

Grassroots Fundraising Journal

VOLUME 21 ■ NUMBER 5 ■ SEPTEMBER/OCTOBER 2002

Featuring:

**RAISING
MONEY IN
ALL-VOLUNTEER
ORGANIZATIONS**

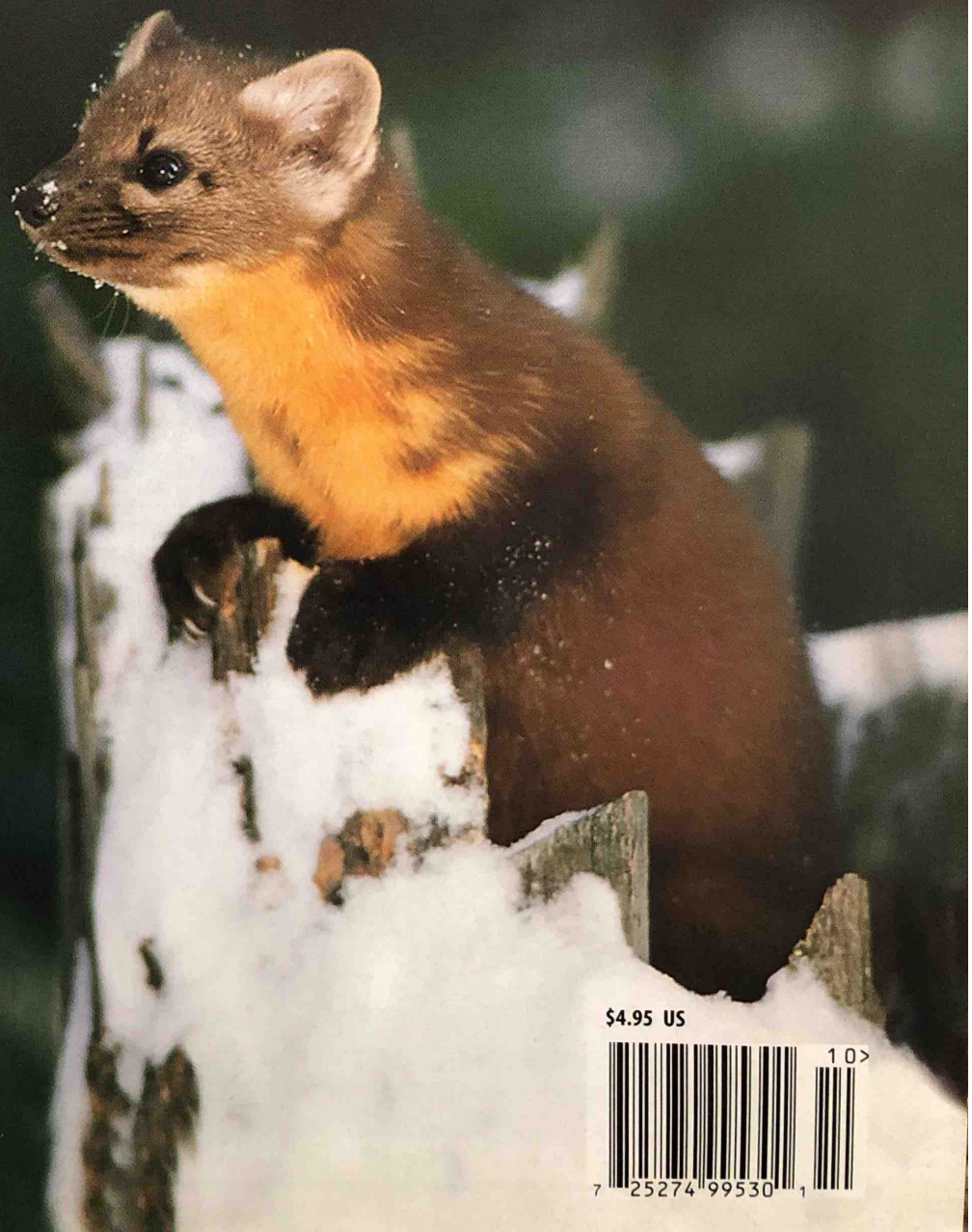
By Kim Klein

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**DIRECT MAIL
TECHNIQUES THAT
SMALLER ORGANIZATIONS
SHOULD AVOID**

**TEN QUICK WAYS TO
IMPROVE BOARD MEETINGS**

**RECOVERY AND
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On Our Cover THE PINE MARTEN FEATURED ON THE COVER IS ONE OF MANY ANIMALS WHOSE HABITAT IN THE LOOMIS STATE FOREST IN WASHINGTON STATE IS NOW PROTECTED, THANKS TO A CAMPAIGN RUN BY THE NORTHWEST ECOSYSTEM ALLIANCE. RAISING \$15 MILLION FROM THOUSANDS OF INDIVIDUALS ENABLED THE GROUP TO PURCHASE 25,000 ACRES OF LAND AND PROTECT IT FROM LOGGING. (SEE ARTICLE IN VOL. 18 # 6 FOR THE STORY OF THIS AMAZING CAMPAIGN.)

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LETTER FROM THE PUBLISHER

2001 Giving Figures at All-Time High

KIM KLEIN

Good news came from the American Association of Fund Raising Counsel in their annual report, *Giving USA*, which compiles the total amount of money given to 501(c)3 nonprofits in the United States by the private sector.

In 2001, the total amount given, \$212 billion, was an all-time high, up from \$204 billion in 2000. As usual, the lion's share came from individuals living (76 percent) and dead (7.7 percent in bequests). About \$1 billion was given in response to September 11, or half of 1 percent of the total. Although that is a large amount of money, it is insignificant as a factor in the total amount given.

As usual, too, religion was the major beneficiary, with 38 percent of giving going to that category; the next-biggest category, education, lagged at 15 percent. Human services got only 9 percent of the pie, arts and culture 6 percent, and public/society benefit only 3 percent.

Religion continues to lead the pack for two reasons: religious groups make up more than one-third of all nonprofits, and religious groups ask for money systematically and constantly.

Foundation giving was up 5.4 percent last year, a much lower increase than the year before, but still strong. By law, foundations are required to give away 5 percent of their assets every year, as determined by averaging over five years. In 2001, there were four good years in the five-year average. In 2002, there will be three good years and two bad years, and by 2003, foundation giving will include three bad years, which will cause it to decrease rather precipitously. It will take several years of good stock market returns for foundation giving to recover.

The 61,000 U.S. foundations represent a significant portion of wealth, with \$458 billion in assets. However, their giving to people of color is shrinking and constitutes less than 8 percent of giving, while social justice causes merit only 1.3 percent of foundation grantmaking (see the National Committee for Responsive Philanthropy's report, *The State of Philanthropy 2002*).

Corporate giving rose by less than inflation, only 2.6 percent, and will probably be weak this year as well. As always, individuals are the only truly reliable source of steady donations to nonprofits. (For more on these statistics, go to www.aafrc.org.)

This issue of the *Journal* will help you continue to raise money from individuals. In it I begin a series on raising money for all-volunteer groups, Jan Masaoka gives us some straight talk about running better board meetings, and direct mail expert Steven Hitchcock shares recent findings about some direct mail practices that no longer work.

If you have sent in the *Journal's* reader survey—thank you. If you haven't, please do. We really use those surveys to create plans for the next few years. If you have lost your survey, send us an e-mail and we will e-mail one to you. While you are at it, visit our Web site, www.grassrootsfundraising.org. It is ever-changing and always great.

Raising Money

IN ALL-VOLUNTEER ORGANIZATIONS



BY KIM KLEIN

The trajectory of most nonprofits is as follows: three or four people decide to start a group. They want to stop a box store from coming to their community, send their children to a music camp, keep someone on death row from being executed, protest U.S. military involvement in any number of countries, or whatever. Unless their project is something that will begin and end within a limited time period, they will work hard as volunteers, raising money from their community, then write some proposals and try to get funding for staff. With one staff person, their work will expand until they see they need to hire a second one, and so on.

Much has been written about how groups that have staff can do fundraising, but all-volunteer groups or, understood more accurately, groups with only unpaid staff, have their own fundraising needs. This article looks at the steps for an all-volunteer group in forming, setting goals and priorities, and raising money and offers some principles to keep in mind.

To help articulate these steps and principles, I use an ideal group created from an amalgam of real organizations to illustrate best practices in all-volunteer organizations. Future articles will explore situations that don't work quite so smoothly and how to meet other challenges.

THE SCHOOLHOUSE PROJECT

A small city of 50,000 people has an old, two-room school house built in the 1930s that sits on two acres of land at the edge of town. It is owned by the city and is the responsibility of the city council. It has not been used as a school house since the 1960s. During the 1970s and '80s, the land was maintained as a park and the building was used for meetings, parties, and weddings. When the city built a

nicer community center, the school house became a storage shed for the lawnmower and other equipment needed to maintain the acreage. By 1995, the park was rundown and had become a place for noisy parties, racing mountain bikes, and driving off-road vehicles.

Ellen Schmerling grew up in this town. When she moved back in 1998, she was

*"If money were no object,
what would we do?"*

*This question is one
of the first any group
should ask itself.*

shocked to see how neglected the old school house had become. Her mother had gone to that school as a child and Ellen had attended many parties there as a teenager. She and three friends decided they would like to help "save the school house," though none of them really knew what that would actually look like.

STEP ONE: Do your research and learn your options.

Many volunteer groups come together, like Ellen's, with an idea of their mission, but no clear sense of how to go about accomplishing it or even what the best outcome might be. This is fine. In the beginning, you are not required to know exactly how you want things to come out beyond your general goal, but you need to gather information that can help you clarify your purpose.

After some research, Ellen and her friends discovered they weren't the only ones interested in the schoolhouse property:

- The Historical Society (also an all-volunteer group) was interested in getting landmark status for the building and making it into a museum. They wanted to restore the two-acre property to a park and picnic area with an outdoor display

of old farm implements and other large items that had been donated to them over the years. Cost of this option to the Historical Society: upwards of \$750,000 to restore the building and the park, plus ongoing maintenance of the museum and the land.

- A developer had offered to buy the property, tear down the school house, and build five luxury homes on the site. Cost of this option to the Historical Society: zero cash, immeasurable loss of a potential historic landmark and open space.

- The city council also had a proposal: They would sell the acreage to the developer, have the school house building moved to a vacant lot downtown, pay most of the building's restoration expenses, and give the property and building to the Historical Society. They wanted the cash from selling the schoolhouse land as well as the hefty property tax revenues from the houses that would be developed. Cost of this option to the Historical Society: about \$100,000 plus ongoing maintenance.

STEP TWO: Decide how you want to make your decision.

Many groups start out thinking they can figure out how to proceed by themselves. After a while, however, it becomes clear that they will need community input if they are going to have local support for the project. This is what happened to Ellen's group.

With the information from their research in hand, Ellen and her friends must decide what to do next: Do they join the Historical Society to help them save the school house,

or do they work independently? If they join the Historical Society, how do they help the society decide how to proceed?

Ellen and her friends decide to throw in their lot with the Historical Society. This gives them a structure and a reputable, if tiny, organization to work with. The Historical Society operates on a budget of \$20,000 a year, which they raise from members, from the sale of postcards, and through an annual tour of the most historic houses in the town. It is clear that two out of the three choices facing the Historical Society—renovating the school house and its property on site or taking it over once the city moves it—would require significant funding. To take either path would require the Historical Society to become a lot bigger. At the time that Ellen and her friends approach the society, the small group couldn't imagine growing enough to take on either option; they had decided not to oppose the developer's plans.

When Ellen's group joins the Historical Society they become known as the "School house Project." The enthusiasm they bring to the issue makes the Historical Society realize that they should at least try to save the school house.

They review what Ellen's group has learned. Letting the city move the school house is by far the cheaper option for them in terms of restoration and ongoing maintenance. Furthermore, the downtown location may bring more people to the museum. Perhaps the developer would even help defray some of the ongoing costs as a goodwill gesture. Moreover, the city seems to favor that option.

On the other hand, the choice to restore the school house on its present site has the most historical integrity. Keeping the acreage in open space is appealing as the city grows and begins paving over and building on formerly open land. Thinking several generations out, restoring the school house and the land is the most attractive choice. Thinking more immediately, it is scary and possibly unrealistic to raise that much money in a town of this size.

The group mulls over its choices at a number of meetings. At one, the discussion about how much money they can raise goes on so long that the group realizes they are not talking about the project at all, just the money. They ask themselves, "If money were no object, what would we do?" They have come to an important point: This question is one of the first any group should ask itself.

They affirm that their first choice would be to restore the school house in its current location. But they know that because the goal will be challenging to reach, they need to involve many more people in this ambitious campaign.

It becomes clear that they will need community input if they are going to have local support for the project.

STEP THREE: Test the feasibility of your ideas with a small number of people who are not in your group. If you can, talk to people who will actually have some influence so that you can anticipate challenges and know who your allies are.

First, the Schoolhouse Project talks to the mayor and members of the city council. Would they put in some city money if the school house stays where it is? To their surprise, the council is divided. The mayor likes the idea of leaving the school house at its historic site, as do three council people. Three others are in favor of moving it.

Next, the project talks to the developer. Would he give the project money if they move the school house? Answer: Probably not. He doesn't appreciate the significance of this "falling down old building."

They talk to some of the wealthier and more generous people in the town. Would they donate to a school house project? Which location is more appealing to them? Most people lean toward wanting to keep the school house where it is. No one except the developer favors simply tearing it down.

In many volunteer groups, there is no need to do such extensive community research. The options are clear or the group has made a decision about what it wants to do. Sometimes, there is little time for debate. However, it is always best to take as much time as is needed to make a good decision and to get as many people involved as possible. This will increase all-important "buy-in" from the community.

After this "feasibility study," the Schoolhouse Project decides to invite the community to a town meeting to talk about the options and see where the bulk of community support lies. Though it will entail a lot of work to clean out the school house and clear the grounds for the meeting, the project feels that being on site is the best way for people to see what is at stake. Ellen pays high school students to mow the grounds and a cleaning service to clean out the building. One of her friends gets her church youth group to do a quick paint job so the place won't look quite so dreary. She donates the cost of the paint and brushes.

Principle One: Once you start spending money, keep track of all financial expenses, even if you never intend to be reimbursed.

Volunteers often disguise the cost of doing business by picking up the tab for things. At first, this may simply be coffee and donuts for a handful of people at a meeting, then a few stamps, some money in the meter during meetings, childcare, and so on. Perhaps none of these costs are significant to the person paying. However, other volunteers

may be embarrassed to admit that they can't afford such incidental costs. By keeping a careful and public record of who spent how much on what, you will know exactly how much your project is costing and people will be more accountable with what they buy. Many groups set a floor for reimbursement: once a person has exceeded \$50 or \$100 in costs the group agrees are legitimate, they will be reimbursed.

Often volunteers try to save money by doing all the work themselves. In this case, although Ellen is capable of cleaning the school house, she has other responsibilities with regard to the upcoming meeting and decides it is a better use of her time to hire the cleaning service.

Principle Two: Make sure you have plenty of public support for a big community fundraising project.

A committee of the Historical Society plans the meeting very carefully. It will last two hours, with Ellen introducing the evening, another member of the society giving a brief history of the school house and the location, and the mayor explaining the options. The audience will then be divided into smaller groups for discussion. In the second hour, participants will report back from their small groups and be able to ask questions, with answers and comments written on large sheets of easel paper.

The meeting is a great success. More than two hundred people attend; most sign in with their name and address as they enter the school house. The consensus of the meeting is that the school house should stay where it is and the Historical Society should raise the money to reno-

Having money to do something you don't want to do is actually worse than not having money to do what you do want to do.

vate it and fix up the grounds. At the end of the meeting, audience members are asked to sign up for the fundraising committee, with the understanding that everyone involved in the project will be expected to make some level of donation. Twenty people sign up to help with fundraising. Many others say that they will be "happy to help" but not with fundraising.

The Schoolhouse Project now has the beginning of a mailing list. It includes the names and addresses of people who were interviewed before the community meeting and people who signed in at the meeting. The project also has a clear community mandate for how to proceed; so far they have encountered little resistance.

Other organizations, working on more controversial projects, may find their community divided about what to do or may find the community is not that interested in what they are proposing. However if, like the Schoolhouse Project, the group takes time to discuss the issues, explore options, figure out costs, and so on, resistance or apathy will become apparent long before any large meeting.

Principle Three: Before beginning fundraising, be clear about program goals and in agreement about how much money is to be raised. Don't separate fundraising from program.

This can be more tricky than it sounds. A group will sometimes barrel ahead with fundraising under the philosophy that "We'll need the money sometime." But, if program plans are not yet clearly defined and the members of the group have not agreed on what the money is specifically being raised for, such fundraising can backfire.

In one organization, for example, a couple of members decided to start raising money before the board had established clear goals and objectives. They sent out a fundraising letter to friends describing the general idea of the group. They got a few donations, but hadn't thought through who was going to send thank you notes, track names, or even who was going to deposit the checks. One member had a friend whose family had a small foundation. The foundation offered \$5,000 if they received a short proposal detailing how the money would be spent, so the member wrote a proposal for what he thought the group should do. The funding put them on a path that did not have the full support of the membership, and required several tension-filled meetings to work out.

It may be hard to believe, but having money to do something you don't want to do is actually worse than not having money to do what you do want to do. The latter problem can be solved by raising money, but the former problem is more difficult to solve.

STEP FOUR: After your first public foray, regroup, reassess, and recommit.

Though excited, the volunteers for the Schoolhouse Project realize that the project is a going to involve a lot of time. Plus, they are about to commit themselves to raising \$750,000—something none of them know how to do. The volunteers at the Historical Society also realize that the Schoolhouse Project could dwarf all their other work and

that if they proceed they are making a commitment to become a very different group than they have been all these years.

Ellen suggests that they meet together for a full day to think through what they will do. They agree and decide to meet at the school house. Ellen is worried that this work is taking too much of her time; she knows others in the group are also feeling pressed. Once there is a clear sense of what volunteers can do, it will be time to call the people who offered to help.

Ellen asks a colleague who is a professional conference planner to facilitate the all-day retreat. She leads the group through creating a fundraising plan, with a task list, a timeline, and a budget with a cash-flow plan. She helps them get a sense of how many more volunteers they will need to meet their goal, and what structures will need to be put in place to allow them to manage this project while maintaining their work and family lives.

With the decisions coming out of their town meeting and their planning meeting having detailed the work ahead, the Schoolhouse Project decides they are ready to move forward.

It is at this point that many volunteer groups fold up their tents and go home. Thinking about what they *could* do is very different from actually settling down to do it. Getting clear on the vision of the group, its mission, and goals is a critical piece of work, but now 90 percent of the work remains to be done.

STEP FIVE: When you feel overwhelmed, back up and look at the big picture; then decide what the first thing is you need to do, followed by the second thing, and so on. Divide the work into time-limited tasks as much as possible and assign clusters of tasks to ad hoc committees. Avoid creating standing committees, except for an executive committee that keeps their eye on the whole picture and ensures continuity and communication between and among the volunteers.

Here again it is tempting to dive right in—just do some things, knowing that they have to get done eventually. People delude themselves that activity is progress, that meetings are a sign of forward movement, and that being on the phone or sending lots of e-mails is the same as accomplishing something.

Fortunately, the Schoolhouse Project did not fall into that trap. They created a master list with these categories:

TO DO	BY WHEN	EXPERTISE REQUIRED	NUMBER OF PEOPLE REQUIRED	BUCK STOPS HERE
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*By creating the category
"Buck Stops Here,"
they built accountability
into their plan.*

By creating the category “Buck Stops Here,” they built accountability into their plan. This is slightly different than having someone chair a committee or having someone agree to take on a piece of work. The “Buck Stops Here” person is saying that they take responsibility for getting the task done and know they are accountable for it.

For example, one identified task is entering the mailing list into a database. This involves finding a database they can use (the Historical Society’s mailing list program is not adequate) and seeing if the computer at the Historical Society is powerful enough for the program they select. Next they have to decide what information will go in the database, in what form (what the fields will be), and who will have access to the database. Three people offer to work on that series of tasks. They discover that the Historical Society’s computer is too old to be updated with a workable database program. A volunteer offers to load the database and enter the data onto her home computer, but the group wants to avoid the database being at someone’s house. They will need to buy a new computer or get one donated.

These are important decisions, but they do not involve the whole group. The group needs to have confidence in the decision makers for each task or set of tasks and someone needs to be in charge of making sure decisions are getting made and reported back to the rest of the group.

Ultimately, the database problem became the first task in the fundraising plan: find or buy a new computer for the Historical Society.

STEP SIX: Once you have your fundraising plan, start with something simple and easy to accomplish. The first step can be tiny, but people need to feel successful.

Often, a group taking on a big fundraising project will need to raise a little money just to get started. The Schoolhouse Project decides to have a bake sale with the goal of raising \$2,000; this will also raise awareness of what they are doing and keep them in the public eye. They receive permission to sell baked goods in front of the hotel housing the Historical Society’s office. People who purchase baked goods are also asked to sign a sheet with their name and address and any expertise they would like to offer the group.

The bake sale is helpful in many ways. While raising \$2,000, it also gives volunteers something easy to do (bake sales take a lot of work, but they are not conceptually difficult) and it gives a way for volunteers with a variety of skills to get involved. Plus it increases the mailing list and the list of potential volunteers.

STEP SEVEN: Get financial commitments from the people closest to the organization.

Meanwhile, the larger fundraising campaign is about to start. Those who will be asking for major gifts need to be able to tell prospects that they have financial commitments from everyone involved. In this case, because the project had made clear at the town meeting that all volunteers would be asked for money as well as time, they do not encounter resistance when they solicit donations from their volunteers. In fact, they are pleased when the total volunteer commitments come to more than \$25,000.

STEP EIGHT: Provide adequate training and support to the fundraising team – especially for those who are new to fundraising.

Because the goal of \$750,000 will not be raised primarily from bake sales, but from many gifts of all sizes, including some very large gifts (up to \$100,000), the fundraising committee will need to get some training in asking for money. A member of the Historical Society knows the development director of a local arts group and asks him if he would con-

*Start with the person
most likely to make
the biggest gift.*

duct a training for the Schoolhouse Project volunteers. The training helps members discuss their anxieties about asking and takes them through the steps to a successful solicitation. Although a few of the original people who signed up to do fundraising aren’t able to attend the training, those who do feel much better about the work ahead.

Principle Four: Once you start fundraising, there will be disappointments as well as successes, and often volunteers will do less than they promise.

Ellen and three other people take on the task of going to see some of the prospective big donors they had talked to during their shirttail feasibility study. To get ready to see them, they make sure their budget figures are as accurate as possible and create a gift range chart. At the beginning of this phase of the campaign, the committee is full of enthusiasm. They make a list of ten major donor prospects and put them in an order based on the idea “top down, inside out.” In other words, they will start with the person most likely to make the biggest gift. This may not be the person mostly likely to make a gift, and it may not be the person who is able to give the biggest gift. It is the person who is most likely to say yes to the biggest gift because they are closest to the project or the cause.

They start with Ellen’s aging aunt and her daughter (Ellen’s cousin). Both these women have fond memories

of the school and are pleased that the Historical Society has decided to take on the project and to leave the school on its original grounds. They make a significant pledge to the project.

Buoyed with that news, Ellen calls several times to try to make an appointment with a person she thinks can give a very large lead gift. He finally responds with a message that he doesn't feel confident in the project.

Another member of the committee asking for donations receives a commitment of a major gift from one donor but is unsuccessful in getting appointments with anyone else; a third is unable to make the time to follow up with his contacts; feeling guilty, he stops coming to meetings.

Ellen calls to make an appointment with another prospect for a large donation, but the prospect says she feels this project is not a priority for the community.

At a fundraising committee meeting six weeks into the campaign, only about half of those who had attended the training have made their major donor calls. Ellen's spirits begin to flag. She worries that they aren't raising money quickly enough and that some of the people who volunteered to participate are flaking out.

Principle Five: To keep everyone involved, you have to encourage people to take breaks.

Though discouraged by a series of rejections, Ellen realizes she is taking them personally when they have nothing to do with her.

Ellen also needs to see if the project can run for a while without her daily involvement. She needs to let other people take leadership. She plans a two-week vacation, which the committee encourages. Though feeling somewhat insecure, they know that they have a plan and just need to work their plan.

Principle Six: Fundraising is about building relationships.

While Ellen is gone, her cousin (who had made a large pledge) contacts an old friend who has moved away but still has family living in the town. He is very excited to hear about the project and agrees to meet with members of the school house committee to discuss making a major gift. In addition, a member of the Historical Society contacts a close friend who works for the park service; this person also knows someone from the state arts council who attended the meeting at the school house. These three people meet and develop a joint proposal, which is rewarded with a joint matching grant from the park service and the arts council. Though this group would have maintained that it didn't have the "expertise" to put together a proposal of this type, they found that paying attention to who they knew was more important. Part of this money is to be used to hire a coordinator for the project, who will also be the first staff person for the Historical Society.

At this point, our ideal group has made good progress, but needs to maintain momentum and focus. They have avoided the serious mistakes of many volunteer groups, but still have the challenge of keeping people engaged and active. If they stick with the steps and principles they have followed so far, they should be all right.

In fact, their best bet with the good news of the matching grant would be to return to Step One: Do Your Research and Learn Your Options. They will apply this step to learning what they need to do about hiring a staff person: What is the job? It is full- or part-time? What skills is the group looking for? Who is available in this town? How widely should the group search?

Answering these questions will lead them naturally to Step Two: Decide how you want to make your decision. And so on. **[67]**

LOOK FOR MORE ARTICLES ABOUT ALL-VOLUNTEER ORGANIZATIONS IN THE *JOURNAL* OVER THE NEXT YEAR.

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

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Direct Mail Techniques that Smaller Organizations Should Avoid

BY STEPHEN HITCHCOCK

I worry a lot about smaller nonprofit organizations—those groups that serve a local community or region, especially those that provide human services or that advance the public interest. With overworked staffs and limited budgets, they just can't afford to waste time or money on ineffective direct mail techniques.

Some of these techniques have been around too long. They've become obsolete or overworked. In other cases, direct mail formats used by very large national organizations won't provide enough of the net income so urgently needed by small organizations. Both obsolete techniques and the big-budget formats were designed to generate very small increases in response rates. While over time those small differences add up to a large membership or donor base for those organizations, that is only because they're able to mail in very large quantities, an approach not financially feasible for small groups.

Furthermore, most smaller nonprofit organizations have a more defined audience or a narrower region in which they provide services. If you are one of those organizations, you have to adjust your direct mail techniques to fit your universe—and to faithfully represent your organization's more focused mission. In my sixteen years with Mal Warwick & Associates, a consulting firm that specializes in direct mail fundraising, I've had the good fortune to work with both small and large organizations. Hundreds of tests in actual mailings have helped us learn what's truly effective in direct mail fundraising.

So unless you're a very big organization with a huge budget, here are ten obsolete techniques you should avoid in your mail campaigns. And even if your direct mail program is well funded, you should exercise good stewardship and test these items to make sure they are lifting your response rate or increasing your net income.

PRACTICES TO AVOID

1. *Nonprofit stamps on the outer envelope.*

They cost more than having metered postage imprinted on your envelope, and donors tell us the stamps broadcast "junk mail." Almost all the testing we've done suggests that there is a greater chance that an envelope will be opened—leading to a higher response rate—when postage is metered at the nonprofit rate.

2. *First-class stamps on the outer envelope.*

Using metered first-class postage is usually less expensive, because you can then receive the reduced postage rate for letters that are pre-sorted by zip code. And it may make readers feel "safer" in opening their mail because the mail may seem "business-like." In the area just below the meter, you can print the words "FIRST CLASS" so your recipient senses this is important mail.

3. *Brochures or other inserts.*

Lots of smaller organizations are eager to create an elaborate brochure about their wonderful programs or urgent issues. Other nonprofit groups look with envy on those over-sized, filled-to-the-brim packages that pour out of our mail boxes. Save yourself lots of money—and get a higher response—by adding an extra page or two to your friendly, easy-to-read letter rather than a fancy brochure.

4. *Signatures printed in green or red ink.*

Fortunately, I see fewer and fewer mailings that utilize this technique. I'm hoping that it will disappear completely. It is crucial that your fundraising letters have a bold and legible signature—ideally in dark blue ink and with the person's name and title "typed" below the signature. If it can't be printed in blue, then use black ink—not some cute color.

5. Teasers on outer envelopes.

There are some exceptions. In particular, we've found renewal mailings benefit from some "membership message" on the outer envelope. But in almost every other instance, the use of a question or catchy phrase—for example, "You can make a difference!"—does actually make a difference by lowering the response rate of your mailing.

6. Envelopes that are oversized or use special paper stock.

Except for using 6" x 9" or 9" x 12" envelopes (which you can get at an office supply store in small quantities) to send packets of information to your very best donors, stick with white or cream-colored No. 10 envelopes. Anything else costs way more to print and to have processed by an outside mailing service or lettershop than you'll ever get in increased response.

7. Business Reply Envelopes.

Again, a handful of organizations will get a higher response if they use all those bars of dark print and say "No Postage Necessary" and "Business Reply Mail" in big bold letters. But test after test—for organization after organization—shows that asking donors to use their own stamps gets the same or higher response. And you avoid the added cost of business reply mail—along with the pesky bureaucracy the post office has for getting this mail to you.

8. Credit card option.

Lots of organizations want to give their donors a chance to make a gift via their credit card. Again, our tests have shown that this option doesn't lead to more gifts and, in some cases, discourages response. There's also the percentage of each credit card donation your organization must pay to the credit card processor. To be sure, you may get larger gifts this way, but your organization should be

using direct mail to get more gifts from the largest number of donors or prospects. Large gifts are more likely to come through personal solicitation.

9. Reply devices with gift options that range from \$1,000 to \$10.

I'm not sure this ever worked, but it's certainly become "more obsolete." As you acquire new donors, don't worry about the handful of folks who will give you \$500 or \$1,000 gifts. Most new donors will make initial gifts in the \$15 to \$100 range. And when you're mailing to your current donors, you should give them, at most, three options: their highest gift ever and one or two options higher than that amount.

10. Black, muddy, and hard-to-read photos.

In the good old days, direct mail packages could get away with this. And in the bad new days, the proliferation of inexpensive digital cameras appears to have generated a plethora of fuzzy photos. Printing technology makes crisp color photos almost identical in price to black-and-white photos. And because of advances in technology, recipients have higher expectations when it comes to photos. If you can't use good photos, get by without them.

Reviewing this list of obsolete and ineffective techniques is a reminder that direct mail fundraising works best when the reader feels she is receiving a personal letter from someone who respects her generosity—and trusts her desire to support endeavors she truly cares about. And the time and money you save by avoiding these techniques will mean you'll have resources to communicate more often with those wonderful people who make your work possible. **[B7]**

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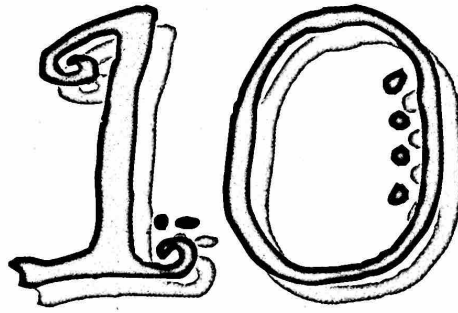


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Quick Ways to Improve Board Meetings

BY JAN MASAOKA

When we think about the boards we're on, we usually think about the board meetings—which says a lot about the importance of having good meetings. Here at the start of the fall fundraising season, make a resolution to implement one of the following ideas each month:

1. Name tags for everyone, at every meeting. It's embarrassing to have seen people at several meetings and wondered what their names are. Later it's really hard to admit you don't know their names.

2. Post an acronym chart. Make a poster of frequently used external and internal acronyms (such as CDBG for Community Development Block Grants or DV for domestic violence) and post it on the wall of every meeting. (If you distribute the list on paper it is soon lost.)

3. Write an "anticipated action" for each agenda item.
Examples:

- "Finance Committee report, brief questions and answers: No action needed."
- "Volunteer recruitment and philosophy: Anticipated Action: form committee of three to four board members."
- "Public Policy Committee: Anticipated Action: approve organizational statement to city council on zone changes."

4. Make sure that each person says at least one thing at every board meeting. This is the Chair's responsibility, but everyone should help! "Cecilia, you haven't spoken on this issue. I'm wondering what you're thinking about it?" "Matt, at the last meeting you made a good point about finances. Are there financial issues here that we aren't thinking about?"

5. No one-way communication from staff. If you have a regular Executive Director's Report on the agenda, or if a staff program director is giving you a briefing, be sure that such presentations need a response from the board. If not, put them in writing in the board packet and just ask if there are any questions.

6. Don't include committee reports on the agenda just to make the committees feel worthwhile. If a committee has done work but doesn't need it discussed, put the committee report in the board packet. (In the meeting, be sure to recognize the committee's good work and refer people to the written report.) Instead, schedule committee reports in the context of the main discussion. For example, if there is a discussion planned on attracting and retaining staff, reports from the Finance Committee and the Personnel Committee may be appropriate.

7. Note to the board president and the executive director: What are the two most important matters facing the organization: economic downturn, changes in government funding, decreased preschool enrollment due to higher unemployment, a competitor organization, demographic changes in the county? Is one of these matters on every board agenda?

8. Encourage "dumb" questions, respectful dissent, authentic disagreements. Find a chance to be encouraging at every meeting: "Sylvia, I'm glad you asked that 'dumb' question. I didn't know the answer either." "Duane, I appreciate the fact that you disagreed with me in that last discussion. Even though you didn't convince me, your comment helped make the discussion much more valuable."

9. **Make sure the room is comfortable!** Not too hot or cold or crowded. Offer beverages and something light to eat, such as cookies or fruit.

10. **Adjourn on time, or agree to stay later.** Twenty minutes before the scheduled end of the meeting, the Chair should ask whether the group wants to stay later: "If we continue this very interesting discussion, we will have to stay fifteen extra minutes to hear the recommendation on the executive director's salary. Can everyone stay that long, or should we end this discussion and move to that one immediately?"

BONUS: Once every year or two, survey the board about meetings. Pass out a questionnaire for anonymous return to the board vice president or secretary, asking, "What do you

like best about board meetings? Least?" "Are you satisfied with the items that are usually on the agenda?" "How could the board president do more to encourage discussion at the meetings?" "Is the location or time of day difficult for you?"


JAN MASAOKA IS EXECUTIVE DIRECTOR OF COMPASSPOINT NONPROFIT SERVICES, A LEADING CONSULTING AND TRAINING FIRM HELPING NONPROFITS LEAD CHANGE. WWW.COMPASSPOINT.ORG.

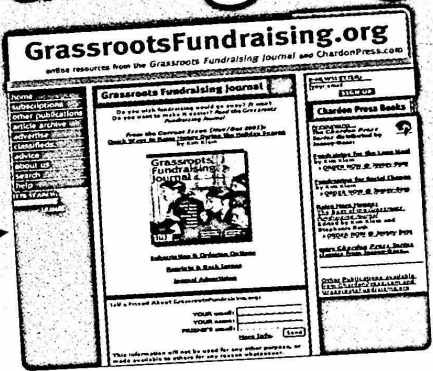
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Recovery and Raising Money

BY MIGUEL P.

Though I have been raising money professionally for fewer than five years, I believe that anyone, equipped with a plan and passion for a cause, can raise enough money to build a healthy organization that endures. Professional fundraisers do not have a monopoly on planning or passion. I recently discovered an example of ordinary people raising money in a place I never expected—at a 12-Step meeting.

After years of struggling with severe depression and addiction, I made the painful decision to enter a rehab facility for a 30-day in-patient program. The difficult emotional and spiritual work that followed began a long journey for me. Much of this work has been done in 12-Step groups. While I knew that I would find personal support, I never expected that other recovering addicts would have so much experience at raising money.

Alcoholics Anonymous, founded in the 1930s, created the 12 Steps as a suggestion for recovery from alcoholism. Since then, the 12-Step principles for living a healthy life have been translated into more than a dozen languages and adapted to support people in recovery from other addictions, including drugs, sexual compulsion, overeating, gambling, and co-dependency. Combined, these groups have transformed the lives of millions of people around the world.

12-Step groups help addicts transform their own lives. There are no experts to offer advice and certainly no professional fundraisers to raise money. Yet 12-Step groups have managed to raise enough money to change the lives of millions of people for more than seventy years. In fact, these groups have also accomplished their mission without foundation grants, corporate sponsorships, or fancy events. Declining outside contributions, 12-Step groups only accept financial contributions from their members. This prevents them from being distracted from their primary mission.

FOUR PRINCIPLES FOR SUCCESSFUL FUNDRAISING

Fundraising in my 12-Step fellowship relies on basic grassroots fundraising principles and the passion of its members. While it was easy for me to see the passion at work among recovering addicts, it took me some time to recognize the fundraising principles at work. Eventually I

noticed four basic principles at the heart of the fundraising efforts of my 12-Step group. Not surprisingly, they reflected the fundamental fundraising principles I learned years ago:

- *First*, every member knows the purpose of the group.
- *Second*, members are asked for contributions directly and frequently.
- *Third*, everyone is invited to participate in the fundraising effort.
- *Fourth*, raising money builds healthy relationships among members.

There are certainly a variety of ways to practice these principles. While my 12-Step group has its own unique approach to fundraising, I found their example an inspiring take on these fundamental principles, each of which is described below.

A Common Purpose

I have worked in organizations whose mission statements amounted to little more than a piece of paper hanging in a dark corner. Most of my co-workers, including myself, would have been hard pressed to recite even a part of the mission statement. In fact, each of us had dramatically different opinions on why our organization existed.

Organizations and groups that are divided (or in the dark) about their mission have little chance of staying true to that mission over the long term. Raising money often becomes an exercise in building programs that can bring in money. As a donor, I am not inclined to support an organization financially when I receive different versions of the group's purpose from different members.

In contrast, my 12-Step group leaves little doubt as to its purpose. Almost every member, including newcomers, can recite the AA mission: "To carry the message [of recovery] to the addict that still suffers." One reason that every member knows the purpose is that we repeat it at almost every meeting. Far from being a forgotten statement on an obscure piece of paper, the purpose of our group is openly discussed, sometimes in great detail. This seems to make our fellowship much stronger. While people have different ideas of how to carry the message, no one disputes the purpose. This leaves little doubt among potential donors (our members) as to why the group is worthy of financial support.

Nonprofits must also engage their donors, volunteers, staff, and board members in open discussions of their group's purpose. When the statement of purpose ceases being a source of contention, it can become the foundation for building a stronger case for financial support. This makes asking for money much easier.

Asking Directly and Frequently

The ability to ask for money is certainly not easy. I have witnessed bright, articulate, and committed individuals shrink in terror of asking a friend to make a financial contribution to an organization in which they are involved. Given this fear, the constant fundraising maxim that it is best to ask for money directly and frequently is not a popular one to implement. Yet it works well.

In the 12-Step fellowship in which I attend meetings, as in most, money is solicited openly and repeatedly. In fact, I discern little apprehension on the part of members to ask one another for money. Several techniques have eased the effort considerably. First, the chair of the meeting always makes the pitch for support. Chairing the meeting is a rotating, volunteer position that most members undertake. Second, the pitch is scripted so that even a first-time chairperson can make it. And third, the chair asks for support at the same point at every meeting and is the first to drop their gift in the basket. In this way, all members know when and how to give. This leaves little room for ambiguity over how to support the group.

Asking people directly and openly for financial support indicates respect for their ability to make up their own mind. I rarely appreciate covert attempts to solicit my financial support and find it a monumental waste of my time. In my work as a professional fundraiser, I also find donors are capable of deciding how often they wish to give; their frequency usually has a direct correlation to how often I am willing to ask. I find most fundraisers vastly underestimate the profound good their work accomplishes. Fortunately, donors and members of our communities know and are willing to make repeated gifts. Similarly, every member of my 12-Step fellowship has asked other members for support openly and repeatedly.

Everyone Raises Money, Building Relationships

The idea that all members of a group have a responsibility to assist in raising money is still resisted, especially in large organizations with dedicated development staff. In 12-Step meetings, I have witnessed something quite different. Every member plays some role in the fundraising process. Some participate by making the pitch when they are the chairperson. Almost all members make regular contributions. Still other members assume responsibility for regularly providing fundraising updates to the group and informing

members of specific needs. In this way every member participates in raising money to the best of their abilities.

When I decided to raise money professionally, I envisioned myself as the organizer who coordinates staff, volunteers, and even donors to raise money. I found, however, that many groups expected development staff to magically raise the annual budget without bothering other staff and volunteers. This assumption overlooks the obvious fact that more people asking for money will translate into raising more money. And more people asking also builds relationships among the various constituencies of an organization.

In previous *Journal* articles, Kim Klein has warned of the danger of treating donors "like ATM machines." Besides the observation that donors are people, not objects to be manipulated, treating donors in this manner violates what many agree is the primary goal of fundraising, which is building relationships. Build relationships with your donors and the money will always follow. This is vital for the long-term success of fundraising efforts.

At the very heart of the success of 12-step groups is building strong relationships among members and to the group itself. These relationships certainly change over time. Yet 12-Step groups allow members to decide for themselves how they wish to relate to the group and to other members, within specific guidelines of confidentiality and anonymity.

Giving money is an important way in which members demonstrate the depth of their relationship to the group and to fellow members. Sharing a common purpose as well as fundraising responsibilities has clearly deepened my own relationship to the group. This clearly makes raising money in the group less of a burden and more a tool for building healthy relationships among members and to the group itself.

TRANSFORMING LIVES

The recovery community has offered me a brilliant example of successful fundraising. More than that, it offers a wonderful example of what people can accomplish for themselves. It has also confirmed many of the fundamental principles I learned as a grassroots fundraiser.

While not every organization can practice these principles in the same way my 12-Step group does, I offer these observations as proof that raising money is not magic best left to professionals. Committed people with a passion and a plan raise money all the time.

I am proud to be both a fundraiser and a recovering addict. Both allow me to support people and organizations that transform our world into a much better place. **GF**

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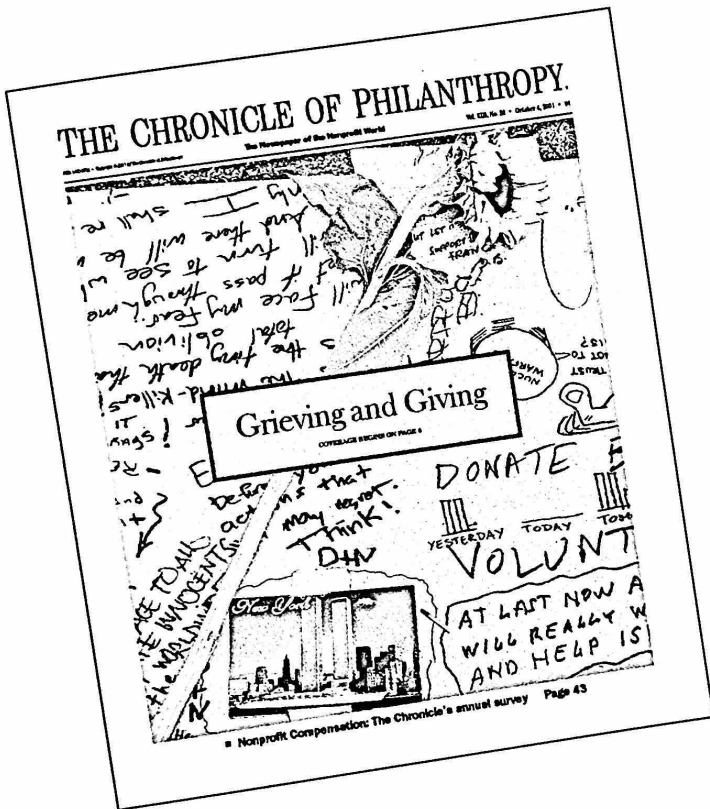
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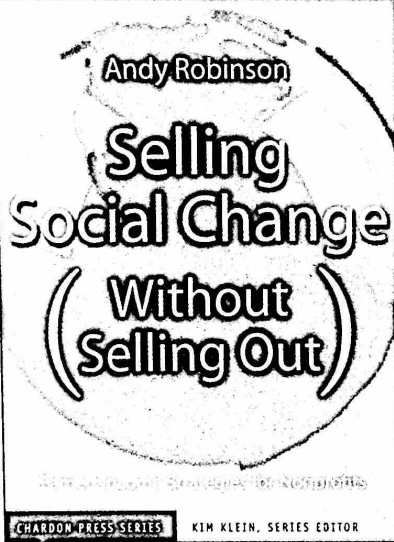
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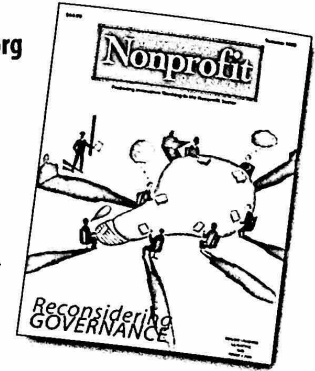
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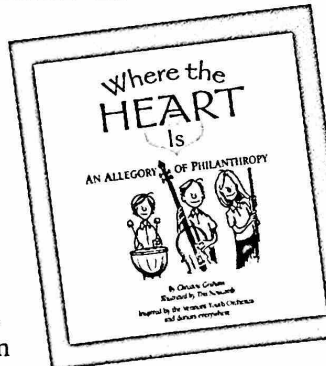
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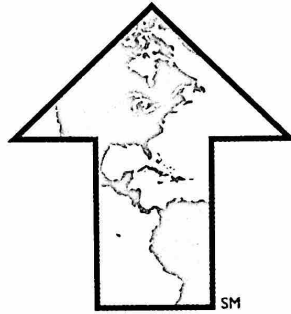
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