Immigrant Women's Advocates (AIWA); Netsy Firestein, founder and Executive Director of The Labor Project for Working Families; and Charlie Fernandez, program officer at the Tides Foundation.

As summer is upon us, I hope you will take some significant time off — see some movies, spend time with friends, go on a picnic, celebrate the solstice. To quote the late anarchist, activist, and writer, Emma Goldman, "If I can't dance, I don't want to be in your revolution."



Grassroots Fundraising

REVITALIZING YOUR MEMBERSHIP PROGRAM:

WHY DO *you need members...* AND WHY DO *they need you?*



BY ELLIS M.M. ROBINSON

EDITOR'S NOTE: Organizations seek members for a variety of reasons. For the most part, organizations that choose to have members want them to feel some kind of ownership of the group. However, some organizations want a strong, committed group of people whose primary relationship to the organization is financial. These organizations often lose sight of the other roles members can play in programmatic or mission-fulfilling work. At the other end of the spectrum are organizations that want a strong, committed group of people whose primary relationship to the organization is their participation as activists and leaders, developing skills to make change in their communities. These organizations often miss opportunities to solicit members for financial support, or to involve them in fundraising activities. Over the years, the *Journal* has tried to help readers see that an organization that chooses to have members needs to involve them in a variety of ways — as donors, as activists, as leaders, as fundraisers, as volunteers and so on. In this article, veteran fundraiser Ellis Robinson reminds groups that there is much more to membership than money for your cause.

Members are such an integral part of many grassroots groups that their role is rarely examined. How many times have you and your board or staff colleagues discussed why you have members?

If your answer is “never” or “I don’t remember” you are not alone. Yet, by clarifying the role of members within your organization, along with your expectations of them and your promises to them, you can build their loyalty and involvement and expect greater financial stability from their support. Here are some ideas how.

MEMBERSHIP IS A PARTNERSHIP

There has been a lot of talk lately about building relationships with your donors or your customers. In fact, in the best membership programs the member and the organization share a clear, mutually beneficial view of what

the benefits of membership are to both parties.

Practically speaking, this means that everyone on your team — your board members, staff, and key volunteers — can explain why members are important to the success of your organization. Similarly, the member can identify how they fit and, just as important, how they benefit from supporting your organization.

First, from the organization’s standpoint, you need to answer the question, “Why do we need members?” Here are some possible responses:

- **Credibility:** The number of members, as well as who they are, can reinforce the validity of your group. For example, a group seeking to improve the quality of life for coastal fishing communities may count among its members people who work there, people who vacation there, and even people who have moved away but still have a

connection to the place. But the group's members must include a significant number of current residents if it is to be credible in its work.

- **Political Influence:** An advocacy group that is seeking to influence government decisions needs to include among its members individuals or sheer numbers (see below) who are considered important to the local, state, or national officials who must say "yes" if your work is to be successful.

- **Critical Mass:** How many members you need in order to be influential varies from place to place. For example, groups often complain, "We have all these members in the urban area; we really need folks in the rural part of our county." Yet, given how many more people live in the city, you would expect to have more members there than in smaller communities. The key is to look at your members proportionally. For example, "critical mass" of representation in your state's largest city might be a thousand or more members. But achieving the same visibility, credibility, and influence in the outlying agricultural community might need only 20 to 40 members.

- **Expertise:** Members can provide important information that could cost thousands of dollars for your group to purchase. Examples include educators, scientists, lawyers, or accountants who may volunteer their expertise for the group. However, important expertise can also be place-based. For example, when the Rails-to-Trails Conservancy was founded, this nationwide organization depended on its members to be its "eyes and ears" to evaluate proposed railroad abandonments in their local communities and advise on a route's appropriateness as a future trail.

- **Outreach and Validation:** Despite the ability of communications technology to spread information wide and fast, word-of-mouth endorsements are still the most powerful. Having a friend, colleague, or relative tell a prospect, "I'm familiar with that group, I trust them, and I joined because they are working on issues that make a difference in my life" is perhaps the most powerful and effective membership recruitment tool available.

- **Volunteer Time:** Members are often an invaluable source of person-power to help you accomplish your work. Volunteers give you services you might otherwise need to purchase. At the same time, volunteering provides members with the chance to meet people who share their values, learn more about an issue they care about, give back to the community, and more.

- **Financial Stability:** Once convinced of the worthiness of your group, members can be counted on to give consistently, often increasing their gifts over time. Moreover, members are more likely to give than foundations or corporations. Individual giving is the largest source of

support of nonprofits. The sourcebook *Giving USA*, produced each year by the American Association of Fund Raising Counsel, reported that in 2000 individuals accounted for 74.6% of all funds donated to non-religious organizations. That means that only about a quarter of the monies that support charities come from foundations or corporations. In addition, unlike corporate or foundation grants, gifts from individuals can usually be given quickly and repeatedly. Furthermore, members are your most likely source of major donations and bequests.

WHAT MOVES A PERSON TO JOIN?

There is a reason that I put "financial stability" last in the above list. Consider your personal checkbook for a moment. Are you at a loss for what to spend your hard-earned money on? Do you carry a large balance at the end of every month because you just don't have anything rewarding to buy?

If you are like most of us, the answer is an emphatic "No!" Instead, like most of us, you are probably juggling too many required payments with too little income — and a long list of things you would like to spend money on when you end up with a little left over at the end of the paycheck.

So, as discouraging as it may sound, the reality is that few folks are contributing to your organization now (or might be inspired to contribute to you in the future) because they are looking for someplace to donate. Rather, your most loyal and generous supporters are investing in you because your organization offers them a way to fulfill a specific need or goal in their life.

Your goal is to figure out why they care about your work. What makes membership in your organization compelling and rewarding? First, let's look at how a prospect (someone who is not yet a member of your organization, but you think should be) makes the decision to become a member.

The decision ladder, "Moving from Prospect to Member" (see sidebar on page 6), illustrates the steps a prospect usually goes through before making the decision to join. Starting from the bottom, here's how it works:

1. **Your prospect must personally perceive a need that your group can fulfill.** This is pretty basic. The most likely people to support the local animal clinic, for example, are those who agree that having healthier cats, dogs, and other animals is important and will in some way benefit the potential member's life. It's also important that the prospect agree that meeting this need is probably not something the prospect can accomplish alone. Part of advancing from this first step to the action of joining a group is acknowledging that this life goal can best

Moving from Prospect to Member: A Decision Ladder

7

OPPORTUNITY

I have a convenient way to join now.

6

PERCEIVED URGENCY

I must take action now!

5

BELIEVABILITY

I understand and share your organization's objectives and agree that they can be accomplished.

4

CREDIBILITY

I perceive that your organization has the history, leadership, and other credentials needed to be accountable. I trust you to do good work.

3

COMMON VALUES

Your organization is made up of or otherwise relates to "people like me." I feel we are on the same wavelength; we have enough common ground to consider a relationship.

2

FAMILIARITY

I've heard of your organization before.

1

PERCEIVED NEED

This issue affects my life.
My world will be a better place if this issue is acted upon.

be achieved by a group. (This is one reason that the most likely future members of your group are folks who are already members of other groups. They already believe — and have seen it to be true — that more effective change can be made by working together than by operating alone.)

2. *Your prospect must know who you are.* This is another straightforward requirement: in order to join your group, the prospect has to be familiar with you. Though this sounds relatively simple, the competition is stiff for your prospect's attention. Estimates are that *the average American is subjected to more than 3,000 marketing messages a day!* So, if your organization has a name that is confusing, is known by several different names, or otherwise is not clear in its identification, now is the time to choose one strong way to refer to your group and use it consistently. Do not use initials! Only after decades of use and tens of millions of marketing dollars, did IBM and AT&T change

their names to initials. When you are that old and have spent that much money making sure your members and prospects know who you are, you can use abbreviations, too — but not before.

3. *Your prospect must feel like "one of the gang."* One of the strengths of membership is its offer of community. Before making the decision to join, your prospect must be convinced that she is among people who share her values; that she is going to fit in. You can accomplish this in many ways: if you embrace people of all ages, make sure your promotional materials include pictures of young, old, and in-between. If you are trying to appeal statewide, make sure you highlight activities in several communities. If you anticipate a barrier, address it right up front. For example, the Bicycle Alliance of Washington didn't want prospects to think that only experienced cyclist could be members. So they listed their board members down the left side of their new-member appeal letter and identified them by their biking habits: "daily commuter," "weekend rider," "lives and breathes cycling," and even "new parent, riding less." Just about anyone who enjoyed any kind of bicycling could find a compatriot in this group and see that the group had fun, too.

4. *You must be a credible organization.* You are asking your prospect to invest money, time, and trust in your organization. You owe it to him to demonstrate that you are accountable and reliable. Ways to do this include listing past accomplishments, documenting your history ("Founded in 1976"), using a street address instead of a post office box, referring folks to your Web site for more information (including financial data). Here is another place where listing your board or advisory committee can be helpful, especially if your list includes known and trusted leaders of your community.

5. *Your goals must be believable.* This is sometimes a tricky balance. The excitement and energy that is created around a BHAG (Big Hairy Audacious Goal) can often be attractive but, frankly, not very believable if your prospect doesn't know much about your group. How to climb past this step in the ladder? Cite past similar successes. Or break your big goal down into understandable steps — show you have a strategy that will work. Also, be forthright about factors that might make a prospect nervous. For example, when Northwest Ecosystem Alliance pledged to raise \$14 million to protect lynx habitat in Washington's Loomis State Forest, they had never raised a budget of even \$500,000! So, they broke the goal into bite-sized pieces (\$50 protects one-tenth of an acre) and got a commitment from the landowner up front that they could protect as much land as they could raise money for, even if they didn't reach their entire goal. (They reached their goal and

more by attracting more than 5,000 new members to support the campaign.) You know what aspect of your work keeps you up nights. Your prospects are savvy, too. Let them know that you have thought about the potential stumbling blocks and have a way to address them.

6. Tell the prospect why action is needed now! With those 3000+ marketing messages spinning past your prospect everyday, you want to make sure that, when you get his attention, he is compelled to act now and not put your request in the pile of things to do later. Make sure your prospect knows why his joining now will make a difference. Perhaps the state legislature is going to be considering a key bill soon and his voice will count. A food bank or homeless shelter might be stocking up for the winter season. The PTA or Friends of the Library is preparing for the new school year. Tell the prospect why his membership now will make a difference — and invite him to take an action (sign a petition, volunteer as a mentor, come for a hike along a threatened river) as well as sending a gift.

7. Make it easy for the prospect to respond. The more ways you can make it possible for that prospect to join, the more likely it is to happen. Provide a return envelope in your mailing. List your Web site and e-mail address. Use a toll-free phone number (and make sure there is a way for folks to leave messages ... and that someone in-house picks them up every day!). Take credit cards and invite faxed-back responses. Include a remit envelope in your own newsletters so that when the word-of-mouth “advertisement” happens — when a friend stops by a member’s house to pick up the kids for soccer and leafs through your newsletter — the prospect can respond easily.

WIIFM: WHAT’S IN IT FOR THE MEMBER?

Now you know why your organization wants members and what steps a prospect must go through to make the decision to join your group. How do you figure out what those magic words are that will motivate your prospects to join?

Here comes the great news: All you have to do is ask the folks who have already made that decision to tell you what motivated them.

If you have not already conducted a membership survey, put one in your work plan now. This can be as complicated as mailing a questionnaire to each of your existing and past members, or as simple as calling twenty-five of your members and asking them three or four questions. The primary purpose of this questionnaire is to understand the “whys,” which means you will collect qualitative information, not quantitative information. At a minimum consider asking the following:

- Why did you join our group?

- Which of our programs are most important to you and why?
- Would you recommend membership in our organization to a friend or colleague — and why?

Depending on your abilities to tabulate and analyze your returns, you might like to ask additional questions about lifestyle and demographics. Keep the number of questions relatively small; test the survey yourself and let people know how long it will take to fill out. Also, tell your members how their participation will help. For example, “Please take ten minutes now to complete and return this member survey. Your responses will help us better understand your priorities and concerns, as well as assist our outreach to the greater community. Please mail, fax, or e-mail your completed survey by [date]. Thank you.”

The responses you receive to your survey will help you understand, in your members’ own words, why the work you do makes a difference in their lives. In addition to being a great morale booster to you and your colleagues (after all, your members love your work so much that they send you money to do it!), the answers you get will provide a treasure-trove of quotes and phrases that explain how your members talk about your work.

By adopting those same words and priorities in your communications, you reinforce the values and culture that your organization has already established (thereby keeping the members you have today) and make your group more credible and compelling to new prospects, helping them climb that ladder to joining.

NEXT STEPS:

If you are interested in revitalizing your existing membership program or creating a new one, take the following key steps to establish a membership strategy that will assure success:

1. Define why your organization needs members. Consider your program goals and objectives, as well as timing. Who do you need to help you achieve success, and when do you need them? Begin this discussion within your staff. Then bring your recommendations to your board for reflection and consensus.

2. Conduct a membership survey. Now that you have your organizational perspective on membership, find out from your existing members why you make a difference in their lives. (If you are just starting up and don’t already have members, ask your founding supporters and donors.) Give each of your staff members (and/or board members) a short stack of completed surveys to review before your discussion to give them a personal overview of members’ opinions.

3. **Agree on the key reasons people join your group and list members' perceived benefits.** Focus on the words your members use to talk about your goals and accomplishments. For example, "providing clean, affordable housing" and "making sure all citizens have a safe place to live and raise a family" are both ways of describing the goals of a transitional housing organization, but the emotions and values that these phrases communicate are very different.

4. **Identify your key prospects and what makes "critical mass."** Who do you need as members to make your goals possible? Where do they live? What do you want them to do? Whom do they influence? When do you need them?

5. **Create your "elevator statement."** Imagine you enter an elevator at the first floor, heading to the tenth floor. At floor two, one of your key prospects steps into the elevator with you. You have eight floors — about 45 seconds

— to move him from prospect to member. Your elevator statement is an encapsulation of all the above discussions that can be used by everyone involved with your organization to send that compelling, credible, effective message that will inspire your prospect to do the right thing and join your organization. Sell that BHAG of yours with the prospect's interest in mind and you will start that prospect on the ladder to becoming your next member.

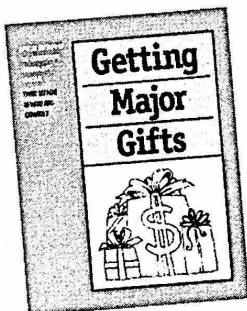
You now have in hand the basic research and strategic priorities needed to develop a successful membership plan and program. Look for more membership tips in a future issue of the *Journal*. **GF**

ELLIS M.M. ROBINSON, PRESIDENT OF THE BUTTONWOOD PARTNERSHIP, PROVIDES TRAININGS AND CONSULTING ON MEMBERSHIP FROM HER OFFICE IN SANIBEL, FLORIDA. TO SUBSCRIBE TO ELLIS'S MEMBERSHIP E-NEWSLETTER, CONTACT HER AT ELLISROBS@AOL.COM.

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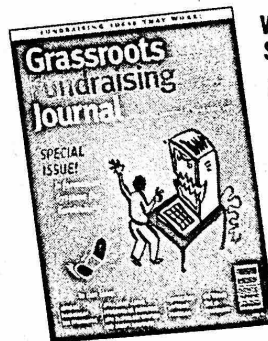


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Groups vs. Teams

A Call-and-Response Exercise

BY JENNIFER HENDERSON

Turning your board from a group of individuals into a strong team working together will show successes in many areas, including their ability to raise more money. Achieving a board team occurs when the individual talents of each board member are blended with the talents of the others to achieve the organization's mission.

Sound easy? Maybe not. Many board members are elected as individuals (rather than as part of a slate) and continue to operate as a group of individuals. Though a board may begin as individuals, a transformation occurs when it becomes a team and shifts the focus from "I" to "We" and from self-interest to the common interest. There are instances where a catastrophic event has caused the transition from group to team. But most such transformations are the result of intentional, deliberate, and continuous hard work.

A critical step in moving from being a group to becoming a team is recognizing the difference between group behavior and team behavior. Until the comparison is done, groups may believe that they have actually achieved team status.

A board can become a team when the following occur:

- The board establishes a shared vision — agreement on the long-term goal of the team's effort. The team works together towards a vision that has the commitment of each board member.
- The board can expand each member's self-interest into the team's mutual interest, establishing a sense of linked destiny. The team recognizes that the effort of each board member affects the destiny of the board team.
- The board develops an agreed plan of action with established roles for each board member to play — a unified game plan. The team brings its collective energy to accomplishing the whole plan.

Boards often are surprised that they must be more purposeful about all aspects of the board's work to truly become teams. The Call-and-Response Exercise presented here can assist boards to understand the difference between groups and teams.

CONTRASTING GROUPS VS. TEAMS: A CALL AND RESPONSE EXERCISE

Instructions: This exercise is a little more organized if done with a facilitator, but the board chair can lead the group through the steps of the exercise and also participate. The exercise involves two "reading ensembles" doing a "call-and-response" type of interaction. Make enough copies of the next page, "Developing Individual Talent and Skills Into a Strong Board Team — Contrasting Groups with Teams," so that each participant has one.

The reading ensembles may initially have difficulty reading in unison. Do not panic! Part of the learning from this exercise is to learn how to develop a collaborative reading style, speed, and even inflection. The process by which each reading ensemble finally achieved its level of collaboration is part of the debriefing process at the end of the exercise.

Step 1: Participants divide into two fairly equal "reading ensembles."

Step 2: One reading ensemble chooses to read the part of "groups," the other that of "teams" on the sheet, "Developing Individual Talent and Skills Into a Strong Board Team — Contrasting Groups with Teams."

Step 3: In unison, the "group" participants start each of their readings by saying, "In groups...." The "teams" participants respond by saying, "But in teams,"

Note: Once the reading ensembles get into the swing of the "call and response," there is a natural tendency to want to stop and discuss each of the statements. It is important to complete all twelve verses before the actual debriefing begins.

Step 4: Debrief the exercise around three questions:

- a) What was the participants' reaction to the contrast drawn between groups and teams?
- b) What was the experience of each reading ensemble in reaching their final level of collaboration reading the text?
- c) What strategies can we think of for using the exercise with our organization?

Let the bonding and celebrations of those strategies close the exercise.

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.

Developing Individual Talent and Skills Into a Strong Board Team—Contrasting Groups with Teams

GROUPS	TEAMS
1. The composition of the group changes from meeting to meeting—often without forethought.	1. The composition is planned and is set.
2. Members of groups are encouraged to take on jobs/positions/tasks even if they are unprepared or not skilled in that area—and everybody knows it!	2. People are recruited, groomed, and trained for specific jobs that match their interests and the needs of the team.
3. People move in and out of jobs based on their inability to say no when asked. Often, after accepting the job, little or no training or support is given by the group.	3. Each job has a specific set of skills. People with those skills or the ability to acquire them are recruited for the job.
4. Leadership is often one-person deep with the group highly dependent upon a handful of people.	4. Teams have rookies and understudies who learn from those who are accomplished. They are preparing for the day they will lead.
5. When people either do not perform well or fail to perform at all, the group rarely acknowledges the failure.	5. When people do not perform well, the team suffers. The team has ways of assisting the person or has systems for building the person's skills or moving her/him to another position.
6. Groups often resist planning and use planning as corrective rather than pro-active/preventive strategies. Planning is mostly done by a few people.	6. The planning by teams is called practice, run-throughs, or rehearsals. No matter how talented the team member, everyone plans.
7. Groups rarely create routine operations.	7. Teams have rituals, routines, and ceremonies that everyone learns and shares.
8. Groups usually do not celebrate or debrief victories or defeats.	8. Teams regularly review performance. Often, teams prepare for the next piece of work based on the evaluation of the last piece of work.
9. Groups rarely assess their progress in achieving their stated goals and/or objectives to chart and measure their work.	9. Teams know at most times how they are doing—if they are winning, scoring, moving towards their stated goals.
10. Groups may or may not celebrate the accomplishments of past leadership.	10. Teams often establish "Halls of Fame," retire an honored jersey. Those who have performed are held in high esteem.
11. Members of groups are often hard to identify. There is rarely anything linking them to the group.	11. Members of teams are easily recognizable. There are usually colors, logos, T-shirts and most important, common slang, songs, language, and history to link them to each other and the team.
12. Groups often are inconsistent in what time things start and end—especially meetings!	12. Time is important to teams. Most events have specific starting and ending times. Teams are often judged by what they can accomplish within a certain time frame.
13. Groups sometimes operate without thinking about their constituency.	13. Teams understand how important it is to consider the fans, the audience, everyone affected by the game. Teams know and respect the game's many stakeholders.
14. Groups sometimes fail to develop a sense of "team spirit." They assume everyone understands and works together.	14. Teams build team spirit into their plans and make sure to affirm and celebrate the work they accomplish together.

BUSINESS PLANNING *for* ENTERPRISING NONPROFITS

BY ANDY ROBINSON

EDITOR'S NOTE: Earned income — from thrift stores and farmers markets to employment training and ecotourism — now accounts for 54% of the total income of nonprofits in the United States. This article is adapted from the latest book in the Chardon Press Series, *Selling Social Change (Without Selling Out)*, by Andy Robinson. The book presents the tools to evaluate whether your group is ready to undertake an earned income venture and details how to plan and carry out a business. This article concerns the early and critical steps for a nonprofit starting a business: assigning responsibility and planning.

Given the usual state of grassroots groups — overworked, underpaid, carrying the fate of the world on their collective shoulders — it's a wonder that earned income projects are launched at all. Faced with the daily crises, who has time to plan, finance, and run a business?

Everyone who has ever written, taught, spoken, trained, or thought seriously about this subject has come to the same conclusion: for the business to function, someone has to take responsibility. Organizations that stumble into sales reach a similar conclusion through trial and error. It's simple. You cannot manage a business off the corner of somebody's desk. You cannot run a successful venture when product development, financing, management, marketing, and customer service are shoe-horned into someone's overflowing job description. It doesn't work. To be effective, you need a leader.

THE ENTERPRISE ADVOCATE

The person who assumes responsibility for the business might be called the "enterprise advocate." This role is not defined by the number of hours assigned, although in most cases this person will invest a lot of time. In addition to business skills, the job requires focus, commitment, and a willingness to take charge of the venture. Like an able community organizer, the enterprise advocate must have a knack for getting other people to help. She lines up her allies within the organization and beyond. At staff meetings, board meetings, and other venues where decisions are made, she advocates for the needs and interests of the venture. Even if she has other job responsibilities, she's always thinking about the business, and a substantial portion of her workday is dedicated to managing the

business. She keeps pen, paper, and flashlight near her pillow to capture that crucial marketing idea when it arrives in the middle of the night.

Every organization profiled in *Selling Social Change (Without Selling Out)* includes an entrepreneur on staff or board, and many groups have different people in charge of different earned income projects. However, no one has the title "enterprise advocate." Their job titles are executive director, distribution manager, development director, bookstore manager, board member, "the guy who handles marketing and distribution," president, associate director, communications director, fundraising committee chair, tour director, and — my personal favorite — farmer. They all share one trait: when they look at the world, they see opportunities for earning income.

THE VENTURE COMMITTEE, THE BOARD, AND THE STAFF

To build an entrepreneurial organization, you'll need a "brain trust" or venture committee to help brainstorm, plan, implement, manage, and evaluate your ventures. Ideally, this team should include a couple of staff members (including the enterprise advocate or business manager), a few board members, and perhaps a sympathetic businessperson from the community. You might also include a member or client who is also a prospective customer.

Board members participating on this committee play a crucial role because they carry the entrepreneurial message back to the full board. When they arrive, they are bound to meet resistance. Boards are designed to provide detached oversight. The inspired idea that carried the ven-

ture committee into fantasies of wealth and well-being might not survive a stiff cross-examination from the board. This is a good thing, as many marginal ideas will be screened out. However, if the board stonewalls from the beginning — “We’ve never done things that way,” or “Running a business will compromise our integrity,” or “What do you mean, charge people for our services?” — you’ll probably need a new board.

Engaging and involving staff members raises a different but related set of challenges. Many activists, organizers, social workers, artists, troublemakers, and nonconformists — the kinds of folks who are attracted to social change work — are suspicious of business and anything that smells like business. Some joined nonprofits after becoming fed up with the corporate world. Others are escaping bad experiences in retail sales. Still others distrust capitalism for a variety of legitimate reasons. If they don’t embrace commerce as an important part of your work, chaos will ensue.

Bringing the staff around involves several strategies, best used in combination.

- **Put them on the venture committee.** Participating staff members fill two crucial roles. First, they have the most knowledge about programs and day-to-day operations, so can best judge barriers and opportunities. Second, their enthusiasm will help allay the suspicions and concerns of other staff members.

- **Emphasize the ways that earned income can increase your organization’s independence.** When staff positions are underwritten through grants, those jobs are at risk. If the group can become more self-sufficient, everyone benefits.

- **Explore a salary structure that includes incentives and bonuses based on business performance.** Earned income can also underwrite extra benefits for all staff, including professional training, tuition for further education, travel, mental health days, sabbaticals, and pensions.

- **Create a flexible workplace.** Bureaucracy is the enemy of innovation and, by extension, the death of enterprise. Business managers require a certain amount of freedom to try new ideas and, from time to time, to stumble and fall. You may need different standards of job performance and accountability for different types of jobs. In organizations that strive to be equitable, this can generate conflict.

FINDING AND USING OUTSIDE HELP

One of the most important steps in launching an enterprise is figuring out what you don’t know. Maybe you don’t understand how to price your goods or services. Or you’d like to know if your income generation idea has been tried before. Or your accounting system needs an

Where to Look for Help

- **Your local business college.** Business professors are always looking for hands-on student projects. If you want help with brainstorming or testing venture ideas, market research, or business planning, ask a class to adopt your organization.

- **Your local nonprofit resource center.** In several hundred communities across the country, nonprofit resource centers provide training and technical assistance. Many are affiliated with the Foundation Center (800/424-9836, www.fdncenter.org) and house resource libraries. Talk with local nonprofits; if such a center is located nearby, someone will know.

- **Your local or regional community loan fund.** Community loan funds support small businesses and nonprofit ventures in economically disadvantaged communities by offering low-interest loans. Many also provide technical assistance and training for entrepreneurs. You can learn more about community loan funds through the National Community Capital Association (215/923-4754, www.communitycapital.org).

- **Local businesspeople.** You and your organization conduct business daily: you buy food, rent space, use electricity, have the copy machine repaired, and so forth. Your vendors (and other local business owners) can be drafted to serve on the venture committee or simply provide informal advice.

- **Your local economic development agency or chamber of commerce.** Most of these folks are operating at a much higher financial level than your group — trying to lure multi-million dollar employers to town — but in some cases they can provide practical suggestions.

- **Consultants.** Dozens of consultants — individuals, private firms, and nonprofits — specialize in nonprofit enterprise. Unfortunately, at this time there is no professional association or master list of practitioners, so you’ll need to ask around. Four good places to start are the National Center for Social Entrepreneurs (800/696-4066, www.socialentrepreneurs.org), the Institute for Social Entrepreneurs (952/942-7715, www.socialent.org), Community Wealth Ventures (202/478-6570, www.communitywealth.com), and the Social Entrepreneurs Alliance for Change, or SEA Change (415/291-9900, www.sea-change.org). Your local nonprofit resource center may also offer referrals.

upgrade. Perhaps the idea of writing a business plan scares the sense out of you.

Take heart, help is on the way. Solicit an outside perspective to help you see past your assumptions about who you serve and what you can offer a paying customer. On the other hand — this is important — many consultants and “outside helpers” won’t understand the culture of your organization; in some cases they won’t have

experience in the nonprofit world. You will need to educate them as much as they educate you. See the sidebar for a list of resources.

Remember, advice from an outside consultant is just that: advice. It's not a commandment or a guarantee. No amount of outside expertise can make up for a lack of internal understanding of enterprise or limited follow-through with the advice provided. For this reason, the experts recommend that you do as much planning as possible within the organization, if only to educate yourselves. Don't hire someone to write your business plan; if necessary, hire someone to teach you how to write your own.

KNOWING WHAT YOUR WORK COSTS

"Most small nonprofits," writes Nancy Haycock in *The Nonprofit Entrepreneur*, "do not have a realistic notion of what their internal costs are, and when they try to project the costs of their earned income venture, they have a lot of trouble. Often their estimates are too low. In many cases they don't include overhead or the value of their own time."

Commerce is based on a simple premise: The money you bring in must be of greater value than the time and money you spend. If we include the "second bottom line" of meeting your mission while you earn income, the equation looks something like this: The money you bring in and the mission-related benefits you create must be of greater value than the time and money you spend.

If you subsidize a failing venture with cash, you will lose money and eventually go bankrupt. If you subsidize it with time (in other words, paying people poorly and working them to death), you and your organization will crash and burn. If you don't have control of the numbers — both time and money — you can't project what it will take to break even and earn a profit. Under these circumstances, it's impossible to make a realistic plan.

Before you think seriously about starting a business, get control of the numbers. If you need help with accounting and time management systems, see the resources listed under "Where to look for help."

DEVELOPING A BUSINESS PLAN FOR SOCIAL CHANGE

When it comes to business plans, I am of two minds. On the one hand, no one with any sort of business training would consider starting an enterprise without a full-blown business plan, complete with every sort of financial document. On the other hand, thousands of businesses are launched every day with little planning or forethought. The ones that survive make it on sweat, prayer, and intuition. Some of them grow and prosper by learning the lessons of

hard experience. It might be heresy to suggest that you can earn a profit without a business plan, but it's true.

Entrepreneurs are defined by their instincts — their intuitive answers to questions such as, "What does the market need?" — and their enthusiasm to fill that need. If you don't have a nose for business — if you can't smell an opportunity when it walks up and breathes in your face — even the best planning process in the world will not compensate. (Of course, it's always smart to use market research to test and confirm your instincts.)

That's one side of the argument. Here's the other: even though many successful nonprofits do not have formal business plans, they still know where they're going and how to get there. Sometimes the plan takes the form of a grant proposal or a detailed letter to a donor soliciting start-up funding. At other times, the plan is hashed out during long discussions; the decision-makers have a common understanding, though perhaps not a paper trail. Sometimes it's folded into a larger strategic plan for the organization.

Cynthia Massarsky makes a strong case for business planning. In *The Nonprofit Entrepreneur* she writes, "Emerging businesses need a written plan to force careful thinking, encourage discipline, forge internal communication, and enhance coordination and clarity of purpose among their managers and investors. They need a business plan to determine the amount of capital required, and to help raise it. And, once the business is operating, they need a yardstick against which to define and measure their progress."

At some point, intuition becomes inadequate for the job at hand. You need a strategy to help you shape and apply your best instincts. That's when it's useful to have a plan. Furthermore, planning will give you a competitive advantage, since it forces you to think ahead, which will help you avoid some pitfalls.

A MATTER OF SCALE

Do you need to prepare a formal business plan? Your decision will depend on two factors: First, the size of your proposed project. How much time and effort will it take, and how many people will it employ? How much money is required? Second, whether you can raise the initial funding from internal sources — current income, cash reserves, gifts from members and donors — or you will have to go outside the organization for capital.

If you're considering a relatively small or inexpensive venture or you expect to generate the money internally, you may not need a complete business plan — though a less formal planning document is still an excellent idea. If you're looking at a big project, however, or you hope to pursue outside funding from a bank or "social lender," a

formal business plan is in your future. Investors don't like risk, and the process of preparing a business plan helps you to identify and address the risks associated with your enterprise. By writing a comprehensive plan, you'll improve your odds of securing the funds you need.

How big is "big?" The Food Bank of Western Massachusetts prepared a business plan to create and market microwave popcorn — start-up expenses, \$20,000. The SouthWest Organizing Project in Albuquerque wrote one for the publication and distribution of its textbook, *500 Años del Pueblo Chicano/500 Years of Chicano History* — up-front costs, \$25,000. Milwaukee's Esperanza Unida created a business plan for its bookstore, *¿Qué Pasa? Coffee and Books* — initial investment, \$65,000. These are substantial sums, and with that much money on the line, thorough preparation is essential.

No matter the scope of your venture, it always helps to organize your ideas, and especially the financial projections, by writing them down. If you can't make your project work on paper, you'll have a much harder time making it work in the real world.

HOW TO USE A BUSINESS PLAN

An effective business plan does two jobs. By laying out your strategies and benchmarks, it assists you in running and evaluating your venture, month by month. By outlining your financial goals and your design for achieving them, it helps to attract outside funding, specifically grants or loans.

Employing the first use is sometimes called "managing against the plan." The staff members of White Earth Land Recovery Project in Minnesota refer to their plan from time to time as way of checking their expectations against reality and adapting accordingly. Here's what they've learned: the business plan includes a lot more work than they can accomplish, given the limitations of available funding and staffing. As an idealized picture of the enterprise, it reminds them of their ultimate goals and helps to guide choices about marketing strategy.

As mentioned, outside investors — foundations, banks, "social lenders" — will require some form of business plan to justify the use of their money. In fact, they will often review your plan and suggest changes before seriously considering a loan or a grant. Even if you're not seeking external funds, you might approach an appropriate organization — perhaps your local community loan fund — and request an informal review of the document. An outsider is bound to raise questions no one in the group would ever think to ask. In this way, you can use the business plan to evaluate your project before you look for financing.

COMPONENTS OF A BUSINESS PLAN

The following summary is adapted from a booklet written specifically for small nonprofits by William A. Duncan and published by the Center for Community Change (and, unfortunately, now out of print). Like grant proposals, business plans follow a more-or-less standard format, though experts tend to use different phrases or put the sections in a different sequence. In fact, a business plan is not unlike a grant application. If you've prepared a proposal for your venture, you may already have a good start. A typical business plan, including financials and supporting documents, is forty to fifty pages long and has the following elements:

- **Executive summary.** A one-page summary of everything to follow.

- **Definition of the business.** What business activities will you engage in? What goods and services will you sell, and to whom? How do these sales activities relate to the mission, goals, and programs of your organization?

- **Management and leadership.** Who's in charge? What skills and relevant expertise do they bring to the job? How many people will be employed in the enterprise? This is also the place to discuss support staff — for example, your bookkeeper — and the role of the board and outside consultants.

- **The market.** What's your niche? What makes your products or services unique? This section includes both a market analysis — likely customers, pricing, growth potential, your market share — and a marketing plan — how you will reach your prospective customers.

- **Competition.** Who are they and what can you learn from them? Richard Andrews of Our Community Bikes in Vancouver credits his competitors for teaching him about quality control: "Doing our work consistently and well. Having knowledgeable people who can answer questions." Do you see potential for mutual support through referrals or joint marketing?

- **Technical operations.** What are your space requirements? Who will be your suppliers? How will you manufacture and package your products? How will services be delivered to customers? Detail the nuts-and-bolts of how you will create your goods and services and get them to market.

- **Financials.** The financial section outlines available assets to be applied to the business and describes how loans or other outside capital, if needed, would be used. It also lists external sources of financing. The financial statements — those pages covered with numbers — include the following:

- Projected profit and loss statements for three years (a monthly, quarterly, and annual accounting of how much money you expect to net or lose)

- Projected balance sheets (your assets and liabilities at the end of each year)

- Projected cash flow (your estimate of how much money you will earn and spend, month by month).

• **Supporting documents.** These can include résumés of key staff, board member biographies, copies of contracts and agreements, press clippings, letters of reference, charts and graphs, and any other items needed to tell a compelling story about your venture.

When writing the plan, you may also want to describe your exit strategy: under what circumstances you will “spin off,” sell, or close the business. For nonprofits, potential exit strategies might include creating or spinning off a for-profit subsidiary, selling or giving the business to an entrepreneur, handing it off to another nonprofit, or solving a specific community need via the venture, declaring victory, and shutting it down. For example, Minnesota Public Radio sold its subsidiary, Riverton Trading Company, to a major retailer, while Esperanza Unida transferred job training programs in asbestos removal and

restaurant ventures to training program alumni, who turned them into successful for-profit businesses.

For many grassroots groups, creating the financial statements is the most challenging and frustrating part of the process. Invest the time to prepare your own financial statements — especially your cash flow projections. You can write wonderful, uplifting sentences about your enterprise, but the numbers reveal a different kind of truth, and that truth is often sobering. Make sure the math matches your vision. If it doesn't, you'll need to adjust your vision, your financial projections, or both.

With a plan in hand, you're ready to raise money. Strategies for locating seed money to begin your project — where to look and whom to ask — will be covered in the next issue of the *Journal*. **[GF]**

IN ADDITION TO HIS CONSULTING PRACTICE, ANDY ROBINSON IS TRAINING AND OUTREACH DIRECTOR FOR THE NEW ENGLAND GRASSROOTS ENVIRONMENT FUND IN MONTPELIER, VERMONT. *SELLING SOCIAL CHANGE (WITHOUT SELLING OUT)*, JUST RELEASED IN APRIL, IS AVAILABLE FROM JOSSEY-BASS, 800/956-7739, WWW.JOSSEYBASS.COM/NONPROFIT.

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The **International Campaign for Tibet** is a dynamic human rights organization with offices in Washington and Amsterdam and more than 75,000 members. ICT is a growing organization which secures humanitarian aid for refugees, monitors religious

CLASSIFIEDS continued on page 16

CLASSIFIEDS *continued from previous page*

freedom in Tibet, and works closely with the Dalai Lama's government in exile. ICT seeks a Development Director to manage foundation grants, major gifts and planned giving. The ideal candidate will have a minimum 5 years experience in development, a proven track record of success and outstanding management skills. Salary commensurate with experience. Excellent benefits. Fax or e-mail cover letter with salary history and a resume to John Ackerly, (202) 785-4343, johna@savetibet.org.

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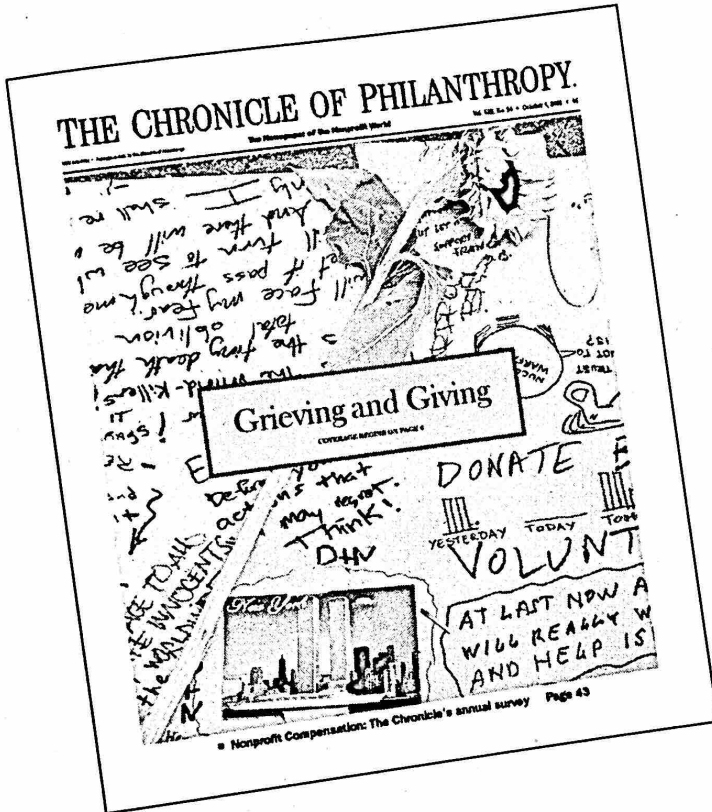
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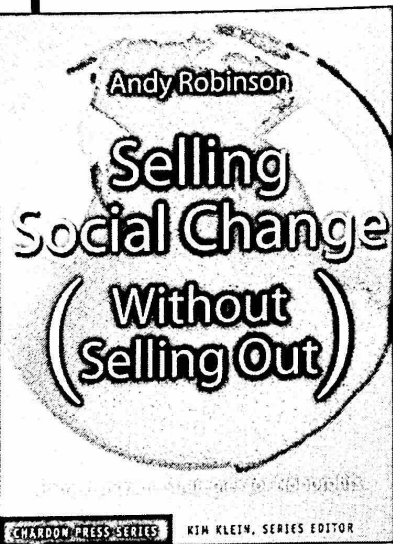
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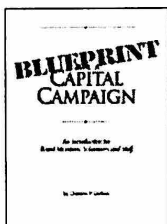
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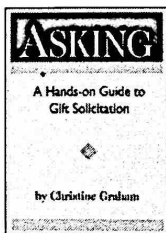
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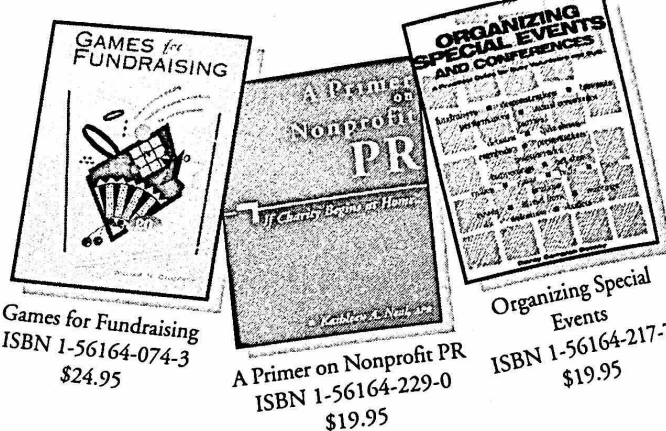
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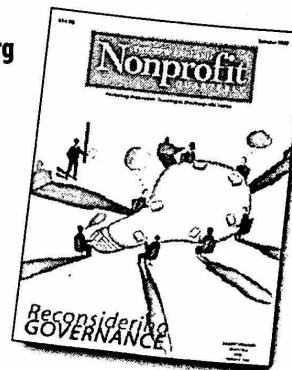
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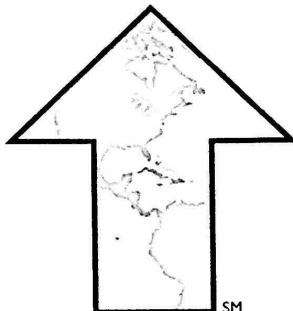


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