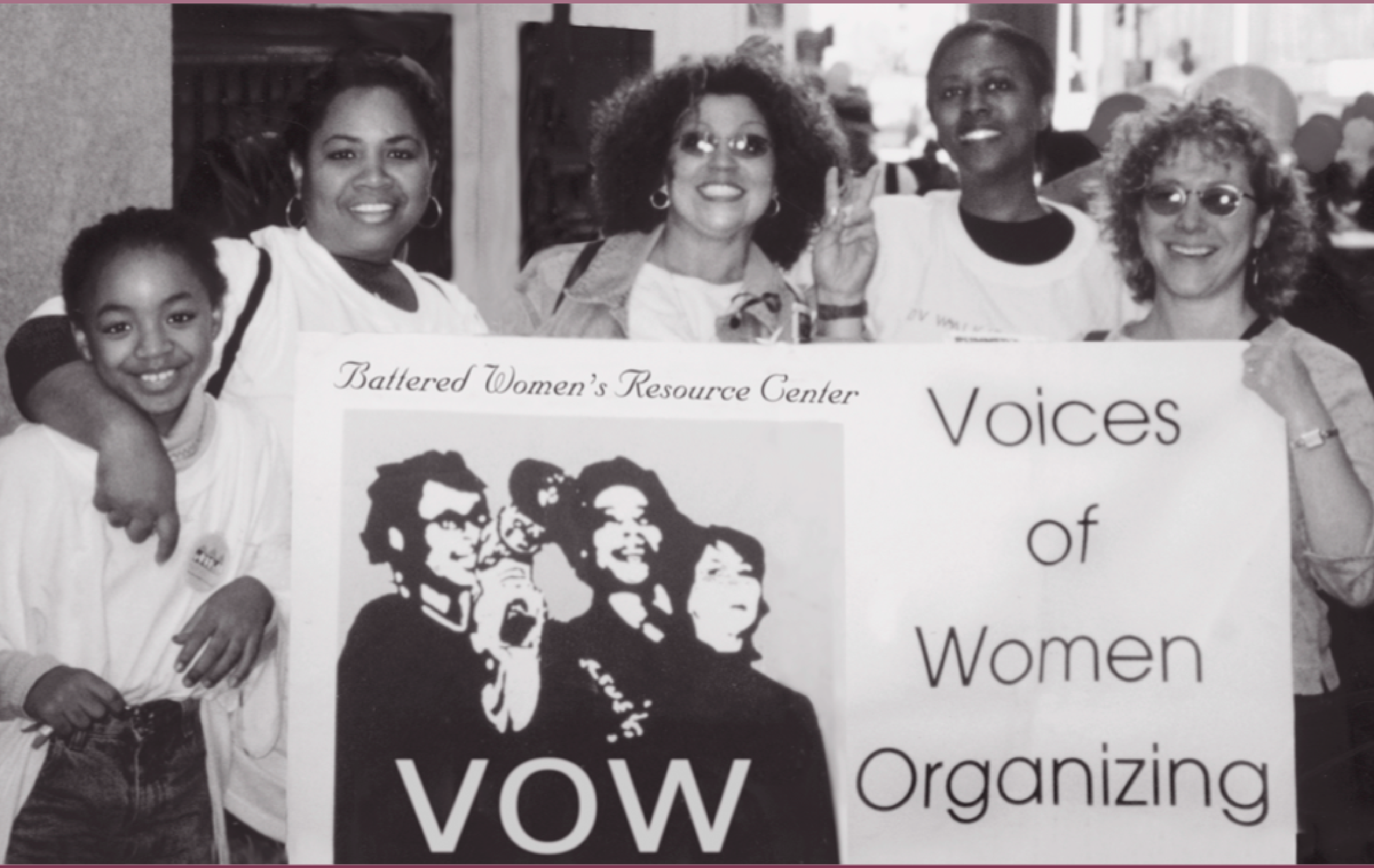
FUNDRAISING IDEAS THAT WORK!

Grassroots Fundraising Journal

VOLUME 23 • NUMBER 5 • SEPTEMBER/OCTOBER 2004

FEATURING: ***The Fundraising Letter*** BY KIM KLEIN



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LETTER FROM THE PUBLISHER

KIM KLEIN

In my last letter, I described some of the struggles we are having at the *Grassroots Fundraising Journal* trying to decide whether to continue to print the *Journal* on paper or to go virtual, with the *Journal* only on-line. I asked your opinion and I'm glad I did, because more than 20 people have responded with very thoughtful comments. Only one person wrote in favor of on-line publication. He felt it would be easier to forward articles to board members, and he indicated that he reads a lot of newsletters on-line now. Everyone else was quite opposed. Reasons ranged widely. One reader reminded me that a virtual format would make the *Journal* less accessible to the many subscribers who are on the other side of the digital divide. Several said they like to read the *Journal* on the bus or subway, and several more said they like to sit outside and read it on their lunch hour — as a nice break from their computer monitors.

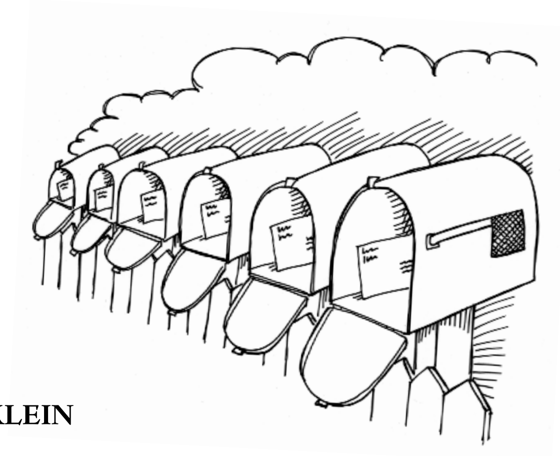
It's not too late to weigh in: e-mail me at kimklein@grassrootsfundraising.org or by snail mail to our address on this page. If you want, you can just write "Paper" or "Virtual" and I will know what your vote is even if I'm not privy to your reasons. Thank you to everyone who took time out of your busy days to respond to this.

The latest figures on private sector giving have been released by the American Association of Fund Raising Counsel (www.aafrc.org) in their yearly book, *Giving USA*. Giving from all sources came to a total of nearly $241 billion in 2003, up only slightly from the year before. As always, individuals accounted for the bulk of the money given, with living individuals giving 74.5% and gifts from bequests another 9% of the total. Foundations gave almost 11%, and corporations brought up the rear with 5.6%. (These proportions have stayed pretty steady over the 40+ years *Giving USA* has been published.) In the next issue of the *Journal* I will discuss these numbers and their meaning in much more detail.

In this issue, we have three articles that will help you get your hands on some of this money. In addition to my article on how to write a fundraising letter, Bill Vesneski and Nancy Adess share how to design and use surveys—an essential tool for good fundraising, as you want to know your donors and constituents. Finally, we reprint "Fundraising and Organizing: Sisters in the Struggle" as a tribute to Vicki Quatmann, who was a dear friend of mine, and also to remind us that fundraising must be integrated into all of our work if our organizations are to grow and thrive.

Don't forget that all available articles can now be purchased for the nominal price of $3 from our website, www.grassrootsfundraising.org. You'll also find more than a dozen articles for free there and a lot of other information to help you with your fall fundraising.

The Fundraising Letter



BY KIM KLEIN

Many people have used the insights gained from years of research on direct mail to make their letters of inquiry to foundations more interesting; others have used what they learned in writing heartfelt letters to friends to create effective mass appeals. Being able to write a compelling fundraising letter is imperative to being a good development director, but it's not as simple as it seems. This article describes how to write a fundraising letter that could be sent to one person or to hundreds.

Writing a good letter is only part of using mail as a fundraising strategy; the outer envelope, the return envelope, and the list to which the letters are sent are also critical components. Moreover, there is no point in sending a letter unless you are also able to send a thank-you note and keep good records so that you can ask donors again. But the letter is central to any effort involving mail.

The function of the fundraising letter is to catch attention and hold it just long enough for a person to make a decision about whether or not to give.

WHAT THE LETTER IS NOT

Keep in mind what a fundraising letter is not. A fundraising letter is not literature. It is not designed to be lasting, or to be filed away, or to be read several times with new insights emerging from each reading. It is disposable, and it is part of a culture acclimated, for better or worse, to disposable goods of all kinds — from diapers and cameras to contact lenses. The function of the fundraising letter is to catch the reader's attention and hold it just long enough for them to make a decision about whether or not to give. It may take you two hours to write it, but it will take your reader five minutes at the very most to read it!

WHO ARE YOU WRITING TO?

Think about the kind of people you are writing to. Be as specific as possible. For example, if you are writing to someone who is coming home from work, picking up the mail, figuring out what to make for dinner, making sure the kids are doing their homework, perhaps vacuuming or dusting while dinner cooks, your request will differ from a letter to a small business owner who receives the letter at work and reads it between phone calls or customers or while eating lunch at their desk. Both requests, however, have in common that the person does not have much time to figure out what you want and whether they want to give it to you.

Factor in the mood of the country. People are worried about an enormous range of things over which they feel they have little or no control — another terrorist attack, losing their job, paying their bills, the rising costs of health care, global warming, and so on. How crucial or relevant is your message given what else is going on in people's lives and in the world?

Keep in mind also that, unlike program officers at foundations who are paid to read proposals and letters of inquiry, recipients of a fundraising letter read the letter on their own time, for free, as a volunteer.

On top of all this, your letter arrives with anywhere from one to six other fundraising letters. What will make yours the one that is read and responded to positively?

THE PSYCHOLOGY OF LETTER-READING

You can see that a fundraising letter has a very difficult job and little power to do it. Using letters to ask for money, whether on a mass scale or in one-to-one personal appeals, requires reflecting on the psychology of letter-reading. Keep in mind the following three premises before you even begin to write:

1. When reading, watching TV or a movie, listening to a lecture, or even to a lesser extent listening to someone they care *about, adults subconsciously go back and forth between two questions.* The first question is, “So what?” If this question is answered satisfactorily, they move on to the next question, which is, “Now what?” This seesaw is a strong screening device for filtering out trivia, boring details, and rhetoric.

There is a saying in fundraising, "People buy with their heart first, and then their head."

To be sure, what is trivial or boring to one person may be profound or life saving to another, so the answers to these questions will vary somewhat from person to person. However, details about when your organization was founded or the permutations of your organizational structure may not pass the “So what?” test, and the myriad problems that led to your current budget deficit will only bring on a fit of “Now what?” questioning.

As you write your letter, imagine your reader asking at the end of each sentence, “So what? What does this have to do with me, my problems, or the people I care about?” If the sentence stands up under that scrutiny, then read the next sentence while asking, “Now what?” Does this sentence offer a solution, provide more information, create confidence in the group?

2. People have very short attention spans, particularly for the written word. A person should be able to read every sentence in your letter in six to fifteen seconds. Each sentence must be informative or provocative enough to merit using the next six to fifteen seconds to read the next sentence.

3. More than anything else, people love to read about themselves. This is partly because of the first point — the so what-now what questions. “What does this have to do with me?” is an underlying question. But it also reflects a desire to be treated personally. The reader of a fundraising letter wonders, “Do you know or care anything about me?” “Why do you think I would be interested in this?” “Will giving your group money make me happier or give me status, or relieve my guilt?” “Did you notice that I helped before?”

Therefore, the letter should refer to the reader at least twice as often and up to four times as often as it refers to the organization sending it. To do this requires drawing the reader into the cause by saying, “You may have read,” “I’m sure you join me in feeling,” “If you are like me, you care deeply about….” When writing to solicit another gift or a renewal from someone who is already a donor, use even more references to what they have done. “You helped us in the past.” “Your gift of $50 meant a great deal to us last year.” “I want you to know that we rely on people like you — you are the backbone of our organization.”

Of course, in the case of a form letter, the person receiving it knows it is not directed to him or her; but at a less conscious level, there is a belief that he or she is being addressed personally. It seems our subconscious cannot tell fact from fantasy and believes everything to be real. (That’s why dreams seem very real, and why affirmations work, and how you can make a child smarter or more graceful by telling her that she is that.)

Work with those three premises as you write your letter. Notice letters that you read and try to figure out why you take the time to read them. Notice also what parts of the letter you read, and why. As a consumer of individual fundraising letters, you are not so different from the people you will be writing to, so you already have some expertise about what makes a good appeal.

THE FORMAT OF THE LETTER

People generally read fundraising letters in a specific order: the opening paragraph (or only the opening sentence if the paragraph is too long), the closing paragraph, and the postscript. Up to 60% of readers will decide whether or not to give based on these three sentences and will not read the rest of the letter. The remaining 40% of people will skim the rest of the letter. Only a tiny handful of people will read the letter all the way through.

Given this pattern of letter-reading, you should spend most of your writing time on the sentences that are most read. Write the rest of the letter to make sense if skimmed.

The Opening Paragraph

Use the opening paragraph to tell a story, either about someone or some situation your group has helped, or something or some idea your organization has created or caused, or make the story about the writer or the reader of the letter. There is a saying in fundraising, “People buy with their heart first, and then their head.” The stories should be short and should end with something positive about your organization. Here are some examples:

Someone the organization worked with:

> Anthony made a really bad decision. On a dare, he stole a city official’s car. He was in a lot of trouble, but because he is only 17, the judge assigned him to the Second Chance Project. We are helping him use his ability to take risks to risk applying for scholarships to college and to dare to fulfill a childhood dream of being an engineer.

The letter goes on to describe the project and its philosophy of using the elements that get young people in trouble to get and then keep them out of trouble — boldness, desire to perform well in front of a group, and imagination.

Where the writer is part of the story:

> When I was a child, I went to the library every day after school. When I needed a job, I wrote my resume on the library's computer. When I needed to do research for my job, I did it at the library. Whenever I went, I found dozens of other people who were also using the library. All kinds of people from all walks of life. So, when city budget cuts meant cutting hours at the library, I said no. Hundreds of people joined me, and the library stayed open.

This letter invites people to continue this important work by joining Friends of the Library and is signed by a prominent community member.

Where the reader of the letter is part of the story:

> As a resident of Rio Del Vista, you were probably as shocked as I was to learn of the toxic waste dump proposed for Del Vista Lake last year. Working together, we were able to save the lake, but now the dump is proposed for Del Vista Canyon. We've got another fight on our hands.

Make the letter easy to read, with wide margins, decent-size type, and space between paragraphs.

The letter goes on to explain how and why this town must gear up and fight this dump battle again.

The Closing Paragraph

The last paragraph of the letter tells people what to do. It is specific and straightforward:

> Send your gift of $25, $50, $75 or whatever you can afford. Use the enclosed envelope — and do it today.

Or,

> Don't delay in responding. Your gift will be put right to work. We need it as soon as you can get it to us. Thanks.

The P.S.

The postscript ties people back into the letter by telling another story or offering an additional incentive for acting immediately.

A story:

> P.S. An independent study showed that the quality of our schools has improved because of Community Concern. It also showed we have a long way to go. For the sake of the children, please make your donation today.

Incentives:

> We have a donor who will give $1 for every dollar we are able to raise between now and October 1.

Or,

> We will send you two free tickets to our auction on November 7 if we hear from you by October 15.

The Rest of the Letter

The rest of the letter is used to tell more stories, provide back-up statistics, describe philosophy, and stress the need for money. The letter needs to be two to three pages long so that readers get the sense that you have enough to say, and that all of the information they might want is in the letter. This length also gives you room to make the letter easy to read, with wide margins, decent-size type, and space between paragraphs.

The tiny percent of response that we can expect from a direct mail appeal — 1 to 2% — shows how little power the appeal has. However, appeals do educate the public, raise consciousness, and plant the seed that your organization deserves to be supported.

By using mail carefully, you will not only gain new donors, you will also build a network of people who have heard of your organization and might support its work. GFJ

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

What Do They Really Think?

CREATING AND ANALYZING SURVEYS

BY WILLIAM VESNESKI & NANCY ADESS

When used effectively, surveys are a powerful tool that nonprofits can use to gather valuable information about their programs, activities, and services. This information can be especially helpful in tuning your fundraising to your membership and in finding more members based on who your current members are. This article addresses key issues involved in gathering information from a nonprofit's stakeholders and constituents through surveys.

PLANNING YOUR SURVEY

The most overlooked aspect of conducting a survey is thoughtful planning upfront. To ensure the success of your survey, consider the following key points before you write a single question:

Brainstorm What You Want to Learn from Your Survey

Gaining perfect clarity about the goals of your questionnaire is a critical first step. List your goals and ask others to review them. Some typical survey goals are:

- To gain a better understanding of the demographics of an organization's members.
- To identify strengths and opportunities for improving a membership program.
- To determine if those attending training workshops are satisfied with the trainers and the learning experience.
- To pinpoint what workshop participants learn.
- To learn about the effectiveness of your program activities

Review Other Surveys

Try to model your surveys or questions in them on those that have been used by other nonprofits. If you're concerned that your survey questions are confusing or don't gather the information you want, look for new ways to frame them. The Internet is chock-full of surveys and, although they are unlikely to address the same exact topic as your survey, you can look to them for inspiration in formatting and wording your questionnaire. Check out the following sites for some sample surveys and other helpful information:

- *www.eeoc.gov/federal/adr/evaluationforms.html* — A small number of U.S. government surveys
- *www.pareonline.net/getvn.asp?v=5&n=3* — An article describing hints for designing effective surveys; available for download
- *www.npower.org/tools/directory/eval/sample_npower+evaluation+surveys.doc* — Sample evaluation surveys used by one nonprofit; refer to these surveys for hints on question types and for organizing your questionnaire

Understand the Limits

Even the best surveys will not answer all the questions you have about a given topic. In fact, survey results frequently give rise to as many questions as they answer. If you understand the limits of surveys, you will be able to use other data collection strategies, such as interviews and focus groups, to help answer questions that surveys cannot. In general, as Richard Krueger, a noted evaluation expert, recommends, interviews and focus groups are more appropriate when you have the following goals:

Draft questionnaires should always be reviewed and pilot-tested by others.

- You are seeking to understand a range of ideas, attitudes, and feelings held by your stakeholders
- You are trying to understand different perspectives among groups or categories of people
- The purpose of your work is to uncover factors that influence opinions, behavior, or motivation
- You want to pilot-test ideas, materials, plans, or policies
- The audience for your research places high value on capturing stories and/or anecdotes

Think About the Respondent

As you create your survey, make sure your questions are easy to understand, logical, and can be answered easily. Draft questionnaires should always be reviewed and pilot-tested by others. Find out what your pilot-testers thought of the survey and solicit their feedback when making survey revisions.

ANONYMOUS AND CONFIDENTIAL SURVEYS

Too often surveys are anonymous when they really need not be. An anonymous survey is one that *does not ask for any identifying information whatsoever* from the person completing it. Only when the request is for very sensitive information, such as income or medical/mental health data, is an anonymous survey recommended. People are more likely to disclose very private information in a survey when they are not also asked to identify themselves in any way.

In all other cases, confidential surveys are sufficient. When conducting a confidential survey, you can comfortably ask for identifying information, including name, state of residence, or e-mail address. This will enable you to monitor who has and has not completed the survey and it will allow you to track response rates more easily. However, because the questionnaire is confidential, the survey administrator (the person managing the survey project) is *not permitted to share or disclose any of the identifying information to others.* So, for example, in a confidential survey the names of respondents should never be linked to any quotes or responses that might appear in the survey report.

In addition, when conducting a confidential survey, your organization should have a policy that identifying information will not be shared among internal employees or volunteers. Only the survey administrator(s) should see and have access to this information. If the survey administrator wants to share the information, they can simply strip the identifying data from all the survey results before sharing them with fellow employees or volunteers.

USING SURVEY INCENTIVES

Some people object to using incentives in survey projects because they believe incentives are prohibitively expensive, lead to biased data, or "buy" a survey-taker's response. When incentives are used correctly, however, none of these things are true. Here are some ideas to consider when deciding whether to use an incentive:

Low Cost

Incentives need not be expensive or elaborate. They can be donated by a local business or be low-cost items routinely distributed to your organization's members/stakeholders, such as bumper-stickers, pins, or pens.

Lack of Bias

Survey takers rarely interpret an incentive as motivation for providing "positive" survey responses. If you use a modest incentive, there is no reason to think that it will lead to biased results.

Respect for Respondents

Those who complete surveys, like all of us, tend to be very busy; few truly enjoy the experience. By providing a small incentive we thank, honor, and respect respondents who take the time to provide our organizations with critically needed information — especially when they are under no obligation to do so.

> By providing a small incentive, we thank, honor, and respect respondents who take the time to provide our organizations with critically needed information.

More Results

Research about survey-taking behavior has conclusively shown that incentives lead to increased response rates. This is the most significant reason to use them!

Here are two alternative strategies for using incentives:

Distribute the incentive along with your survey. This is the most effective way of increasing response rates. If you are conducting an Internet survey (more about these later), you can offer a document or publication as an incentive that your respondents can download from the Internet (and that they might not otherwise have access to). Otherwise, snail-mail the incentive out and refer to it in any electronic communication you send to those taking your survey.

Hold a drawing. If you have a limited number of items to use as an incentive, you can hold a drawing from among those who complete the questionnaire. Just be sure to mention the drawing in your initial invitation letter (see below). Certificates for modest sums (say, $10) to a local business are becoming increasingly popular survey incentives. For example, if you are able to dedicate $50 to incentives, you can hold five drawings for five $10 gift certificates.

USING ONLINE SURVEYS

Because increasing numbers of a nonprofit's members and stakeholders have e-mail addresses, more and more of us are using online tools to survey these individuals. These tools allow you to design a survey and manage its dissemination online, and they enable respondents to complete a questionnaire via the Internet. When you close your survey, you can download the collected data in spreadsheet form.

In general, online survey tools are easy to use, decrease the effort needed to manage survey projects, Greetings:

Nature Unlimited needs your help. We are very interested in knowing what you think of your membership in our organization and our efforts to preserve America's natural areas. To help us achieve this goal, we are conducting a brief survey of all our members.

Please take this opportunity to share your honest and candid opinions with us. Your survey responses will remain completely confidential — neither your name nor other identifiers will be included in any reports or materials prepared from the collected responses. A final compilation of all survey statistics will be e-mailed to all Nature Unlimited members in December 2004. A copy of the survey is attached to this email as a Word document.

Please note: Please complete your survey and return it by Friday October 22, 2004.

You can fill out the attached survey and return it by e-mail to info@natureunlimited.net or you can print out the survey, fill it in, and either fax it to (503) 555-1212, or snail-mail it to 555 NW Mountain Rd, Portland, OR, 97219. Alternatively, you can complete an online version of the survey at: *www.zoomerang.net/natureunlimitedsurvey.*

As a small thank-you for your time, you will be entered into a drawing for one of three $15.00 gift certificates from Powell's Bookstore.

If you have any questions about the survey, please don't hesitate to contact John Smith at (503)555-1212 or by e-mail at johnsmith@natureunlimited.net.

Thank you for your help!

avoid manual data entry, reduce waste and paper usage, and save an organization money over the long term. You can find two of the most reliable and popular online survey tools used by nonprofits at these sites:

- Survey Monkey *(www.surveymonkey.com)*
- Zoomerang *(www.zoomerang.com)*

Both tools are comparably priced (approximately $200/year for 1,000 surveys) and each has a variety of pricing packages. Before making a purchasing decision, visit each tool's website and talk with your colleagues who use them. If you cannot afford a subscription to one of these services on your own, consider sharing the cost (and account) with others.

Although online survey tools are very helpful, their use does not eliminate the need to create a survey in a word-processing program. In fact, you should create and format your survey in Word or a similar program before ever putting it online. Once created, you can fax, e-mail or snail-mail the survey out to those individuals who do not have ready access the Internet.

INVITING PEOPLE TO TAKE YOUR SURVEY

Perhaps the most critical step in a survey project is sending out a message inviting people to complete your survey. This message not only needs to convey important information about how to take the survey, it must also motivate people to complete it. Overall, your invitation should contain the following information:

- An explanation of the purpose of the survey and how the information gathered from it will be used
- Whether the survey is confidential or anonymous
- The due date for completing the survey
- Instructions for returning completed surveys
- Whom to contact for information or questions about the survey
- Whether respondents will receive a copy of any reports prepared with the survey data

At left is a sample e-mail message inviting the members of "Nature Unlimited" to complete a questionnaire about the organization.

As you can tell from this message, the Word version of your questionnaire should be attached to your e-mail invitation, even if you are also using an online tool.

Although it is preferable to have people complete a survey online because it avoids your having to enter the data into a spreadsheet, you don't want to miss a survey response because someone doesn't have access to the Internet. As a result, you should provide people with a variety of means for obtaining and completing your surveys and allow them to use the method that is most convenient to them.

FIGURING RESPONSE RATES

For many surveys, especially those sent to an organization's members, it is entirely reasonable to expect a 25% to 50% response rate. Remember, the response rate reflects the number of *accurate* home or e-mail addresses you have. Bounced back messages and returned snail-mail letters *should be subtracted* from the total number of surveys sent out. Here is the formula for figuring your response rate:

	Number of Surveys Sent:		________
SUBTRACT	Number of "Bad" Addresses:	–	________
TOTAL	**Number of Surveys Actually Received**	=	________
	Number of Surveys Responded to & Returned to Us:		________

SURVEY TIMELINES AND REMINDER SYSTEMS

It is not enough simply to send a questionnaire out and hope for the best. Getting a good response rate takes time and a well-considered reminder system.

To get the best possible return rate allow one full month from the launch of your survey to its closing. During this period, send two reminder notices to non-responders and extend the survey deadline once. Here's a sample survey timeline:

- *Day 1:* Launch survey with a 20-day deadline.
- *Day 10:* Send reminder notice.
- *Day 20:* Extend survey deadline to day 30.

• *Day 25:* Send final reminder notice.

• *Day 30:* Close the survey.

As you can see, the deadline extension is accounted for in the timeline and, as a result, is only a reminder notice in disguise.

Finally, if possible, avoid sending reminder notices to people who have completed your questionnaire. If your survey is not anonymous, you will be able to identify who has not completed it and you can send reminder notices only to these individuals. Always be sure to include a copy of the survey with your reminder notices. Below is a sample e-mail reminder/extension message that you can customize:

> Greetings:
>
> A few days ago you were asked to complete a survey about our membership program. We haven't yet heard back from you.
>
> Your feedback is critical to the success of our survey and we hope you will take a few moments now to complete it. (A copy is attached as a Word document.) You can complete the questionnaire and e-mail it to us at info@natureunlimited.net or fax it back to (503) 555-1212. Alternatively, you can fill out an online version at the following Internet link: www.natureunlimited.net/survey.
>
> ***Your candid and honest feedback is very important to us.*** Please know that your responses are confidential and no identifiers of any kind will be used in the final survey report. In order to provide sufficient time to complete the survey, the deadline has been extended to October 29, 2004.
>
> Don't hesitate to contact John Smith at (503) 555-1212 or by e-mail at johnsmith@natureunlimited.net if you have any questions or concerns.
>
> Thanks so much for your help!

CONSTRUCTING YOUR SURVEY

Once you have planned your survey and identified a timeline, you are set to write the questions. Try to limit the length of your survey to 20 questions. Often, surveys are longer than this because they include repetitive or unnecessary questions. Only ask questions for which you have a very clear understanding of how you will use the responses to it when analyzing the data. When you have a first draft, assume it is too long and look for questions to eliminate.

Like other written documents, surveys should also have a logical flow with a beginning, middle, and end:

Beginning: The first three to five questions of your survey should be easy to answer. Avoid asking for opinions or suggestions in these early questions. A request for basic identifiers (name, state of residence) are good opening questions, as are those that ask respondents how they learned of your organization and which of its services/activities they have participated in.

Middle: The middle 10 questions tend to be the most focused and substantive of a survey. It is in this section that you should place questions requesting opinions and attitudes. The middle of surveys also tend to be where the most challenging, emotionally charged, or complicated questions are asked.

End: The last three to five questions end the survey-taking experience. You should be sure to include a question in this section that asks respondents if they have any final comments.

No matter the length and organization of your questionnaire, it should always include a mix of open- and closed-ended questions. Each of these question types is described in the following sections.

Using Closed-Ended Questions

Closed-ended — or rating — questions, such as those that ask people to rate how strongly they agree or disagree with a statement or to select from multiple choices, are easy both to respond to and to analyze. Here are a few tips when using rating questions in your surveys:

Ratings Scales: Research has shown that there really is not a "right" number of points for a ratings scale. The most frequently used scales are 5, 7, and occasionally 10 points. When in doubt, use a 5-point scale. In general, only use a 7- or 10-point scale when those taking your survey have a very subtle or nuanced understanding of the question's subject and when all of your respondents share this understanding. If those taking your questionnaire have different levels of knowledge about a question's subject, use a 5-point scale.

Neutral Options: Avoid including a "neutral" option. It is entirely appropriate to force respondents to make choices when completing surveys. Those who research survey-taking behavior believe that most of us have an opinion about nearly everything. Few people are truly neutral on a given topic, and when they are, their neutrality is frequently a proxy for lack of knowledge. The use of odd-number scales will help avoid neutral options.

Labeling Data Points: It is not necessary to label all of the points on your scale. However, you must label the anchors (the highest and lowest points). (You can download a list of labels for ratings questions from *www.trecnw.org* in the section "Evaluation Resources.") The following are typical sets of labels:

• Very Poor, Poor, Fair, Good, Very Good

• Never, Occasionally, Somewhat Often, Very Often, Always

• One of the Worst, Below Average, Average, Above Average, One of the Best

• Very Dissatisfied, Somewhat Dissatisfied, Fairly Satisfied, Satisfied, Very Satisfied

• Not at All, Slightly, Moderately, Very, Extremely

Anchor Points: Place the lowest anchor on the left and the highest on the right. So for example, if you have a 5-point scale asking someone to rate how good a training was, at a minimum you should include the "Very Poor" label at the 1st point on the far left and the "Very Good" label at the 5th point on the far right. (See the example below.)

Precise Language: Be sure that the labels on your scale match the language in your question. For example, if you are asking someone how helpful a particular service is, your scale should equate 1.0 with "Not at All Helpful," not "Not at All Useful," nor "Not Satisfactory."

Try to limit the length of your survey to 20 questions.

Using Open-Ended Questions

Unlike closed-ended questions, open-ended questions spur free-thinking and brainstorming on the part of survey-takers. These questions enable you to probe for more detail. Here are examples of some typical open-ended questions that might appear on a survey:

- What do you like most about your membership in Nature Unlimited? Please be specific.
- What do you like least about your membership in Nature Unlimited?
- What barriers stand in the way of your becoming more active in Nature Unlimited?
- How can Nature Unlimited become more effective?
- What do you wish Nature Unlimited did differently? If possible, please provide examples.
- What else would you like us to know about Nature Unlimited?

In addition, you can ask a closed-ended question as a follow-up to a open-ended question. For example:

How strongly do you agree with this statement:
"Nature Unlimited is working effectively to reach its mission?"
(CIRCLE ONE)

STRONGLY DISAGREE				STRONGLY AGREE
1	2	3	4	5

ANALYZING DATA FROM OPEN-ENDED QUESTIONS

Analyzing open-ended data (also known as qualitative data) is easy and fun. It simply requires that you identify key patterns or themes in question responses. Here are four steps to follow when analyzing responses to open-ended questions:

Read (and reread) all of the responses to the questions. As you review the responses you will see key themes emerge from the data. Be sure to list each theme by giving it a title and briefly explaining its meaning. This list of titles is called your "code book."

Code the responses. After you have created your code book, go back to the responses and label each one according to its theme. (Researchers call this process "coding" qualitative data.) Keep in mind that one survey response may actually reflect more than one theme.

Identify frequency. Count the number of times a key theme appears in your responses and list these frequencies in your code book.

Provide examples. Select two or three survey responses that best reflect and exemplify the meaning of each theme. You can use these quotes (without identifiers) in your survey analysis.

The University of Wisconsin has developed a very useful publication about closed- and open-ended questions that you can download at *http://cecommerce.uwex.edu/pdfs/G3658_2.PDF*.

PRESENTING SURVEY RESULTS

After closing your survey, document your findings in a short two- to three-page report, and distribute this among staff and key stakeholders. It is very important to present your results in an easy-to-read fashion. Each type of question (closed- and open-ended) lends itself to a different method of display.

Presenting Averages, Percentages and Counts

Averages, percentages, and counts obtained from closed-ended questions are best presented in tables. Your tables should have titles, and they should always include the number of responses to a particular question. It is best to list items in declining order. Here are examples of tables displaying closed-ended data:

Survey Respondents by Membership Type

MEMBERSHIP TYPE	NUMBER RESPONDING	PERCENT*
Super Members	98	49.5
Best Members	61	30.8
Good Members	39	19.7
TOTAL	**198**	**100**

*PERCENTS REFLECT ROUNDING.

Satisfaction with Nature Unlimited's Work on Environmental Issues

ISSUE	NUMBER RESPONDING	AVERAGE RATING
Protecting natural places	171	4.8
Safeguarding water	168	4.5
Taking on sprawl and population growth	172	2.1

SCALE EQUATES 1.0 WITH "NOT AT ALL SATISFIED" AND 5.0 WITH "EXTREMELY SATISFIED"

Presenting Key Themes and Examples

Key themes and examples from open-ended questions should be presented in brief paragraph format. In your survey report, describe the key themes and the number of times they appeared, and provide the reader with representative quotes. The following passage might appear in your survey report:

Respondents were asked to "discuss the two things you liked most about your experience" as a Nature Unlimited member. This question yielded the richest and most complete of all survey responses with 117 individual replies. Analysis of the responses revealed two key themes, each of which is described below:

Membership provides useful information about environmental issues in the region (65 comments). The strongest theme to emerge from the survey data focuses on the valuable information and resources members receive from Nature Unlimited. In particular, respondents appreciated how Nature Unlimited's information was easy to access on the Internet and how it brought environmental issues to life. Typical survey comments include the following:

"Opened my eyes to so much new conservation information and what I could do to help protect wildlands."

"The info was accessible to someone who does not normally pay attention to environmental issues."

"I learned valuable tools to enhance my ability to advocate for conservation."

Strong staff (42 comments). Survey respondents indicated that Nature Unlimited staff members were responsible for much of their satisfaction with membership. Respondents praised the staff members' knowledge of their respective subjects, their organization, and their strong communication skills. Among the comments are:

"The staff are interesting, dynamic and knowledgeable."

"Each of the office personnel are professional, knowledgeable and sincere in their commitment."

With planning and attention to detail, you can significantly improve the number of surveys returned to you and the quality of the information they contain. GFJ

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In Memoriam:
Vicki Quatmann

JUNE 25, 1941 – JUNE 16, 2004

Social justice movements in the United States and Bolivia have lost a very special individual, Vicki Quatmann. Vicki died suddenly on June 16th in the mountains of Bolivia from a heart attack. I, along with hundreds of her friends, family and colleagues, was shocked and saddened by her untimely passing.

I met Vicki Quatmann in 1980. She was working at Save Our Cumberland Mountains (SOCM), which longtime readers will recognize as one of my favorite organizations. Located in Jacksboro, Tennessee, SOCM is a grassroots, Tennessee-based organization that works on issues related to land use — particularly strip mining — along with job development and racism. Vicki was SOCM's fundraiser for 14 years. We became fast friends and colleagues as Vicki began to teach as well as practice fundraising. She understood completely the central role that fundraising plays in an organization's ability to grow and thrive and the need to be supported by a broad base of individual donors in order to stay focused on mission.

I moved to Tennessee in 1986 to be the director of the Appalachian Community Fund; Vicki was the first chair of the Fund's board. Under her leadership, the Fund went from being a delicate and fledgling organization to a fixture on the philanthropic scene, taking up the left-wing slot among Tennessee foundations.

In addition to our work together, Vicki and I biked, hiked, and went canoeing. She introduced me to the Loretto Community, a Catholic order of both vowed and lay members dedicated to the pursuit of justice and peace and the service of others, where I have made my spiritual home ever since.

Vicki was drawn to anything beautiful — nature, music, textiles, books. She not only appreciated, but threw herself into beauty. She spent weeks outdoors canoeing the boundary waters of Minnesota, she frequently rode century (100-mile) bike rides, she sewed and knit quilts, skirts, sweaters and more by the carload and gave them away to friends, family and as premiums to donors. She hiked in the many hills and mountains of Tennessee, Kentucky, and North Carolina. And she touched thousands of people's lives through her work and her avocations.

After SOCM, Vicki worked with the Southern Empowerment Project, where she taught fundraising to social change activists all over the South. At the end of her time there, she put together a wonderfully inventive and engaging fundraising manual for volunteers — in the form of cartoons. Called "You Can Do It!" she made sure that the manual came out in both Spanish and English.

Vicki left Tennessee two years ago to follow a dream of living and working in Bolivia, where she had lived many years before. She spoke fluent Spanish and was learning Quechua. In Cochibamba, she helped to start cooperatives so that the very poor people she worked with could see some financial gain from their many talents.

I will miss her more than I can even imagine.

Among Vicki's many contributions to the work of social justice was making explicit the connection between fundraising and organizing. As a tribute to her, and as a reminder to all of us of the deep and essential relationship between those two activities so vital to making social change happen, we reproduce the following article she wrote for the *Journal* in 1994.

— *Kim Klein*

Organizing & Fundraising: *Sisters in the Struggle*

BY VICKI QUATMANN

After 14 years of fundraising for a community organization in the mountains of east Tennessee, I have some observations to share about the ways that fundraising and organizing need to work more closely together to build people power.

From 1979 until 1993, I was the fundraiser for an Appalachian community organization called Save Our Cumberland Mountains, better known as SOCM (pronounced SOCK-EM). I had initially been hired to answer the phone and be available in the office as backup to six organizers who were busy outside the office, but fundraising tasks kept coming my way. Since I had come to SOCM because I wanted to be an organizer, I watched the work of the organizers closely.

Slowly, I learned the meaning of the word "organizing" and the intricacies of the strip mining and surface rights issues that SOCM was already famous for addressing during its short seven-year history. I learned that the job of an organizer is to make it possible for people to work together for what they believe in. It is about gaining control over decisions about new industries, jobs, landfills, strip mines, water, taxes, and schools that can make a life-and-death difference to the future of small, rural communities. It is about making elected officials accountable to us, the taxpayers who pay their salaries.

Understanding organizing was intoxicating. It made sense to me — more sense than all my past years of summer volunteer work doing service to needy people through youth camps, cheese lines, and free day care.

I learned that a good organizer never does *for* the people she is working with; rather, she shows them how to do for themselves. A good organizer doesn't speak at the public hearing; rather, she helps those upset about the incoming strip mine to prepare their own testimony and practice their own speech. A good organizer is never found quoted in the press but rather sees to it that the press contacts the local people concerned about the strip mine and helps them prepare their own words for the media.

I learned that a good organizer lays out possibilities and challenges the people to try all the strategies that have been successful elsewhere in similar fights, and before the final strategies are chosen, backs away and lets those people directly affected by the promised strip mine decide how much they are willing to risk in their fight to stop it. Organizers don't tell people, they ask.

I saw organizers push people into taking action by refusing to do it themselves. I worked with organizers who knew that if they did it themselves, they would erode the very foundation of the people-power they were trying to build. I learned that an organizer has done a first-rate job when he is forgotten at the end of a successful legislative campaign and the members are proudly owning the victory, claiming they did it themselves.

Cesar Chavez, one of the great organizers of this century, said that people are infinitely more appreciative of what they do for you than what you do for them.

Good organizing is about ownership. It's about providing people with the opportunity to become aware of their own capabilities and potential. In fact, a good organizer, if successful, turns each person she meets into a temporary organizer. Cesar Chavez, one of the great organizers of this century, said that people are infinitely more appreciative of what they do for you than what you do for them.

I saw that good organizers must be astute people-readers. They recognize the person who can "spare a little time" who is actually ready to give it all if only someone would ask them. They recognize when the moment is right to put someone to work, knowing that if they don't, they'll lose them for the cause. They are always looking for commitment. They want to grab that first spark of interest and give it a job. Then they move that person to more steady involvement — regular meetings, phone tree, help with research. Eventually, they move the person to the kind of commitment that can only be made with risk and total awareness, the kind that moves a person to speak out publicly on issues dividing their local community or to take responsibility as chair of the local chapter or a position on the board.

When an organizer position came available on a campaign opposing the Department of Energy's irresponsible disposal of hazardous waste in the ground and streams surrounding Oak Ridge, Tennessee, I applied for it. As I worked on the campaign over the next two years, I learned an even deeper respect for what it takes to be a good organizer — strong commitment, sharp intelligence, bulldog persistence, an ability to work with people, and a sense of humor that keeps it all in balance.

Show the membership how true ownership and control begin with owning the resources that power their own organization.

Two years into my organizing job, the person who replaced me as fundraiser left on two weeks' notice, throwing my old job back into my lap along with the organizing. Our search for a new fundraiser dragged on and on. Though good organizing is every bit as difficult as good fundraising, there are hundreds of people who believe they can do the one and not the other. I chose to return to my old fundraising job with a renewed sense of purpose and insight into what I was supporting, and SOCM hired another organizer.

TWO SIDES OF THE COIN

Along with the organizers, my job as the fundraiser was to be out there asking, asking, and asking some more — challenging the membership to greater commitment through their financial gifts; showing them how true ownership and control begin with owning the resources that power their own organization. I became excited about my part in the work. For the first time I proudly identified myself as a fundraiser.

One of my favorite sources of inspiration during my years of fundraising for SOCM was a little booklet titled *Axioms for Organizers* by Fred Ross, Sr. I read it often and simply substituted the word "fundraiser" for "organizer." Try it yourself. Substitute "fundraiser" for "organizer" in the section above where I speak about what I learned about good organizing.

As my years at SOCM fled by, SOCM celebrated its 10th, then its 15th, and then its 20th anniversary. Each anniversary became the occasion for making stronger demands for support on SOCM's constituency. At the 10th, pledges per mile on an 1,800-mile canoe trip by one of the senior staff set the occasion for the first serious big-dollar asks. At the 15th, we built a small "Can Do It Fund" to pay for corner-turner opportunities in the midst of rough campaigns. For our 20th, we established our first endowment, a "Year 2000 Fund," and solicited three-year pledges from every member of the organization.

As a fundraiser, my job was to get a donor's first gift. We call it an impulse gift. Often the organizers got it in the form of the annual $10 dues. Then I set up opportunities that encouraged giving at other times during the year so that the new member-donor might become a habitual giver. Finally, someone from the organization (myself or another staff member or another SOCM member) asked the member-donor to give a significant gift, one that required risk and a serious level of commitment. (Does this sound like organizing?)

I dreamed of a whole army of member volunteers who might join in asking other members to make that step toward serious ownership through a significant gift to SOCM. The staff and I weren't a big enough asking force. Besides, a friend or a neighbor in the community who has made the same commitment is better heard, more respected.

I wanted people to give at a level that moved them away from saying, "You people at SOCM ought to…" to "We ought to…" I wanted them to feel, through their donations, that they were in charge, they owned and had real say over their organization. I dreamed of the day that the greatest part of SOCM's support would come from this membership and supporters, not from foundations.

I have taught fundraising to future organizers at the Southern Empowerment Project, where I use an exercise describing a major paper company about to locate in an area that has been primarily dependent on tourism. The weak local chapter of an existing community organization has decided to fight location of the plant. I lay out, in detail, the geography, sociology, politics and economics of the specific area that will be affected. Then I split the group into two. One half is to be organizers and plan the strategy for how to address this devastating intruder; the other half is to be fundraisers and decide how to raise the $20,000 that the first year's campaign efforts will cost.

Both times I've tried this exercise the organizer group has been amazed at the powerful potential that the fundraising plan has for broadening the constituency committed to the campaign. In fact, it has been generally true that the fundraising plan, more than the organizing plan, has incorporated the greater effort to broaden the commitment to a greater number of people. The organizing strategies tend to quickly become heavily focused on research and similar strategies that depend on a few skilled leaders.

All the skills used by good organizers are the very same skills used by good fundraisers. Both organizers and fundraisers must be sensitive people-observers. Both must be intensely aware of the potential activist's/donor's self-interests and how those interests mesh with the overall group's goals. Both must be willing to ask the potential activist/donor to make a commitment — of time and/or money — and to take a risk in trusting the integrity of the organization. Both must know how to inspire confidence, convey to the activists/donors that their contribution is extremely important, and show regularly how that contribution is making an important difference.

INTEGRATING FUNDRAISING AND ORGANIZING

If good organizing is about deepening commitment, no aspect of the campaigns our organizations address will be more effectively served than by our good work to pay the costs. A strong base of constituent support that is giving at its capacity and helping to increase that support in an organized annual campaign is the most important ingredient in assuring our organizations' financial stability and long-term future. A big pool of donors is like a major savings account and organizational pension plan rolled into one — and far more reliable and predictable than any single foundation grant. The effort to build such a pool contributes more to the organizing mission of our organizations than a million-dollar grant from a foundation.

Why not have an equal number of fundraisers as we have organizers? Maybe we could partner each fundraiser with an organizer. Or, why not agree to train all organizers to be effective fundraisers and that there is no longer a distinction? The latter may be the tougher road. Changing old ways isn't easy. That leads me to another "why." Why do we let our organizers get away with claiming that they have no time to raise money in the midst of an intensely hot issue? We know we are kidding ourselves! There is always time for one more sentence with each person we are working with. "Will you give $___ to support this effort?" "This effort for this year will cost $___; how will you be helping to pay for it?" No time is better for raising the money that will cover the cost of a campaign than during the hottest moments of the fight! Organizers know that the time when an issue is most deeply felt is when they will get the greatest time commitments. It should be no surprise that the same holds true for fundraising.

It is time for our organizer training schools to teach organizers everything about fundraising and fundraisers everything about organizing, recognizing that the two are equally critical to the health and future of our grassroots social justice groups. It is time for all of us to stop departmentalizing and make fundraising an integral part of the everyday organizing work of each employee and leader of our organizations. GFJ

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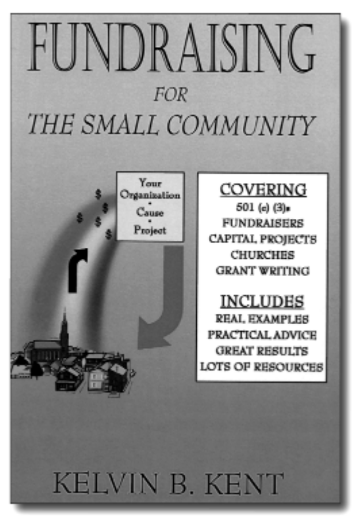

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