

FUNDRAISING IDEAS THAT WORK!

Grassroots Fundraising Journal

VOLUME 22 • NUMBER 6 • NOVEMBER/DECEMBER 2003



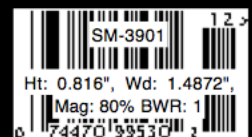
FEATURING:

THE EVOLUTION OF A SPECIAL EVENT

BY KRISTINE ALBRECHT
AND CHRISTIANE CARMAN

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Primary Fundraiser
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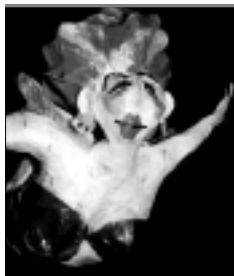
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LETTER FROM THE PUBLISHER

KIM KLEIN

You are probably taking a brief break from the mania that characterizes year-end fundraising in order to read this issue of the *Journal*. I promise it will be worth your while. There are still a number of ways you can raise some final dollars before January 1, and you will want to use as many of them as you can. Here are a few things you may not have thought of:

- ***This is a good time to invite your lapsed donors back.*** Anyone who has not given in the last 12 months or more should get a special appeal: "Come home for the holidays to Good Group. We missed you."

- ***Before December 15, make follow-up calls to anyone you are surprised has not given recently.*** The list can include people who have given \$25 for three or four years and have now stopped, as well as your major donors. The holidays are so rushed that people lose track of groups they give to, or they keep postponing sitting down and writing those checks.

- ***Many people feel — and are — poorer than last year and will be thinking of cutting back on their giving.*** Don't let your group be the one they cut out. Personalized requests, personal notes and follow-up calls will be worth the effort.

- ***Make sure there is someone in the office during the last week of December.*** I have often received some very large gifts on December 31st from last-minute, down-to-the-wire donors who want to give stock or have their gift recorded in this tax year. Far too many organizations close during this time; those that stay open win the prize.

That's enough tips. If you do all four, that will be three more than almost everyone else!

In this issue, Kristine Albrecht and Christiane Carmen tell how their Montessori School has built an auction into a major donor event, both bringing in lots of money and building loyalty among some very significant donors. Mary Humphries, a friend and colleague from Training Resources for the Environmental Community (TREC), shares her perceptions on being an effective development director. And I suggest some new ways of thinking and talking about overhead costs.

2003 has been a difficult year for the nonprofit sector. If your organization has survived these last twelve months (even if you have not grown, and even if you have had to make some cuts), I want you to find a recording of Gloria Gaynor singing "I Will Survive" or Reba McIntire singing "I'm a Survivor" and turn it up loud. Then fix a strong serving of whatever you drink and congratulate yourself. On December 31, I want to hear the clinking of cups and glasses, whether chamomile tea or Jack Daniels! 2004 — here we come!

The Evolution of a Special Event:

FUNDRAISING AT THE SANTA CRUZ MONTESSORI SCHOOL

BY KRISTINE ALBRECHT & CHRISTIANE CARMAN

EDITOR'S NOTE: In this case study of a very successful special event, note that much of the event's success comes from a major donor program cleverly embedded in the event's design. As in all successful fundraising, personal solicitation is key here to getting large gifts.

—KIM KLEIN

When we became involved with fundraising at Santa Cruz Montessori School in 1998, the school's primary fundraising efforts grossed \$75,000. That year, the Annual Auction, which was the focus of our fundraising efforts, brought in \$32,000. Over the years, by refining aspects of the event to suit the needs at the school and by concentrating on building a large volunteer base and a sturdy sponsorship program for the event, we have been able to increase the Auction's income every year. Last year, the school recorded \$276,000 in fundraised money, of which the Annual Auction contributed \$167,000.

THE CASE

Our involvement began when the school director and the Board of Trustees identified that the Arts and Classroom Enrichment program needed additional funding. Since we both felt strongly about the importance of art in the classroom, we offered to chair the school auction to help fund the program. We were driven by the case.

THE VOLUNTEER BASE

Though we had been involved in nonprofit work in the past, we were new to the world of event fundraising. Neither of us had attended an auction and we knew very little about it. We gathered information from parents who had organized the event previously and then mapped out a plan of action.

First we expanded the volunteer committee for the auction from 5 to 50 (from a parent body of approximately 230 families) by tapping the Parents' Club volunteer base,

asking all of our friends, and advertising in the school newsletter. We realized that each volunteer was different in how they liked to work. Some people preferred working on their own at home while others preferred to work in a group setting. When we could honor these different work styles the benefits were great. Because each volunteer was able to offer varying time commitments, we made sure to express that any time given was appreciated and valued, whether it was one afternoon or months of commitment.

We increased our volunteer base over the years, making it a priority to engage and involve new parents each year. Auction committee meetings were designed to create a social atmosphere where parents could connect with one another outside of the realm of their child's classroom and have some fun. Since it was often difficult for parents to take time to attend meetings, we made every effort to provide childcare, stick to our agendas, and run the meetings efficiently.

We knew that the more people we involved in the planning and orchestration of the event, the more successful the event would be. We broke down the work tasks into twenty-four sub-committees, with a volunteer chair for each (see sidebar).

In the ten months of planning leading up to the event, we held monthly meetings and encouraged sub-committees to meet regularly. Sub-committee needs and updates were reported at the general committee meetings. The general meetings also provided a time to acknowledge volunteers for all of their efforts.

PARENTS
TENDED TO
BID MORE
GENEROUSLY ON
ITEMS THAT
WERE CREATED
BY THEIR
OWN CHILD.

We came to know the strengths, styles, and preferences of our volunteers and gave them autonomy to do their work. We realized the importance of individual contributions and we felt extremely grateful for the hard work being done by so many people in the school community.

THE SILENT AND LIVE AUCTION

The event consisted of a silent auction with hors d'oeuvres and a sit-down dinner followed by a live auction and dessert. We chose a theme for the party, such as a foreign country, and chose food, decorations, and music accordingly. We sought to provide a festive evening and an environment for parents to enjoy some time with friends, out by themselves, without children.

The first year, the silent auction consisted of approximately 300 items. Though in later years the silent auction grew to more than 600 items, we came to realize that the dollar amount raised did not significantly increase with the greater number of items provided. With more items, there was less opportunity to bid the items up in the time allotted for the silent auction. We eventually found that 400 silent auction items and about 40 live auction items were optimal for a crowd of about 230 people.

As a rule of thumb, one can expect to receive approximately half the dollar amount of the value of the silent auction items. Our goal was to raise \$25,000 from the silent auction, so we needed \$50,000 worth of donated items. Typically, certain items fared better than others in the bidding process, so we concentrated our efforts in later years on obtaining items that frequently sold at or above value, such as restaurant gift certificates, wine, and handcrafted items.

The live auction consisted of about 50 items, about 35 of which were art projects created by the children. Each classroom created three projects. For example, an elementary classroom of about 30 children contributed three ceramic birdbaths, with about ten students working on each birdbath. The names of the children were etched on the pieces. Parents tended to bid more generously on items that were created by their own child. The auctioneer always made a point of announcing the names of

the children associated with each project.

The other 15 live-auction items were such things as weekend get-away packages, dinners, theater events, bicycles, and the like. We provided at least one high-value item. In the case of a Polynesian auction, we approached a major donor at the school, who donated a week at their Hawaiian vacation home!

Because the live auction had the potential to raise a large amount of money the night of the event, it was very important to us to obtain a professional auctioneer. A professional can potentially realize your organization tens of thousands of dollars; she or he is well worth the fee. In our area, a high-end auctioneer can cost from \$500 to \$900 for the night. Our auctioneer worked at our auctions for five consecutive years, providing us with crucial information that helped us improve the live auction process.

THE KEY INGREDIENT: SPONSORSHIPS, MATCHES AND MAJOR DONOR ASKS

About a month before our first auction, one of our committee members suggested seeking sponsors for the event. That year, a few families became our first family sponsors, whose generosity increased our earnings by nearly \$2,000.

Our first auction netted \$27,000 and cost approximately \$5,000 to run. Seeing their hard work pay off, most of our volunteers were willing to do it again the next year.

Sensing the unrealized potential of auction sponsors, the next year we decided to focus our attention on obtaining more family sponsorships as well as continuing with our usual push for silent and live auction items. Families at the school were the most likely to give large donations to the programs, as their children would be directly affected by the gift. We chose to focus our attention on them versus trying to obtain outside sponsorships because we felt they would be much more likely to give. In our initial letter to the parent body, we asked parents to offer their support by 1) donating an item for the auction, 2) obtaining a business donation, or 3) becoming a Family Sponsor.

With a sponsorship of \$300, a family received two tickets to the auction (valued at \$100); \$200 of their donation went directly to

DISTRIBUTING THE WORK

Breaking the work into smaller bites, each managed by a subcommittee, helps the event run smoothly. The Auction committee worked in 24 subcommittees:

- Auction Committee Thank You Gifts
- Bid Sheets
- Business Cash Gifts
- Business License for Night of Auction
- Check-Out
- Classroom Projects
- Clean-Up
- Decorations
- Delivery of Large Auction Items
- Dinner Table Centerpieces
- Disbursement of Tax Deductible Receipts
- Donation Item Documentation
- Graphics
- Major Sponsorship Gifts
- Post-Auction Wrap-Up
- Posters
- Program
- Prop Construction
- Silent and Live Auction Set-Up
- Silent Auction Table Centerpieces
- Silent Auction Table Closers
- Slide Show Presentation
- Thank You Notes
- Wine Donations

support the Arts Enrichment Program. We offered higher sponsorships levels as well at \$500, \$750, and \$1,500. We put up sponsorship acknowledgment boards at the front of the school and we added names to the board daily.

Our second auction raised \$55,000, \$10,000 of which was raised before the night of the auction through sponsorships. Our third auction raised \$101,000, with \$20,000 in sponsorships raised prior to the event. Each year, we added higher sponsorship giving levels in addition to the original \$300 Family Sponsorship. The Family Sponsorship level allowed more families to offer their support and increased attendance. For those who could not afford \$300, we created a "Friends of Montessori" giving level, where families would be acknowledged for any size cash gift to the auction.

By the fourth auction, we had almost 100 sponsors who gave donations ranging from \$10 to \$10,000. We identified major donors by previous gifts they had made to the school's annual drive or capital campaigns or as general gifts. Prior to our involvement, most major donors had never been directly asked in person to give a large gift. By now, sponsorship had become a focal point of the campaign. Interestingly, people who sponsored the event also tended to bid generously at the auction.

Now the school director asked us to add fundraising for immediate financial aid needs at the school in addition to the Arts and Classroom Enrichment program. We expanded to identify donors who had a special place in their hearts for financial aid in addition to the needs we were meeting for funding for arts and classroom needs.

The fourth year, our goal was to raise the bulk of the money prior to the event. With our live auction bringing in close to \$40,000, we also thought there might be another opportunity for raising money we had previously overlooked. We set a goal to find a donor who would match funds raised through the live auction.

We knew of a major donor at the school who cared deeply about retaining an economically diverse school environment. She had begun the Financial Aid Endowment at the school. We had talked with her in the past about other needs that she supported at the school. We called and told her that there were financial needs at the school we wanted to talk to her about and invited her to join us for lunch. There, we asked if she would offer a matching gift to the live auction up to \$40,000 in support of the Financial Aid program. She agreed.

Our efforts to meet our auction goals were energized by this matching gift. The fourth auction raised \$165,000, with

matches and sponsorships totaling \$73,000. The live auction brought \$42,000, of which our donor matched \$40,000.

The next auction built on this momentum. With continued and increased sponsorships and matching gifts, our fifth auction realized \$167,000, with a total of \$65,000 in matching gifts and more \$35,000 in sponsorships earned in advance of the event. Each year we cast a wider net for sponsorships. As chairs, we asked our previous family sponsors to commit again to a gift. The auction committee wrote personal notes on the letters asking for auction sponsorships and made follow-up phone calls. We asked grandparents, local businesses, school vendors, including our bank and school suppliers. We also asked parents to supply us with the names of business contacts who may be interested in donating. Committee members also encouraged their friends to give. Because the event was so much fun, enthusiasm grew around the giving.

**THE SUCCESS OF
THE CAMPAIGNS
DEPENDS ON THE
RELATIONSHIPS
THAT DEVELOPED**

EVENT COSTS

The costs of running the auction increased after the first year as the event grew larger. We needed to rent a larger facility and catering and decorating costs expanded. By the fifth auction, more than 200 people attended from our school, with the amount donated to the auction averaging \$300 per person. Some people came and spent \$10, one person donated \$40,000.

Our total expenses were between \$25,000 and \$27,000 for each auction. We wanted to keep our costs down in order to retain the maximum amount of money for the programs. However, we did not want to sacrifice the quality and feel of the event and felt it was necessary to "spend money in order to make money." The caterer was the largest expense, followed by facility rental and wine purchase or corkage fees.

MAKING A CHANGE

We produced the auction for five years and it served as the main fundraising source for the school. As chairs, we were ready for a less time-consuming fundraiser. Though it was risky, we decided to try something new, built on our recognition that the lion's share of the funds raised by the auction came from the sponsorship money of our major and significant donors. We decided to cater our new event to these major donors.

With the fundraising committee of the board, we brainstormed the best ways we could fundraise for the two major needs at the school that the auction had come

to serve: the Arts and Classroom Enrichment program and Financial Aid. Since the major donor who had given \$80,000 to the Financial Aid program over the previous two years had just become an alumni parent at the school, we knew it would be prudent to develop other avenues to raise money for financial aid needs.

At the suggestion of the fundraising committee, the school's Parents' Club agreed to fundraise for financial aid through a separate event. We continued — and increased — our individual major donor asks for financial aid, supported by the school director, who came to most of the lunches at which we asked major donors for gifts. This year, the board chair will also participate in major donor asks.

At the same time we began to focus our efforts on our new fundraiser for the arts, the Winter Arts Dinner. We invited the parent community to support the arts with a sponsorship gift and then attend the winter event. The general sponsorship levels ranged from \$500 to \$5,000. We also received leadership gifts of \$10,000 and \$15,000. We also asked our major donors for matching gifts. Our leading matching gift was \$35,000. Other gifts ranged from \$25 to \$2,500.

Because the new event required a larger donation in order to attend, we instituted a new fundraising activity in the form of a raffle, so that any family could have a chance at winning a coveted classroom art project with a donation of \$1 or more. Other more inclusive parent events were also planned so that the parent body as a whole still had the opportunity for the social interaction that the auction had provided. This approach balanced the needs of the whole community while leaving us with an easier event to run and a month or two less work.

We were excited about the opportunity to highlight

the importance of Arts and Classroom Enrichment through one focused event. We concentrated all our efforts on creating an event that highlighted the importance of art in a child's education. We changed the venue of the event to a seaside resort not far from the school, offered a small silent auction of 100 carefully selected art-related items, and hosted a small live auction of only twelve items. All decor and entertainment revolved around the arts, in keeping with our case.

The Winter Arts Dinner was a success. We exceeded our fundraising goal and saw the parent community strengthen its resolve to support the Arts and Classroom Enrichment Program. Though the event resembled the earlier auctions, it allowed us to fine-tune our case for the arts. Where the auction had split the focus three ways among arts, financial aid, and classroom needs, in this event we were able to highlight the importance of art by creating an evening that made art the focus.

The past six years have shown us the value of having a strong case, the importance of thanking donors and volunteers in a personal and timely manner, and the prudence of exercising flexibility and sensitivity to the volunteer base balanced with the needs of the school community. The success of the Arts and Classroom Enrichment campaigns depended on the relationships that developed while working towards a common cause and sharing a vision for the school's future. **CF**

KRISTINE ALBRECHT AND CHRISTIANE CARMAN ARE THE VOLUNTEER DEVELOPMENT COORDINATORS AT SANTA CRUZ MONTESSORI SCHOOL IN APTOS, CALIFORNIA. KRISTINE ALBRECHT IS ALSO THE NATIONAL CHAIR OF THE NURSING MOTHER'S COUNSEL AND THE DEVELOPMENT COORDINATOR FOR ITS LOCAL CHAPTER. CHRISTIANE CARMAN RECEIVED TRAINING WITH THE JUNIOR LEAGUE OF LOS ANGELES, AND IS A BOARD MEMBER OF SANTA CRUZ MONTESSORI SCHOOL.

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Beyond the Basics:

THE **ROLE** OF THE **PRIMARY FUNDRAISER**

BY MARY HUMPHRIES

Surprising as it may seem, the following list of tasks are key elements of any fundraiser's job, fundamental roles that fundraisers should play. Too often these roles, however unintentionally, get overlooked. By "fundraisers" I mean those staff people who spend a significant amount of their time keeping an organization financially afloat. I would argue that these tasks are perhaps more important than the actual mechanics of raising dollars because they can save you time and money, ease your workload, and help you avoid costly mistakes.

So, I invite you to consider just how much time you are able to devote to the following roles:

- **Advocate:** Encouraging others to participate in fundraising — board, staff and volunteers
- **Teacher:** Mentoring junior fundraising staff
- **Architect:** Engineering a long-range fundraising plan that has been thoughtfully integrated with ongoing and yet-to-be launched programs
- **Leader:** Participating in long-range strategic planning and the development of your organization's budget
- **Analyst:** Evaluating the performance of fundraising initiatives to determine what's working and what isn't

Some fundraisers may be able to devote significant hours to three or more of these tasks. For others, perhaps two of the tasks get attention. Frankly, it wouldn't surprise me if you're only able to spend a few fleeting hours every other month or so working on any of these tasks because of other more compelling and seemingly urgent priorities. And there lies the rub.

When faced with the constant necessity of raising money — prospecting for members, writing special appeal



and renewal letters, conducting major gift campaigns, launching planned giving or monthly donor programs, and more — who has the time to think more broadly and strategically about the direction of an organization's fundraising program? And yet, by neglecting to spend time on the tasks inherent in these five roles, you're actually making your fundraising work harder, not easier. This

is true whether you're the harried executive director trying to juggle fundraising, program, and personnel duties or part of a four-person development office.

I should know. I spent six years as the development director of a regional grassroots conservation organization and successfully helped raise a lot of money during my tenure there — more than \$3 million. I was very good at planning, implementing, and executing a variety of fundraising strategies — everything from direct mail prospecting to house parties and major gift solicitations. But in hindsight, I see that what slipped off my radar screen time and time again was this: I never really thought about creating a healthy culture of fundraising in the organization; I never really thought about where I wanted today's new member to be in three or four or even five years; in fact I never really thought beyond the scope of the current annual budget.

Now, as a fundraising consultant to a number of nonprofit conservation groups in the North American West, I see the same pattern emerging in many of the organizations that I work with. It's not a bad thing — I know these groups have talented fundraisers who are very busy doing just that, "fundraising." But guess what? They could be raising more money were they to spend more time fulfilling the five roles I've identified.

THE CONDUCTOR

I believe today's primary fundraiser functions very much like a symphony conductor. Imagine yourself standing in front of the orchestra, baton moving gracefully up and down through the air. You've studied the music, you know all the parts that each instrument must play, and your job is to get them to play in unison, to complement one another.

So, too, in a nonprofit organization. It is your job to carve out appropriate fundraising tasks for all key institutional players — board, staff, loyal members, and volunteers — and to support each of these people so that they successfully accomplish their tasks. It is your job to know which fundraising strategies merit an investment of time, talent, and energy — something you can only know if you've done your analysis and long-range planning homework. And finally, it's your job to bring all these disparate parts together so that ultimately, jointly, you create a financially healthy and diverse organization.

But, like many things in life, this isn't an easy thing to accomplish. For example, how often have you tried to engage your board or staff in fundraising without much success? Who hasn't heard board or staff members remark "I don't like fundraising," or "I'm not any good at fundraising," or "I wasn't told I had to do fundraising when I joined this organization." Sound familiar?

And yet, consider the implications or, rather, the significant costs to the organization if all the fundraising devolves to one or two individuals. Those individuals now carry the full weight of keeping the organization financially afloat. The stress of that burden starts to manifest itself in longer and longer workdays, often accompanied by more and more "mental health days" or requests for extended vacations. Resentment and frustration build and the fundraiser feels increasingly isolated from the program work of the organization — in the eyes of their peers they often become the "money machine."

Under these circumstances, burnout is inevitable. How can a fundraiser both conduct an orchestra and play all the fundraising instruments at one time? It's impossible. It's also why so many talented young fundraisers quit their jobs and why some organizations seem to be perpetually churning through development staff. Furthermore, if the problem is not addressed — if fundraising becomes the exclusive domain of one or two people — the cycle starts all over again. Certainly, the organization is no further ahead from a fundraising standpoint, and arguably the group risks jeopardizing the loyalty and commitment of major funders and donors who see this regressive pattern repeating itself every two or three years.

**TODAY'S PRIMARY
FUNDRAISER FUNCTIONS
VERY MUCH LIKE A
SYMPHONY CONDUCTOR.**

WHAT'S NOT THE FUNDRAISER'S ROLE

With the foregoing in mind, let's now briefly look at those roles that fundraisers should not be expected to fulfill. You are not:

- **The money rescue brigade.** It is not your job to perform money-making miracles when sudden cash-flow shortages erupt. One organization expected its fundraiser to secure \$50,000 from major donors in three days when a pending grant fell through. This is unconscionable.

- **The only person responsible for raising money in your organization.** At the risk of belaboring this point, I mention it again because I believe the long-term fiscal health of a group is determined by the number of organizational fundraisers. Fewer fundraisers invariably means fewer dollars. Every organization, regardless of size, has board members and volunteers who can and should be enlisted to help with fundraising.

- **The lonely, neglected fundraiser who sits in a dingy office at the end of a long, dark hallway, completely cut off from the work of program staff.** I exaggerate, of course, but it's important to remember that fundraising is an integral part of program work and that strategic, long-range planning discussions must include fundraisers. If an organization — intentionally or unintentionally — pushes fundraisers off to the side, the message those people get is that they have

nothing very interesting or constructive to say. In fact, they have a great deal to offer and should be encouraged to speak up. For instance, if your organization is located in Alaska and you need to raise \$50,000 from major donors, most of whom live in the lower 48, you need to address some key programmatic questions,

such as, which if any of our programs has national appeal? what program message is most likely to resonate with our target audience? and, if we feature a particular program in our major donor campaign, how can we begin actively engaging major donors in that program work, thereby increasing their investment in our organization?

What exactly does all this mean in practical terms? Neatly summarized, it means creating a healthy culture of fundraising in your organization; understanding the relationship between the performance of fundraising initiatives, the fundraising plan, and your organization's budget; and developing a visionary fundraising program.

CREATING A HEALTHY CULTURE OF FUNDRAISING

To be successful in getting everyone to participate in fundraising requires a thoughtful deliberateness, careful observation, and good judgment. You need to think about

the fundraising skills or expertise that each key institutional player possesses and how to capitalize on those skills. Does a board member have excellent contacts in the corporate world? Could program staff ask people to sign up as members at slide show presentations? Does one of your loyal volunteers exude the passion and commitment needed to convince a major donor to make a substantial gift?

Don't expect everyone to perform the same fundraising role. Find out what people are willing to do and play to their strengths. The key to engaging people in fundraising is to obtain their "buy-in" so they feel a true sense of ownership and become invested in the outcome. Sit down with your board members over coffee and find out what fundraising assets they bring to the table. Let them tell you what they can comfortably do, be it hosting a fundraising party or securing items for an upcoming auction. Don't pigeon-hole people and don't present them with a plan in which their roles and responsibilities have already been defined — that will only aggravate and disempower your fundraising allies. Seek input from board, staff and volunteers, then craft your fundraising plan. What's more, with lots of people fundraising, you not only raise more money, you also strengthen institutional loyalty and morale. People will start to think of themselves as part of a team and will be far less likely to neglect their fundraising duties for fear of letting the team down.

Teaching others how to excel at fundraising is also a critical component of any fundraiser's job. In the conservation arena where I work, the turnover rate for fundraisers is high — and so is the learning curve. I consistently see new development staff enrolling in the same training workshops as their predecessors, sometimes three years in a row. What this tells me is that the knowledge and skills that are gained through professional trainings are rarely shared with other staff. This isn't deliberate, of course, but it has the effect of compromising, sometimes significantly, an organization's capacity to survive and thrive financially.

Why not instead take time now to teach other potential fundraisers or, if you are a small organization, other staff the fundamental skills they need to know. This will ease the fundraising workload and enable an organization to carry on with little or no interruption when the core fundraiser leaves. Groups with five or fewer staff will especially benefit from having other staff trained who can then bring a

new fundraiser — perhaps a new executive director — up to speed when the old executive director leaves.

PERFORMANCE ANALYSIS, FUNDRAISING PLAN, AND BUDGET

I'll be swift here. Know how much each of your fundraising strategies is costing the organization. Know your response rates, average gift amounts, renewal rates, mailing schedules, donor preferences, number of lapsed members, and more. When cost and time start to outweigh the benefits of a particular fundraising strategy, let it go and replace it with something else.

Be merciless in your number-crunching. Play an active role in the development of your organization's budget. Why? You'll be far

better equipped to draft both short- and long-term fundraising plans; make informed decisions about whether to pursue unexpected fundraising opportunities; provide excellent income estimates for renewals, special appeal letters, major gift campaigns, and the like; and be able to answer questions from the board or executive director without hesitation. Knowing your numbers will enable you to set ambitious but realistic fundraising goals and will earn you the respect and allegiance of your executive director and board.

VISION AND STRATEGIC PLANNING

Strategic planning is a critical exercise that gives fundraisers an unparalleled opportunity to demonstrate both leadership and vision. The process enables staff to establish the organization's priorities for the next several years, think "outside of the box," and identify where program work complements fundraising work and vice versa.

Let me give you an example. Let's say that your organization is debating whether or not to launch a five-year member-recruitment campaign. You have lots of questions to answer. Do you want your members to promote your mission more actively, show up at critical public meetings, lobby lawmakers, and write letters? Do you need an active

corps of volunteers? How many members do you want to have? Where will you find those members? How will you "grow" your membership over many years, and to what extent will building a membership increase your group's profile and make it a stronger, more influential, and more successful organization?

IT IS YOUR JOB TO CARVE OUT APPROPRIATE FUNDRAISING TASKS FOR ALL KEY INSTITUTIONAL PLAYERS

TEACHING OTHERS HOW TO EXCEL AT FUNDRAISING IS A CRITICAL COMPONENT OF ANY FUNDRAISER'S JOB.

Indeed, let's take this example one step further. Let's say that one of your organization's programmatic goals is to defeat federal legislation that would allow timber companies to log old-growth forests. You've identified allies in Congress who could be instrumental in torpedoing the legislation but you know they won't step up to the plate unless they hear first-hand from a significant number of constituents back home — the voters — that this legislation should be defeated. At the same time, your organization has set a five-year goal of increasing its membership by 50% and of raising 25% more from individuals over that five-year period. As a fundraiser, how would you best meet both the strategic programming and fundraising goals of your organization under this scenario?

Perhaps it's obvious, but the people you want to initially become members should also be the people who live in your congressional allies' districts. Target your recruitment efforts so that you attract the kind of new members who can write or phone or send an e-mail to their congressional representative telling them that they oppose the federal legislation to log old-growth forests. In fact, getting members to take action and then thanking them immediately for doing so is an excellent way to begin building a base of loyal and committed donors who will, if you continue to maintain good relationships, give more money to your organization over time.

Target strategically, acquire members thoughtfully, encourage member involvement, thank immediately, and maintain communication.

By playing an active role in strategic planning, the fundraiser is able to build a dynamic fundraising program — a program that reflects the organization's financial needs while helping to fulfill the organization's mission. And the elements of the program itself can be a mix of both conventional and cutting-edge strategies

The larger point is this: Strategic planning means deciding how the organization will prosper in the years to come. Without a solid fundraising component to nurture the organization as it grows, very little progress can be made. Your role as a fundraiser in this process is therefore critical.

WHAT'S IMPORTANT

In a world where we tend to focus on what is urgent but not important, I encourage you to step back for a moment and think about the tasks I've described above — the ones that are important but not urgent. These tasks define the role of a fundraiser today as much as (if not more than) possessing the knowledge and skills simply to raise money. Ask yourself to what extent you are a

teacher, advocate, architect, analyst, and engineer, and identify where you need to spend more of your time in fulfilling each of these roles.

Think about setting aside several days in the year — at least one or two days a month would be ideal — to give due consideration to long-range planning, setting direction, and evaluating strategies. Sit down and talk to

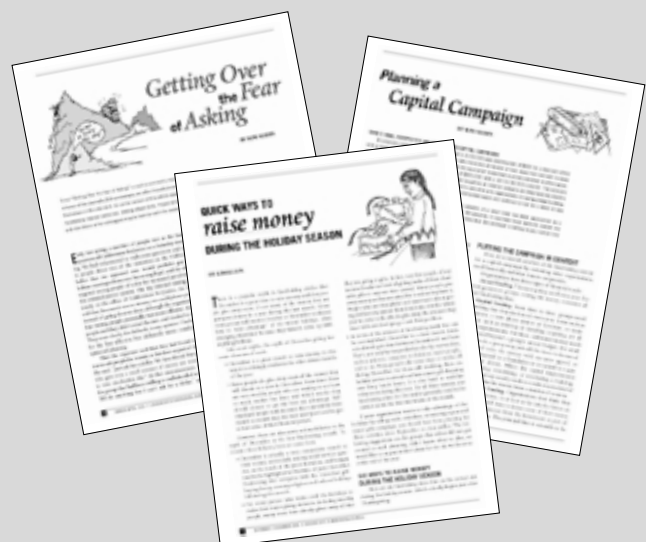
board members and staff to figure out how they can best participate in fundraising and continue to check in with them on an ongoing basis. Admittedly, this won't be easy, but the time invested in careful and strategic thinking today will pay enormous dividends for the organization in the months and years to come. **GFJ**

MARY HUMPHRIES IS SENIOR FUNDRAISING ASSOCIATE FOR TRAINING RESOURCES FOR THE ENVIRONMENTAL COMMUNITY. SHE CAN BE REACHED AT MARY@TREC.NW.ORG.

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“Outing” Overhead

BY KIM KLEIN

You may remember a controversial practice of the early 1990s called “outing.” As the name implies, someone would find out that a famous person was gay or lesbian and would “out” this person by telling the press. The purpose of “outing” was not primarily intended to hurt the person, but to make the statement that in order to change societal attitudes towards gays and lesbians, it is necessary that famous or well-respected public figures be open about their sexuality, thus leading to greater acceptance of all sexual orientations.

I think we now need to “out” administrative or overhead costs. Organizations have administrative costs. These are legitimate costs of doing business, and in fact, without enough money spent on administration and fundraising, the organization will not be healthy. Some organizations are able to raise a lot of money because they have figured out how to hide these costs — not because they don’t have them. Small grassroots organizations, on the other hand, sometimes appear to have high overhead costs because they tell the truth about how they spend their money, not because they waste money.

A constant obsession with many nonprofits is figuring out how to disguise the amount of their administrative overhead. Organizations often ask me questions like these: “If our fundraising appeal has an educational element, can we put some of the cost of it under program?” or, “Do we have to show rent as an overhead cost or can we divide it among all our projects?” Similarly, a donor told me recently that she gave \$5,000 to an organization that had promised her that none of her money would be used for administration. She asked me if I thought they were telling the truth. I told her they probably were, and the reason they were not going to spend any of her donation on administration is that they were spending 100% of someone else’s gift on that.

Ironically, some of the problems we have with being open and above-board about administrative costs come from foundations, many of which will only fund “program work.” This practice has long forced organizations seeking

grant funding either to disguise overhead costs as program or to raise overhead funds elsewhere. Many times, organizations would be well funded for a project while scraping to pay rent. Ironically, many of these same foundations are now protesting Congress’s efforts to increase their payout rate, furiously defending their costs and claiming that the quality of their grants program will go down if they have to dip further into their assets or cut costs. If nothing else comes out of this controversy, I hope that foundation program officers will take a more realistic view of the cost of doing business when they recommend proposals for funding.

Another reason groups try to hide what they spend on non-program costs is that they live in fear of being mentioned negatively in the papers. The press seems to love to write about nonprofit scandals, which include real scandals and then bogus “exposés” on overhead. Headlines such as, “Charities Could Save \$100 Billion,” or “Nonprofit Compensation Up,” or “A New Charity Watchdog Rises” give the impression that many nonprofits do not use money wisely.

More and more, donors are not asking what an organization does or what its mission is, but rather, “What percentage of my money goes to program?” They have been taught to be suspicious of how organizations use their money and told that the less organizations spend on non-program costs, the better they are run.

However, neither donors, nor foundations, nor organizations themselves have a firm idea of what percentage of budget is legitimate to spend on overhead. Is it the 35% recommended by the Wise Giving Alliance, or the 5% to 10% recommended in a Harvard Business Review article by Bill Bradley and the consulting firm McKinsey and Company (who previously consulted to Enron)? In fact, many charities and donors don’t even have a coherent definition of what overhead is. A donor wrote to me recently saying, “I have stopped giving to X organization because they had both overhead and administrative costs. I was willing to have one or the other, but not both.”

*Administrative costs
are legitimate costs
of doing business.*

ORGANIZATIONS WITH “LOW OVERHEAD”

We rarely read stories like the following, which indicate what happens to organizations that don't understand the value of proper administration. These are true stories disguised to protect me from the anger of each of the executive directors.

Organization A has three very committed social workers providing direct service to a much-too-large caseload. They are widely admired for their dedication. The social workers are compassionate and work well with clients. However, they cannot be bothered to fill out forms, write reports, or “deal with all that bureaucratic stuff,” which is what they call anything related to paper. Their reporting failures have caused the organization to miss several grant opportunities, resulting in the loss of thousands of dollars. The agency administrator works long hours trying to piece together the information needed for various reports, as well as balance budgets, pay bills, and run interference with funders. The organization is now in a budget crunch (predicted months ago by the administrator), and the board recommends laying off the administrator. “Cut overhead” says the board chair. “Our services are more needed than ever.”

Organization B has an executive director who loves “program work.” He does not like fundraising, writing reports or supervision. He has two other staff who are largely left to their own devices to figure out their work. One has figured out that he can steal upwards of \$2,000 a month in forged reimbursements, petty cash, and charging office supplies to the organization's account, then reselling them to other people for cash. Discovering an inordinate amount of money being spent on office supplies, the board treasurer suggests “cutting overhead.” It takes an audit a year to discover the truth. (By the way, an audit is an administrative cost.)

WHAT ARE ADMINISTRATIVE COSTS?

Certainly donors have the right to demand that their money be used properly. The question is how an organization can show donors that their gifts are being well used and educate the donor public about what to look for when evaluating groups' spending. In fact, organizations themselves need to know how to evaluate if they are spending enough or too much on overhead costs. What the donor deserves and what the organization wants is the same thing: for the group to use all their money as wisely as possible in the furtherance of their mission. To do that will require spending money on fundraising, evaluation, accounting, data entry,

and so on, as well as on more direct program costs.

The rest of this article is about ways to educate ourselves and our donors about administrative costs. First, some definitions.

Is there a difference between “overhead,” “administration,” and “indirect costs”? Perhaps someone with a Ph.D. in accounting can provide a more nuanced definition, but from the point of view of a lay donor, there is no difference. These words are interchangeable. My friend who was wasting her outrage on a group that had both administrative and overhead costs was confused because they used both those words in their financial report.

*A constant obsession
with many nonprofits is
figuring out how to disguise
the amount of their
administrative overhead.*

IS FUNDRAISING AN ADMINISTRATIVE COST?

Generally it is, although some groups talk about “administration and fundraising” and some donors will want to know what percentage of income is spent specifically on fundraising. An organization will want to keep track of fundraising costs so it can evaluate its fundraising efforts in order to decide which ones to expand, which ones to drop, and which ones to revise. (Cost is just one factor to take into account in these decisions, but it's an important one.)

So you want to pick a word and stick with it. In her excellent article, “100% Goes to Charity?” in the January-February 2003 issue of *Foundation News and Commentary*, Lee Draper writes, “*Indirect costs, overhead, and administrative expenses* do not convey the correlation of the expenditures to the quality and quantity of programming.” She suggests instead using words or phrases such as, “infrastructure expenses,” “core agency support,” or “organizational investment.” Choosing a new word or phrase to denote these costs may be helpful in changing your paradigm and that of your donors.

I like *administration* or *administrative expense* because of the Latin roots of those words: ad (to or toward) ministrare (serve). Administration is a service, a way of helping (ministering) to get the work done. Those who do administrative work are as important and helpful in serving the mission of the organization as any other staff person or volunteer. It takes a certain amount of administration to do any programming — it is a fundamental cost.

What are administrative costs? They are costs that are essential to the day-to-day operating of the organization. Administrative costs include

- **Fundraising:** development staff, donor relations, annual reports, newsletters, appeals and event costs, proposal writing, website development and maintenance, marketing

- **Finance:** bookkeeping, budgeting, reports to funders, annual audit
- **Office:** rent, utilities, postage, phone, fax, copy machine, computers, software, office furniture and supplies, cleanliness, safety and security, e-mail accounts
- **Support staff:** human resources, office management, salary and benefits coordination, reception, coordination of hirings, orientation, research on health insurance, workers' compensation, information technology, and the like
- **Board relations:** materials for meetings, meals, calls, planning and evaluation mechanisms and materials, support for the board chair, other reimbursements for board members
- **Other:** various for each organization, but might include licensing, storage, distribution, membership dues, travel arrangements, and the like

You may be thinking, correctly, "Much of these costs are required to do our programs" and then, incorrectly, "Why not just put some of them into the program budgets?"

There is nothing wrong with dividing administrative costs over your programs, and most of us will continue to do that as we write proposals and track costs. However, unless all your programs are the same size and you can easily divide the costs, it takes a huge amount of time to allocate administrative expenses.

I propose that over time we begin to change the way we show administrative costs. Since administration serves the programs, and these costs are important and legitimate, why not show them separately and educate donors and funders about them? Ultimately you will save time and money by not having to figure out percentages of this and that and wondering where you can hide this expense or what to call that one. These are the costs we need to save the environment, put on a play, educate our children, end racism, stop war, and all the other things we do.

EDUCATING DONORS

A large part of educating donors about how your organization spends money is to add some narrative to your numbers. So often in an annual report or even a budget report to a board meeting, the numbers stand on their own or are footnoted with cryptic phrases that are supposed to explain certain costs. For people who really understand budgets and are familiar with costs related to

running a nonprofit organization, these reports are like a short story — they are interesting and coherent. But for the vast majority of people who are either not good with numbers or not familiar with what nonprofits need to spend, the numbers are a mystery. A layperson trying to make sense of numbers just makes up their own story.

For example, in many programs salaries are the lion's share of costs. Over and over I have heard donors say, "They spend so much on salaries — can't they get volunteers?" Or, looking at a line item such as office supplies, "Can't people bring stuff from home?"

Here are some examples of adding narrative. One board chair wrote the following letter, which appeared in an annual report next to the letter from the auditor:

Dear Friends,

When I first came on the board of the Urban Green Project, I had no idea how to read an audit. I have learned a lot since then, and I always breathe a sigh of relief when the auditor gives us a clean bill of health, as he has this year. But these numbers mean so much more to me now than just showing we have spent our money legally and are following Generally Accepted Accounting Principles.

As an example, let me take just one cost: administration. We have one staff person, Sharon, who is the receptionist, bookkeeper, and grants administrator. She greets everyone as they come in, routes phone calls, answers or routes e-mail and mail, all while getting everything ready for the accountant and

making sure our foundation funders get the information they need.

When I went into the office yesterday Sharon was showing some senior citizens how to use the Web to find out what exactly is in the pesticide that was sprayed on the lawn of their assisted living facility and whether it could have made them sick.

When people ask us to separate administration and program costs, I think of Sharon. The fact is, there is no effective program without administration, and there is probably no effective administrator who is not interested in program work.

There are real stories behind all these numbers. I hope you will read our newsletter, visit our website, and feel free to drop by the organization's office. After all, the numbers on the income side of this report include your donation, and your donations are what finance the stories we have to tell. And our stories, added together, accomplish our goals.

Thanks again,
Board Chair

Another organization drew a line from each of its budget items on its financial report to a brief description

*Those who do
administrative work
are as important
and helpful in serving
the mission of the
organization as any
other staff person
or volunteer.*

of each line item. Here are some of them:

- Capital Improvement, \$17,000: Made our bathroom completely wheelchair accessible, which was the final barrier to accessibility in our office.
- Telephone, \$12,000: Translate that into 20 calls received every day looking for information and advice, 20 to 30 calls made by staff and volunteers every day setting up workshops, talking with experts, checking facts, finding out what is happening with various bills in the Assembly, getting price quotes, talking with donors. A total of 5,200 calls received and more than 4,000 calls made.

Administration is a behind-the-scenes cost, but it should not be a hidden cost.

- Information Technology (internet service, website maintenance, computer problem solving), \$2,500: With e-mail and the Web, we have been able to cut our phone bill in half while responding to questions and receiving information from all over the world. Here's just one e-mail exchange: A World Vision volunteer from Honduras asked a number of questions about lead paint. Since our manual, "Get the Lead Out," is on our

website, we can lead him to it much more quickly and far more cheaply than it would have cost to send him the report by mail. He translated part of the report into Spanish and then sent us his translation, in case we ever need it. Two days after we received his translation, we had a called from El Paso needing information in Spanish on lead paint removal.

These stories give some depth to the numbers, without requiring that the organization decide what percentage of the \$2,500 they spent on information technology should be allocated to program expenses and what percentage represents administration.

Realistically, of course, most nonprofits are going to have to continue to figure out what costs are administrative and what are program expenses. Sometimes the cost distinctions are obvious, sometimes they are arbitrary. But what we want to do over time is educate current and prospective donors about what we do and how much it costs.

We begin by educating ourselves to the fact that administration is as noble a cost as are meals for the hungry or counseling for the suicidal or organizing testimony to be given at the City Council meeting. Administration is a behind-the-scenes cost, but it should not be a hidden cost. And as with much of life, the quality of any organization's programs cannot be measured simply in dollars and cents. **GF**

KIM KLEIN IS PUBLISHER OF THE GRASSROOTS FUNDRAISING JOURNAL.

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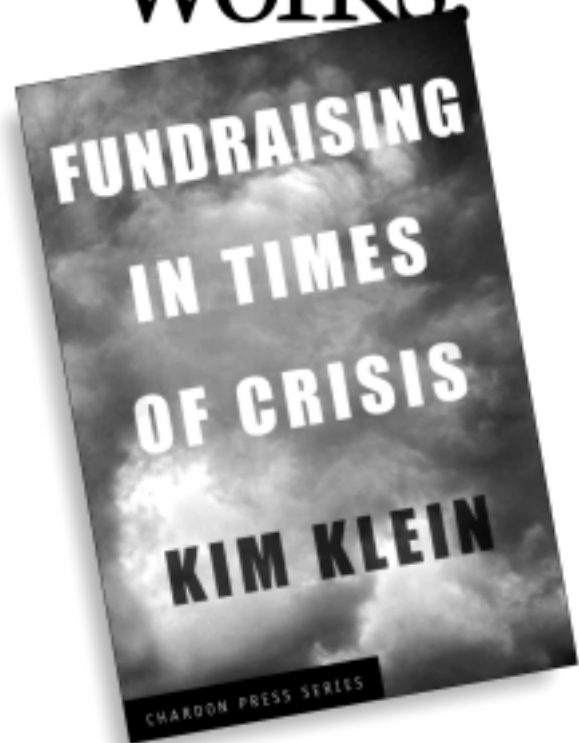
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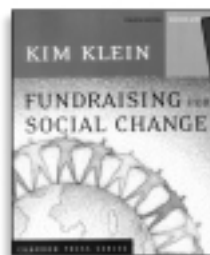
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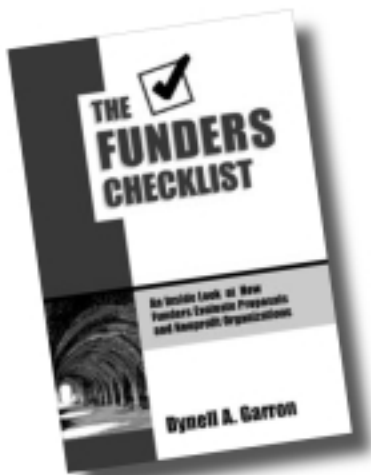


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