FUNDRAISING IDEAS THAT WORK!

Grassroots Fundraising Journal

VOLUME 24 ▪ NUMBER 2 ▪ MARCH/APRIL 2005

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PUBLISHER
Kim Klein

EDITOR IN CHIEF
Stephanie Roth

SENIOR EDITOR
Nancy Adess

PRODUCTION MANAGER
Nan Jessup

ADVERTISING COORDINATOR
Jennifer Emiko Boyden

BOARD OF DIRECTORS
Shelana deSilva
Charlie Fernández
Netsy Firestein
Miguel Gavaldón
Fred Goff
Helen Kim

GRAPHIC DESIGN & PRODUCTION
Cici Kinsman/C^2 Graphics

COVER PHOTO
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PHOTO OF STEPHANIE ROTH
Mónica Hernández

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(510) 596-8160 (SF BAY AREA)
FAX: (510) 596-8822
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www.grassrootsfundraising.org

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LETTER FROM THE EDITOR

STEPHANIE ROTH

Even those of us who raise money for a living sometimes worry that we're an annoyance to our donors. We often have to remind ourselves that not only do people like to give away money (in the United States alone, they gave $179 billion in 2003), but that giving money can be an important and empowering act.

The recent devastating tsunami in South Asia is a case in point: witness the extraordinary outpouring of support from people around the world.

In the United States, soon after people gave so generously to the November 2004 election campaigns, they have given millions of dollars more for tsunami relief efforts. An article in the newspaper told of a cab driver in New York who was donating 30 percent of his earnings to organizations doing relief work in his home town in Somalia, which was seriously damaged. A 10-year-old boy asked his parents to return all his Christmas presents so he could donate the money to victims of the tsunami.

There's a lesson here for those of us struggling to raise money year in and year out: when people are moved by an event or cause, they will dig deep and give generously. Studies of giving in the U.S. have shown that although 75 percent of the population has *no* disposable income, 70 percent of the population gives money to charity. Why do people give? To reach beyond themselves, to connect to a larger community, to regain some sense of control after events as devastating as the tsunami. It's a way to join with others to say, "Yes, let's work together to make a real difference, a difference that none of us can make by ourselves."

The next time you hesitate to ask your donors, friends, members, allies, and community for money, ask yourself why you are making the decision *for* them that they wouldn't want to give. Consider that you might be sending an unspoken message that you don't really need their support, that your work can be accomplished without the participation of as many people as possible. What would it mean, instead, to look for *more* opportunities for people to build an organization, a community, a truly broad-based movement that can accomplish the kind of social change many of us feel we can only dream about.

The articles in this issue of the *Journal* bring this discussion of how we relate to donors (and potential donors) to a practical level. Teresa Erickson, executive director of the Northern Plains Resource Council, writes about the impact of an employee embezzling a huge amount of money from her organization, and how having a group of long-term, loyal donors helped them survive. Patrick McLean makes a compelling case for developing relationships with local elected officials, and Sandra Francour describes one group's success with creating a monthly pledge program, illustrated by their wonderful, creative printed materials. Finally, publisher Kim Klein reviews a new and useful book on producing fundraising auctions.

How We Survived

AN EMBEZZLEMENT

BY TERESA ERICKSON

PUBLISHER'S NOTE: I am a long-time and unabashed admirer of the Northern Plains Resource Council and by extension, of its staff, including the author of this article. When Teresa called to tell me about the embezzlement she describes in this article. I immediately reassured her that these things happen in the best-run organizations, that this crime was not her fault, and that it did not reflect badly on the organization.

Nonprofits and small businesses operate on a high level of trust among staff, along with a number of common sense financial controls. Most of the time the combination of trust and controls works well. This is the story of a time when the controls didn't work and the trust was betrayed.

What often doesn't happen when a crime is committed at a nonprofit is the willingness that Teresa demonstrates here to tell other nonprofits about what happened so they can perhaps save themselves from having to learn the hard way. So many organizations add to the burden of the crime their own silent embarrassment. Teresa shows us that this is neither necessary nor helpful.

For me, a key lesson of this story is that the pressure nonprofits face from donors and funders to keep overhead costs down is what often allows a clever thief to operate for months and sometimes years.

— Kim Klein

The test of an organization's mettle is not during the good times. Rather, it is when facing great challenges — and last year our mettle was tested. I am the Staff Director of a Montana nonprofit organization, Northern Plains Resource Council. For the past 33 years, we have organized citizens to protect water quality, family farming and ranching, and our quality of life. In this article I share our experience of discovering and surviving a terrible embezzlement and explain how we responded to it, and as a result, how we became stronger for it. I certainly hope that no other nonprofit will have to go through such a painful experience and that the insights we learned might help others avoid having to do so.

In the first few days of January 2004, our organization discovered, by accident, that our trusted bookkeeper had been embezzling money from us for three years. Our discovery of the theft was a huge blow and a terrible shock to all of us on many levels. First, the thieving might have gone on much longer except for the fluke discovery; second, the extent of the loss was huge; and third, and perhaps most devastating, there was a deep sense of betrayal from someone with whom we had worked side-by-side for three years. This woman, a sixty-something grandmother, had seemed to be a true supporter: she donated items to our silent auctions, she even taught some of our employees how to knit and crochet. Unknown to us, she was also addicted to gambling.

Struggling to get past the shock, we began to work to simultaneously determine the scope of the theft, put safeguards in place against future occurrences, and recover from the circumstances with as much of our work intact as possible.

At a special meeting, our board adopted a strategy and took on many of the tasks to ensure our safe recovery. In essence, the strategy involved the following actions:

- *Immediately instituting internal controls to prevent embezzlement from ever happening again*
- *Contracting with a CPA firm to conduct an audit*
- *Assembling a team of volunteers to review and reconcile all bank statements during the period of the embezzlement*
- *Implementing a complete recovery plan*

THE RECOVERY PLAN

The recovery plan needed to help us ensure that we could continue operating while dealing with the realities of the embezzlement. The plan set out the following steps:

- *Delay or reduce non-essential expenditures so we could continue with issue work.*
- *Communicate to our membership, leadership, donors, and allies what happened, that the organization was going to be okay, and that we have protected ourselves from this happening again.*
- *Institute internal and external controls.*
- *Step up grassroots fundraising efforts.*
- *Seek restitution through our bonding insurance policy, a civil suit against the embezzler, and negotiations with our bank.*

The personal dedication of the Northern Plains Resource Council's board and staff made the difference in how we responded to the embezzlement.

UNDERSTANDING HOW THIS COULD HAPPEN

Although we found out as we went along that embezzlement is far more common than we realized, we also learned which of our own practices had left us open to it.

First, like many nonprofits, we feel a tremendous pressure to get the most for our donors' dollars. We constantly worked to reduce overhead and administrative costs in order to put more money into program work. When it came to financial controls, spending less money was not a good strategy.

Second, for thirty years bookkeeping had not been a problem at Northern Plains. Like many nonprofits, we had traditionally operated at a high level of trust. We did have internal controls in place — our bookkeeper didn't handle money, couldn't sign checks, and couldn't transfer funds. Even with these safeguards, however, she managed to carry out the embezzlement by forging checks, falsifying important financial documents, and generally creating a maze of systems to cover her tracks. We found that we did not have enough independent verification of the general ledger and financial statements.

During the time we were being embezzled, we had two financial reviews done by two independent CPA firms, one in 2000 and one in 2002. Neither detected the theft because of the limited nature of a financial review as opposed to a full audit. We chose financial reviews over audits because of the large difference in cost. This choice turned out to be pennywise and pound foolish. We thought financial reviews would detect a problem, but nothing short of a thorough audit would have caught this well-disguised thievery.

And while it wasn't much comfort, we learned from the county attorney fraud specialist that as many as 50 percent of nonprofit organizations, small businesses, and churches in Montana are vulnerable to the kind of theft we suffered. Our own experiences bore this out. After we reported the theft to our membership and the public, several organizations that contacted us to find out how we did our books were employing bookkeeping methods similar to those that had left us at risk.

We were dismayed to discover in this process that embezzlement is actually rather common. We began to notice articles in the newspaper describing embezzlement at other nonprofits, including a church, a United Way chapter, a Girl Scouts affiliate, and small businesses. At one Montana nonprofit the embezzler even burned down a building in an attempt to destroy evidence of the crime.

As we made personal phone calls to major donors to inform them of the embezzlement, we were surprised when the great majority told us of their own experiences confronting fraud in their businesses and in other nonprofits with which they had been involved.

IMPLEMENTING THE RECOVERY PLAN

Once we had the recovery plan outlined, we immediately set about implementing it. Many things had to be done virtually simultaneously: revising the budget, communicating with staff and supporters, instituting better internal and external controls, and ramping up our fundraising.

WHEN IT CAME TO FINANCIAL CONTROLS, SPENDING LESS MONEY WAS NOT A GOOD STRATEGY.

Tightening Our Belt

We first carefully created, adjusted, and monitored a cash flow projection. This became the guide that told us when we could spend, that let donors know when our need was greatest, and that helped us through the ebbs and flows of the cash inflow and outflow.

We were determined to continue our work.

Northern Plains has a long history of getting a lot of impact out of every dollar. We are skilled and experienced at being frugal. After reviewing the 2004 budget carefully, we found several areas that could be trimmed without materially affecting our work. Rather than cut program, we made changes that included producing our publications in black and white instead of full color, reducing the number of newsletters we produced, and asking our contract attorneys and expert witnesses to work pro bono or for greatly reduced fees during this extraordinary time.

We are proud that not one of our 15 staff positions was cut, our field travel budget remained intact, and we continued to fund all programs and affiliates. We were able to move forward without making draconian cuts because of the diversity of our fundraising: we had lots of reliable membership money coming in every month, we had several foundation grants in the pipeline, and we had time left on a couple of two-year grants. Moreover, we had slowly built up a reserve fund over the years, which we decided to spend to keep program and staff going. We looked carefully at our cash flow and saw that if we really tightened our belts and dramatically stepped up our fundraising, we would be able to raise our budget — though not restore our cash reserve — over the next year.

Telling Our Members

Telling our members was an immediate and high priority, as well as a huge task that none of us looked forward to. Here are the steps we took:

- ***We held a staff meeting to announce the news to the staff.*** We assured them that we had looked at our financial situation and would do everything we could to prevent layoffs. We asked them to continue on with their work. We outlined with them how to talk about the embezzlement with our members and the public.
- ***We called all the board and committee members.*** We decided personal contact was the best way to explain what happened.
- ***Within 10 days of discovering the embezzlement we sent a letter to our entire membership.*** We wanted them to hear it from us before they read about it in the paper. (See letter at right.)
- ***We made personal phone calls to key community leaders, major donors, and foundations.*** We explained what happened, described our recovery plan, and solicited their ideas about what we should do.
- ***We reported the embezzlement and our progress in recovering from it in our newsletter.***

The response from the membership has been more than gratifying. Over the last several months I, along with other staff and leaders of the organization, have had the opportunity to talk with many members and donors personally about this unfortunate situation. I have been amazed and heartened by the unwavering support from our members and the energy with which our staff and board members have rallied to meet this challenge.

With only a few exceptions, the overwhelming response from the membership has been one of hope and resolve to make Northern Plains a stronger organization, to ensure that this will never happen again, and to help the conservation community learn from this experience so that other organizations will be protected. Personal communication was a key component in this response.

> January 15, 2004
>
> Dear Northern Plains Member,
>
> I hope this letter finds you well in this new year. We had a great year in 2003 — making major gains on deeply felt and important issues. Regrettably, I have some unfortunate news to tell you.
>
> Last week, we discovered that our former bookkeeper betrayed our trust and embezzled money from our organization. While there will undoubtedly be newspaper accounts, I wanted to make sure you heard from us how this crime affects our organization.
>
> I want to assure you that we are still able to continue our very important and successful work. We are already working on plans to fill the gap so that this incident won't affect our 2004 operating budget.
>
> We filed a police report and are cooperating fully with law enforcement authorities and are aggressively pursuing restitution. Fortunately, we have insurance and are filing a claim. In addition, we have immediately instituted procedures to prevent this from ever happening again.
>
> Our endowment and building funds are safe and unaffected. We have met and will continue to meet our financial obligations. While this is a heavy blow, we have met difficult challenges before and will get through this too. We remain strong in our resolve to protect family farmers and ranchers, water quality — and to ensure that Montana is a good place to live and work.
>
> The police investigation is underway, so I cannot discuss details of the case. Thank you for your understanding, and thank you for believing in Northern Plains and the work that we do. On behalf of our staff and Board, we appreciate your confidence and encouragement during this difficult time.
>
> Sincerely,
> Mary E. Fitzpatrick
> Chair

Establishing Better Internal and External Controls

With the help of a committee of the organization's leadership, staff, and a CPA, we developed a set of internal controls that work for a nonprofit office our size. These controls have made our handling of money more professional, official, and of course, safe. However, they also take more time, and more duties have been divided up among staff and leadership. Internal controls need to be thought through carefully and committed to earnestly; they are only effective to the extent they are workable for an organization on a day-to-day basis.

As soon as we discovered the embezzlement, we set out to find a qualified firm to prepare a full audit in a timely manner. We were fortunate to find a CPA firm that specializes in audits and was not delayed by it being tax season. Most accounting firms would have had to wait until tax season was over to begin our audit, and we couldn't wait because our credibility was on the line.

We will now budget for an annual audit. We are working with the auditor to explore ways to train some of our leaders to collect some of the information needed as a way to lower auditing costs.

Ramping Up Fundraising

While we have always tried to practice what we've learned from Kim Klein, Valerie Ruether, Jean McCord, and other wonderful fundraising advisors and trainers, now we put our skills into high gear. Our leadership is stepping up more than ever before and agreeing to take on substantial responsibilities for donor solicitation. Necessity has helped many of them overcome their fear of fundraising. We are also increasing the amount of training and preparation time for these brave souls.

A high priority has been placed on building our asking team so that we have enough people to personally approach all our bona fide prospects. We found that we have been able to increase our revenue from donors substantially. It is important to note, however, that *we are not asking people to give because of the embezzlement, we are asking for people to give strictly because of the work we need to do.* Our biggest constraint on fundraising has always been the amount of time it takes — both staff and member time. When the whole organization's life was at stake, people made the time.

Prosecuting the Thief

Even though we knew that it would become public, it was important to report the crime to the police. People often hide this kind of crime because of the humiliation that comes with it and the fear that enemies realize you are in a weakened condition. Yet it is critical that groups name the crime for what it is. If they don't, they just set the person free to do it to someone else. Embezzlers are usually people with serious problems that are similar to addiction — they will do it again and again until they get help or they get put into jail. We now know that most embezzlers that get caught have done it before.

> WE DID HAVE INTERNAL CONTROLS IN PLACE — OUR BOOKKEEPER DIDN'T HANDLE MONEY, COULDN'T SIGN CHECKS, AND COULDN'T TRANSFER FUNDS.

WHAT WE HAVE LEARNED

The lessons from this experience are many. Following are the greatest:

- ***When a crisis like this happens, tell the truth to your members.*** Some groups hide an embezzlement because of the humiliation they feel at being victimized. But it's important to remember that those who support you deserve to know what happened. For a membership-based organization, we couldn't have handled it any other way.
- ***Be sure that independent bank reconciliations and other, random verification of invoices and receipts are done on a monthly basis.***
- ***Keep in mind, however, that financial reviews or other limited accounting procedures, unless specifically directed to find fraud, do not replace the value of a regular audit.***
- ***Conduct yearly audits, whether done by members and affirmed by a CPA firm or conducted entirely by a CPA firm.***
- ***Reinforce to board members their fiduciary and legal responsibilities to the organization.*** We have now broadened our board orientation and training to emphasize these aspects.
- ***Make sure your financial and administrative employees share the values of your organization and meet the same philosophical requirements as program staff.*** If they care about the health of the organization and the outcome of the issue work, they are not likely to be dishonest.
- ***Management staff as well as volunteer treasurers need to be trained, not only to understand and explain financial statements during board or annual meetings, but to verify that the information is correct.*** Without much additional work, a volunteer could perform a monthly random check into vendor invoices, bank statements, and other verifiable documents.
- ***A state or town with substantial gambling will inevitably attract people with addictions and financial problems.*** These people come in all shapes, sizes, ages and attitudes. Know about the background of employees who are in positions of trust, including their credit and police records. An addiction to gambling will make people dishonest.

- ***Good administration and financial controls are expensive — and they are worth it.*** As nonprofits, we should not disguise or apologize for the cost of audits, separation of duties, and top-notch financial advice.
- ***As Kim Klein and others have long emphasized, building relationships is critical in building and funding an organization.*** When we became victims of embezzlement, our thirty years of face-to-face relationships translated into deep loyalty at the time we most needed it.

WHEN WE BECAME VICTIMS OF EMBEZZLEMENT, OUR THIRTY YEARS OF FACE-TO-FACE RELATIONSHIPS TRANSLATED INTO DEEP LOYALTY AT THE TIME WE MOST NEEDED IT.

The power of positive feedback and encouragement is enormous. If the leadership and membership had responded negatively to our situation, it could have made our recovery much more difficult. The outpouring of support and sympathy made it bearable for the staff and leaders and allowed us to focus on moving forward instead of being paralyzed from the shock of our situation.

SUMMARY

Northern Plains Resource Council is going to be okay. We are stronger for this experience, and our organization will keep strengthening. We are delivering on every commitment we've made to our donors and our members, even if we did so with fewer bells and whistles: substantively, we had a hugely successful year in our issue campaigns despite the embezzlement. We hope that those who are upset with us for the embezzlement will ultimately judge us on how we respond to this enormous challenge.

Our experience has prompted us to sound the alarm to the conservation and social change community about strong internal controls and financial management. A report produced by the Great Falls Montana United Way states that in Montana most fraud in nonprofits is detected by a suspicious coworker or is caught by accident. Only 15 percent of fraud is caught by internal controls. Still, organizations that have grown beyond a small budget and staff must invest in the best practical internal controls.

Audits must be done annually and CPA firms directed to search for fraud when conducting an audit or financial review. Organizations will need to raise more money to pay for the audits and for enough administrative staff to prevent and detect fraud. Your board can be a valuable asset in reconciling bank statements and other tasks to check on potential fraud. Fraud-prevention measures must be discussed regularly with your bank.

While this nightmare was revealing itself to us, there were a few sayings that brought me comfort. If you ever find yourself in a similar situation, these few simple thoughts may help to keep you strong and moving forward:

- *In showbiz, it's not the mistake, it's the recovery that counts.*
- *What doesn't kill you makes you stronger.*
- *Turn your tears into strength.*

TERESA ERICKSON, STAFF DIRECTOR OF NORTHERN PLAINS RESOURCE COUNCIL, CAN BE REACHED AT TERESA@NORTHERNPLAINS.ORG.

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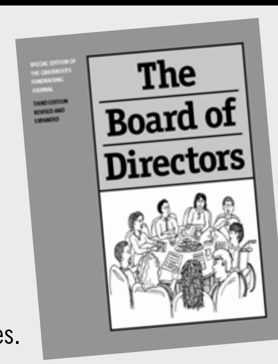

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Monthly Donors: *A Success Story*

BY SANDRA FRANCOUR

This article describes a particularly successful giving program at Spirit Rock Meditation Center. Spirit Rock, located just north of San Francisco, provides Buddhist-oriented meditation training and teachings through classes and residential retreats to explore compassion and awareness and to bring greater peace into the world.

In the first ten years of its 17-year history, fundraising at Spirit Rock focused mainly on securing funds to acquire a 412-acre parcel and to build a residential retreat center there. Two very successful grassroots capital campaigns raised well over a million dollars — but that's another story!

Due to the capital-intensive nature of the organization, a formal annual campaign (one direct mail appeal each spring) was begun only nine years ago. This was followed by adding a second direct mail appeal (fall) four years later in 1999. The annual campaign grew gradually, showing the typical response and retention patterns for direct mail. In 2000, a more formal major donor campaign was begun and, with careful crafting and nurturing over the years, continues to meet with very good success. A third annual direct mail appeal (winter) for the Spirit Rock Scholarship Fund, added in 2002, has been reasonably successful.

With more than 32,000 people coming through the gates at Spirit Rock each year, the development department is continually searching for creative, innovative ways to appeal to a widespread spiritual community for support. Thus we began researching the hottest new type of fundraising in late 2002 — monthly giving.

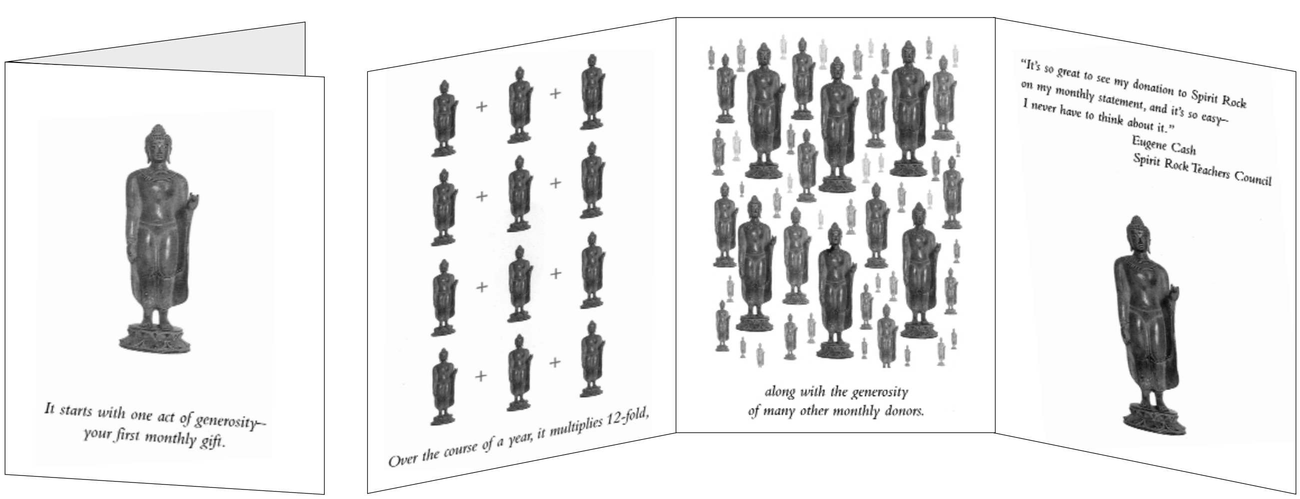
We looked at the monthly giving programs of several pioneer organizations and quickly decided to offer automatic monthly debits (from credit cards or direct bank transfers) instead of a system of sending envelopes with pledge reminders. Despite the greater benefit of doing only bank debits, we felt that also offering credit card debits would have greater appeal to some donors.

The greatest issue was deciding between a one-fee-for-all annual membership of $200 (with monthly payments of $16.66), or having the donor choose monthly payments between $10 and $100+. After some debate with our teachers and board, we decided on giving donors a choice of levels.

The 2003 spring direct mail appeal launched our monthly giving program with a letter from one of our well-known teachers, Sylvia Boorstein. The letter stressed the need for annual operating support and explained how this form of giving is better than a single annual gift, for both the donor and the organization.

For the organization, the biggest advantage of monthly giving is having a reliable source of income every month — that makes our budgeting easier. With automatic debits, we don't have to send pledge reminders and we send out fewer appeals, saving printing and mailing costs. It's also easier to retain donors — once they've made that ongoing monthly commitment, they're less likely to leave.

Monthly giving can also be better for the donor. Once it's set up, the donor doesn't have to worry about it anymore. Payments are spread out over the year so, for many, it's easier to be more generous. Donors have told us it feels good to be a part of a group that sustains the center; they feel they are the ones keeping the lights on. They've also told us they love to see their gift every month on their monthly statements — the joy of generosity is an important part of a spiritual path.



Thus began a very successful fundraising program at Spirit Rock.

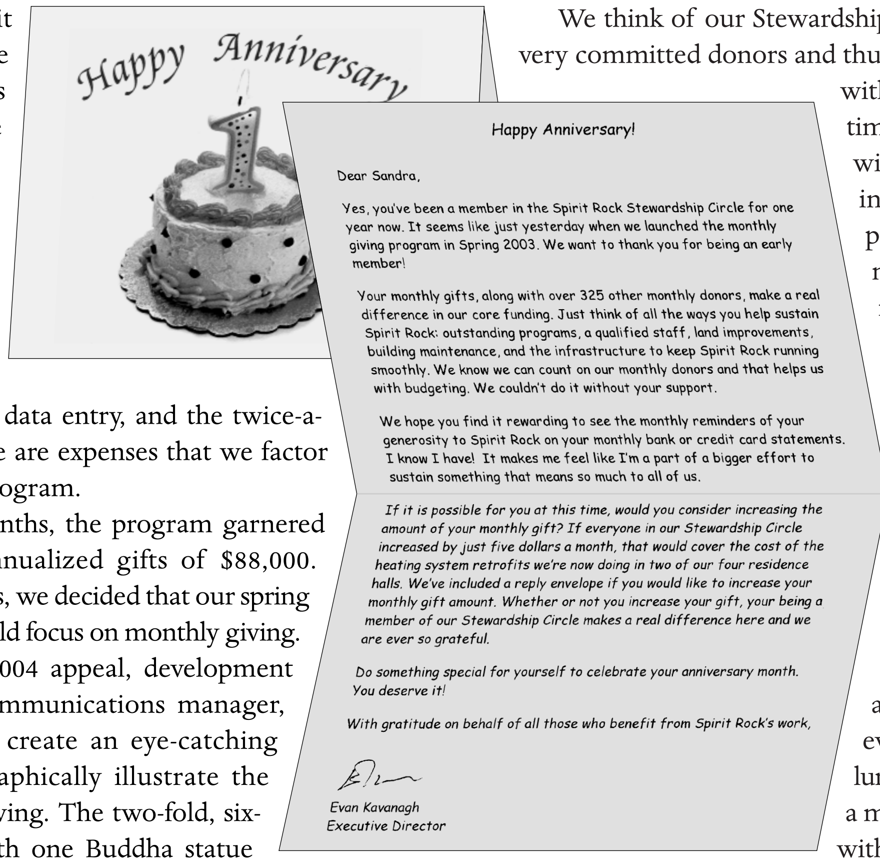
Our monthly donations are done automatically using our database software, which initiates and tracks all our electronic fund transfers (EFTs). Donors are given a choice of two different dates, and of direct debits from either their bank account or credit card account. We stress bank debits as our preferred method because credit card debits are more work for us and less reliable — credit cards expire or are lost, and donors sometimes change which card they want to use. There is also the expense of credit card merchant fees.

It takes a fair bit of time and effort to set up the program, to do the new-donor data entry, and the twice-a-month batches. These are expenses that we factor into the cost of the program.

In its first 12 months, the program garnered 280 donors, with annualized gifts of $88,000. Because of this success, we decided that our spring mailing each year would focus on monthly giving.

For our spring 2004 appeal, development worked with our communications manager, Karen Gutowski, to create an eye-catching piece that would graphically illustrate the power of monthly giving. The two-fold, six-panel piece starts with one Buddha statue representing one monthly gift, then 12 statues representing a year of gifts, then multiple statues representing the gifts of hundreds of monthly donors, visually illustrating how this type of ongoing support sustains our center (which is pictured in another panel). The piece included a generosity quote from the Buddha and a quote from one of our teachers stating how easy he finds this type of giving and how pleasurable it is to be reminded of his generosity every month. The appeal package also included a short invitation from teacher Sylvia Boorstein to join what we named the Stewardship Circle, along with a return envelope and a reply device for becoming a monthly donor or making a one-time gift.

We now offer monthly giving as a payment option on the remits for our three direct mail appeals, in our newsletter, and on remit envelopes. There is also related signage at a few strategic places throughout the center. Some aspect of monthly giving is featured in all our newsletters — an informative article, an interview with a monthly donor, or a list of the monthly donors in the Stewardship Circle.



Happy Anniversary!

Dear Sandra,

Yes, you've been a member in the Spirit Rock Stewardship Circle for one year now. It seems like just yesterday when we launched the monthly giving program in Spring 2003. We want to thank you for being an early member!

Your monthly gifts, along with over 325 other monthly donors, make a real difference in our core funding. Just think of all the ways you help sustain Spirit Rock: outstanding programs, a qualified staff, land improvements, building maintenance, and the infrastructure to keep Spirit Rock running smoothly. We know we can count on our monthly donors and that helps us with budgeting. We couldn't do it without your support.

We hope you find it rewarding to see the monthly reminders of your generosity to Spirit Rock on your monthly bank or credit card statements. I know I have! It makes me feel like I'm a part of a bigger effort to sustain something that means so much to all of us.

If it is possible for you at this time, would you consider increasing the amount of your monthly gift? If everyone in our Stewardship Circle increased by just five dollars a month, that would cover the cost of the heating system retrofits we're now doing in two of our four residence halls. We've included a reply envelope if you would like to increase your monthly gift amount. Whether or not you increase your gift, your being a member of our Stewardship Circle makes a real difference here and we are ever so grateful.

Do something special for yourself to celebrate your anniversary month. You deserve it!

With gratitude on behalf of all those who benefit from Spirit Rock's work,

Evan Kavanagh
Executive Director

We have created a colorful anniversary card that we send to monthly donors after they've been giving in this way for one year. The card thanks them for their ongoing commitment, tells them how their donations are being used, and asks them for an upgrade, explaining how the extra money would be used (a simple upgrade remit is enclosed). We plan to do this on each subsequent anniversary date for all our monthly donors.

We think of our Stewardship Circle members as very committed donors and thus try to have contact with them at least five times a year. We start with the letter thanking them for their pledge to become a monthly donor. They receive a year-end tax letter stating the annual total for their monthly gifts, thanking them, and describing the impact the Stewardship Circle has on our operating budget. We send an invitation to a free annual recognition event that includes lunch in our dining hall, a meditation sit and talk with one of the center's teachers, and a small gift. If they are unable to attend (many live out of the area), we send them a CD of the teacher's talk recorded at the recognition event. Members see their names listed annually in the Stewardship Circle in our newsletter, and they receive an anniversary card for every year they are members. We continue to explore other ways to stay in contact with these special donors and show our appreciation.

Nineteen months after the launch of this program, the number of monthly donors expanded to 330 (there has been only about a 6 percent dropout rate) with annualized gifts of $120,250. The average monthly gift is $30.50, with monthly amounts ranging from $10 to $250 per month. About 45 percent are bank debits and the rest are from credit cards.

Needless to say, we are delighted with the success of this program and plan to focus on monthly giving whenever and wherever we can! GFJ

SANDRA FRANCOUR IS DIRECTOR OF DEVELOPMENT AT SPIRIT ROCK MEDITATION CENTER IN WOODACRE, CALIFORNIA. SHE CAN BE REACHED AT SANDRAF@SPIRITROCK.ORG.

Being Well Connected: Why Local Politicians Matter to Nonprofits

BY PATRICK MCLEAN

There are any number of reasons nonprofits ignore their local elected officials. Some nonprofit staff feel they are too busy raising money and running programs; others are intimidated by the political setting. Many of us in social change work, frustrated with the corporate domination of politics at the federal level, look skeptically at all politicians. Still other organizations mistakenly believe that working with their local politicians will somehow jeopardize their 501(c)(3) status. None of these is a good reason to ignore people in your community who could play a major role in your organization's success.

The vast majority of elected officials really do care about their communities; almost all of them feel a real sense of accomplishment in helping their constituents. You wouldn't want your nonprofit judged by the well-publicized scandals involving prominent philanthropic officials absconding with their agencies' cash; neither should you approach your relationship with elected officials by thinking they are all unethical, or that you have to sacrifice your moral standards to get involved with them. What you are seeking is a mutually beneficial relationship with your elected official.

Eight years ago, as a staffer in the Ohio Senate and a volunteer board member for a local youth center, I pulled my two worlds — politics and nonprofit work — together to help fund a capital campaign. As a board member for a small organization in Columbus that had an operating budget of $300,000, I knew that fundraising for a new $2.6 million building would be a significant challenge. Housed for years in the basement of an old, crumbling church, the organization had outgrown that venue and was ready for a building of its own. The organization served a predominantly African-American clientele and had no major individual donors. The board consisted mostly of loyal neighborhood volunteers, few of whose pockets were deep or whose connections were high powered.

The most obvious lesson is that elected officials can sometimes be a source of assistance for your organization.

At the same time, a local state senator representing a predominantly white district was running for a new office — Columbus City Attorney — and he needed to develop relationships in the African-American community where he had never been on the ballot before. Knowing this, I asked the director of the youth center to approach the senator about securing funding from the state for the new building. Though the senator had no prior ties to the organization, I thought he might be open to the idea of providing some assistance given his political aspirations.

The senator was indeed interested, both in the youth center and the capital campaign project. He visited the center, he had several conversations with the center's director, and ultimately he secured $750,000 for the project in the state's capital appropriations budget less than a year after the initial contact was made.

The appreciation of the center's board and staff was not enough to make the senator the city attorney, but his work on behalf of the center was more than just political. Two years later, while still in the Senate, he championed another $500,000 for the center's project, bringing the total to $1.25 million, almost half the cost of the construction. For the senator, facing impending term limits, the money wasn't provided for political reasons; it was provided because he came to believe in the mission and goals of the youth center.

LESSONS TO BE LEARNED

There are several lessons to be learned from this example. The lessons are not that elected officials are loaded with cash, or that they are just waiting for you to ask before they will shower your agency with governmental largesse! The most obvious lesson is that elected officials can sometimes be a source of assistance for your organization. Without the assistance — in this case, financial — made possible by the senator, our organization would not have realized the dream of a new youth center.

The more subtle message, however, is that elected officials can be helpful in a number of ways — financial and otherwise — if you take the time to explain your mission and needs to them. In this case, the senator provided assistance because he supported what the center was trying to do for children in a disadvantaged area of Columbus. If the center director had simply asked for money without taking the time to explain the goals and needs of the organization, the senator would have had little reason to be so forthcoming.

Finally, the lesson that the center had something to offer to the senator should not be lost. In this example, assistance was flowing in both directions between the center and the senator. The senator's public exposure through his work with the center opened up avenues for him in neighborhoods where he previously had few, if any, contacts. Expanding one's base of support is always a goal of an elected official.

Always have your message prepared in advance and be able to deliver the basic verbal message in 30 seconds or less.

Few organizations are quite as fortunate as the youth center from this example. Rarely does an organization receive so much money in such a short period of time, and even rarer still is receiving money without laying more groundwork. Ideally, the relationship with an elected official begins slowly and methodically, with initial "getting to know you" meetings long before anyone makes a request for money. These initial meetings should be well planned and the purpose clear before the meetings begin. As you prepare for those introductory meetings, keep the following rules in mind.

MEETING MANNERS

First, elected officials' time is limited, so the time you spend with them has to be effective and the materials you present must be succinct. Always have your message prepared in advance and be able to deliver the basic verbal message in 30 seconds or less. In addition, always have a "one-pager" to leave behind that provides an overview of what you want to convey: what your organization does, who you serve and where you serve them, what the needs of your organization are, and why meeting those needs is important. If you are fortunate enough to have a longer meeting, you can expand on the basic message, but you never know when a planned 30-minute meeting will turn into a 30-second meeting, and you don't want to waste even that short opportunity.

If your meeting with a senator is cancelled at the last minute, ask if there is a staff person you can talk to.

Second, if your meeting is interrupted or abruptly rescheduled, don't get too upset. Phone calls, staffers barging into the room, or a last-minute committee meeting are all par for the course in a legislative setting, and you shouldn't take a sudden change of plans personally. If you take the change in stride, the official will appreciate it; if you appear agitated, it will seem that you don't understand the nature of the elected official's job, and you may be taken less seriously.

Third, meeting with a staffer may be an excellent substitute for a meeting with the elected official. If your meeting with a senator is cancelled at the last minute, ask if there is a staff person you can talk to. By all means, don't talk down to the staffer or treat him or her as if he or she is inferior to the official. In many cases, the staffer is the policy brains behind the office and may be far more knowledgeable about your issue than the official is. Remember that making friends with a staffer can be a perfect way to develop an accessible contact wherever you are trying to open a door.

Fourth, when the time comes to ask for something, be explicit about what you want an elected official to do. Depending on the circumstances, you may want the official to hold a public meeting, write a letter of support, find money in the budget for a project, change a law or ordinance, or attend or speak at an event. Don't beat around the bush, leaving the elected official to guess how they can best help you. Instead, be up front about what you need and when you need it.

Fifth, always follow up with the official's staff. If you have the opportunity to talk with an official, he or she may not remember to convey the conversation to the staff, and your request could be on its way to falling through the proverbial cracks. If an elected official makes a promise, either to meet with you or to do something else for you, be sure you double check it with the staff. As noted above, it is a good idea to get to know the staff better anyway, and following up will give you this opportunity.

Finally, don't get in a pattern of meeting with your elected officials only when you want something. Take the time to update them when your organization launches a new program or when you have received a new grant. Be sure to include them on your regular mailing list, and invite them to events you hold. Developing an ongoing relationship will increase your chances of success when the time comes to ask for something.

WHAT YOU CAN OFFER

So far, we have covered ways that elected officials can help nonprofits. But the relationship need not be a one-way street. To the contrary, it should be mutually beneficial. Nonprofits have resources that elected officials need. Foremost among these resources is information. Nonprofits are often in the position of having their hand on the pulse of the community. To find out how the neighborhood is functioning and what the needs of the area are, officials often turn to grassroots organizations.

To find out how the neighborhood is functioning and what the needs of the area are, officials often turn to grassroots organizations.

These same organizations are often the source of research or data on the conditions of the official's constituents. For example, the local literacy council may have information about whether literacy rates are improving in the neighborhood and who is seeking their services. Similarly, the local refugee services agency may be able to tell the official where people are arriving from and how successful current assimilation programs have been. Such information may be the genesis of legislation or new program funding that will generate publicity for the official. At the same time, a local agency might have a chance to share that public spotlight and, if used correctly, an opportunity like this (perhaps a newspaper article about the issue) can be used effectively with the agency's direct fundraising efforts.

To the extent that a nonprofit agency holds public events, there may be an opportunity to supply the elected official with some "free media." Officials are forever looking for opportunities to be seen positively in the public eye, and attending your fundraising breakfast may be a perfect match. The official gets good publicity; your organization receives the credibility that comes from having a high-profile guest at your event.

If it sounds like your organization is "being used" by the elected officials, perhaps there is a grain of truth in this. But if you think about every other relationship in your life, isn't there also an unspoken quid pro quo? When you borrow an egg from your neighbor, isn't there an expectation that if he shows up at your door next week asking for a cup of sugar, you're going to give it to him? Politicians are human, and they're in the business of getting people to vote for them.

One way for the politician to earn votes is to faithfully represent the interests of your organization. In a representative democracy, there's nothing unseemly about this. As the example of the Ohio senator illustrates, a long-term relationship can be based on nothing more than a public figure hoping to use his office to improve the community in which he lives. This is the essence of representative government, and it is an example of how the system can work effectively. Today, almost eight years after the senator secured funding for the youth center, he still asks me how the center is doing whenever we see each other. He still cares. Every nonprofit could benefit from cultivating such relationships among elected officials.

Five Easy Ways to Help Your Elected Officials Get to Know You

Nonprofit executives rarely have the time to begin a new fundraising strategy, particularly one with uncertain long-term effects. Here are some ways you can get the ball rolling with your elected officials without dropping everything else.

1. Make a list of all your elected officials and add their names to your mailing list. By receiving your mailings, the officials, or at least their staff, will start to know more about your agency's mission and the events that you're holding.

2. Assign a board member to be your "Elected Officials Liaison." The board member can make sure your list of elected officials is always up to date and can do background research on the elected officials (such as what committees they serve on and which civic organizations they are involved with).

3. When you're creating a packet of information about your agency for potential funders, make a few extras for your elected officials. Include basic information about your agency and, when you have time, send the packet with a short note offering to provide any additional information about your agency.

4. If you receive some positive press in the print media, send a copy to your elected officials along with a business card and a handwritten note in the margin saying, "Thought you'd be interested in learning about our ____ program." It doesn't have to be more formal than this if you're just passing along information, and it's an easy way to remind the officials that your agency is out there working.

5. The next time your agency is giving an award, consider whether there are elected officials who have supported the kinds of work for which the award is given. Most people like to be recognized for their work, and elected officials are no exception. Depending on the level at which the official serves, he or she might attend your awards event; if you want this to happen, be prepared to hold your event around their schedule.

DON'T WAIT

So where should you begin? For most small organizations, finding time to meet with elected officials may not seem like the most pressing item on the agency's agenda. But if you wait until you really need help before developing those relationships, the chances of success diminish dramatically. Start with some of the ideas in the sidebar on the previous page, and then assign someone from your organization to begin working with your local elected officials — everyone from your local school board representative to your members of Congress — and slowly make the officials part of the community team that supports your organization. Some day you may be pleasantly surprised at what they can do for you. GFJ

PATRICK MCLEAN IS THE EXECUTIVE DIRECTOR OF THE WASHTENAW AREA COUNCIL FOR CHILDREN, A CHILD-ABUSE PREVENTION AGENCY IN ANN ARBOR. HE WAS FORMERLY MINORITY CHIEF OF STAFF IN THE OHIO SENATE. YOU CAN REACH HIM AT MCLEAN818@EARTHLINK.NET.

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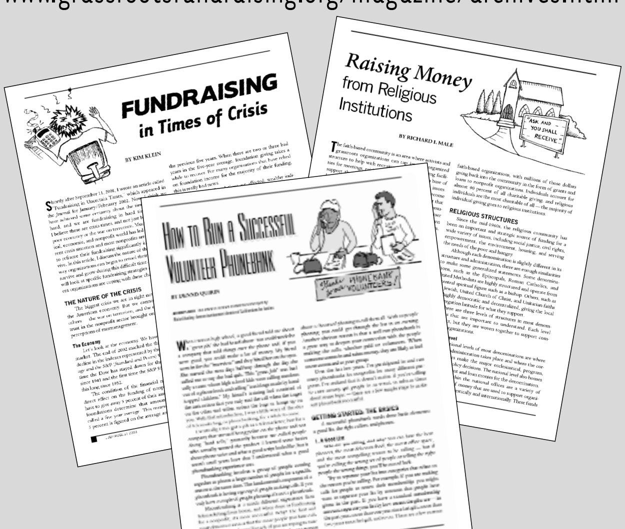

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BOOK REVIEW

Benefit Auctions: A Fresh Formula for Grassroots Fundraising

By Sandy Bradley
Softcover, 168 pages, $16.95. Pineapple Press.
Order from www.pineapplepress.com or call 800-746-3275

Reviewed by Kim Klein

Sandy Bradley's new book is a comprehensive and wonderful step-by-step guide to planning and producing successful auctions. Bradley is herself a professional auctioneer and a long-time nonprofit volunteer. Her introduction summarizes her philosophy about auctions: "The easiest grassroots fundraiser is an auction. People are more comfortable asking for donations of goods than for donations of money. Auctions are still a lot of work, but there is nothing vague about the task. The wheel has been invented and now you can take full advantage of it. You can actually decide how much money you're going to make."

Bradley writes in a breezy and accessible style. Short but thorough chapters are devoted to all the things you might want to know about any event: Setting the Ticket Price, Details of Staging, Encouraging Bidding, Silent vs. Live, and much more. The last chapter of Frequently Asked Questions contains ten pages of information from a person who has clearly been asked every question one could think of about an auction. This chapter is followed by a thorough glossary and another 20 pages of sample solicitation letters, catalog pages, thank-you letters, setup charts, task lists, and the like.

Bradley has an excellent and amusing board responsibility list, presented as a multiple-choice exam. Here are some questions from it:

- ***As a part of my board duties/privileges I will:***
  - a. Wear a shirt and shoes to board meetings
  - b. Vote wisely on all issues
  - c. Solicit at least $1000 in donations for the annual auction
  - d. All of the above
- ***I will attend board meetings***
  - a. But will always be late
  - b. Whenever convenient
  - c. Regularly and dependably
  - d. If I don't have baseball tickets that day

Any board could use her ten questions to clarify board roles and responsibilities as well as to decide whether or not to do an auction. The process would be fun, but pointed, and at the end those who were committed would be separated from those were not.

Bradley maintains that a first-time auction can net $10,000–$30,000. She says, "It is okay to plan on a $5,000 auction, but for fifteen percent more effort you can earn twice as much money." The other assertion she makes, which I agree with 100 percent, is that "Ideally the event should use absolutely no staff time." She discusses the role of the chair and how that role can be divided between two people if necessary. Almost every chapter has tips on how to use volunteers, and there is one full chapter devoted to how to find the volunteer leadership for the auction and another on how to train volunteers for the auction.

She makes her case that a successful auction can be done by an all-volunteer committee (of people who are not full-time volunteers) because she so thoroughly describes what has to be done. A smart, enthusiastic, but inexperienced committee could, by reading and using this book, reason their way to success.

Bradley offers 22 questions to ask before signing a contract on a venue. These include the following: "Do you have a preferred list of caterers that we will be required to use?" "What are the rules about posting things? Can we use tape, pins, or nails on the walls or windows?" "Are extra chairs and tables available from you for an additional cost or should we rent them?" Having seen people go way over budget because the answers to questions they neglected to ask were expensive, I appreciate this level of detail.

There are useful tips on what items do better in a live auction or a silent auction, how to manage traffic flow, how to make sure you get paid for all items, what to do if a donor gives you something that is clearly not going to sell, and so on.

Everything you would want to know to run a successful auction is here as far as I can tell; even if the author has left something out, you would have the skills from the rest of the book to figure out your own answers.

This book is a great bargain for something a group of committed volunteers can use to net your organization at least $10,000 — and often much more. GFJ

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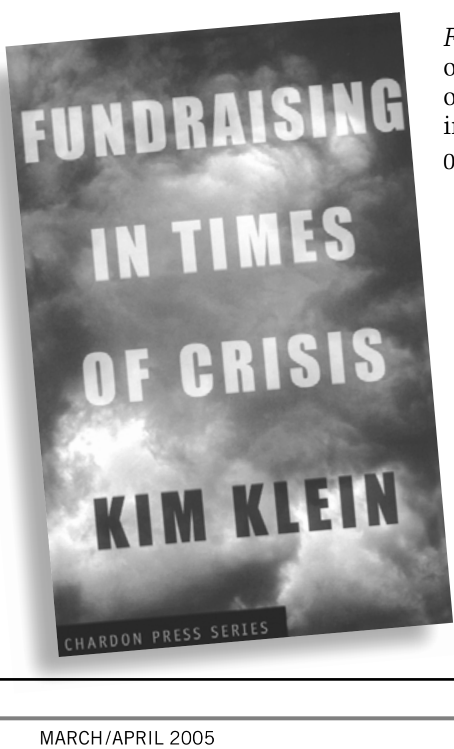

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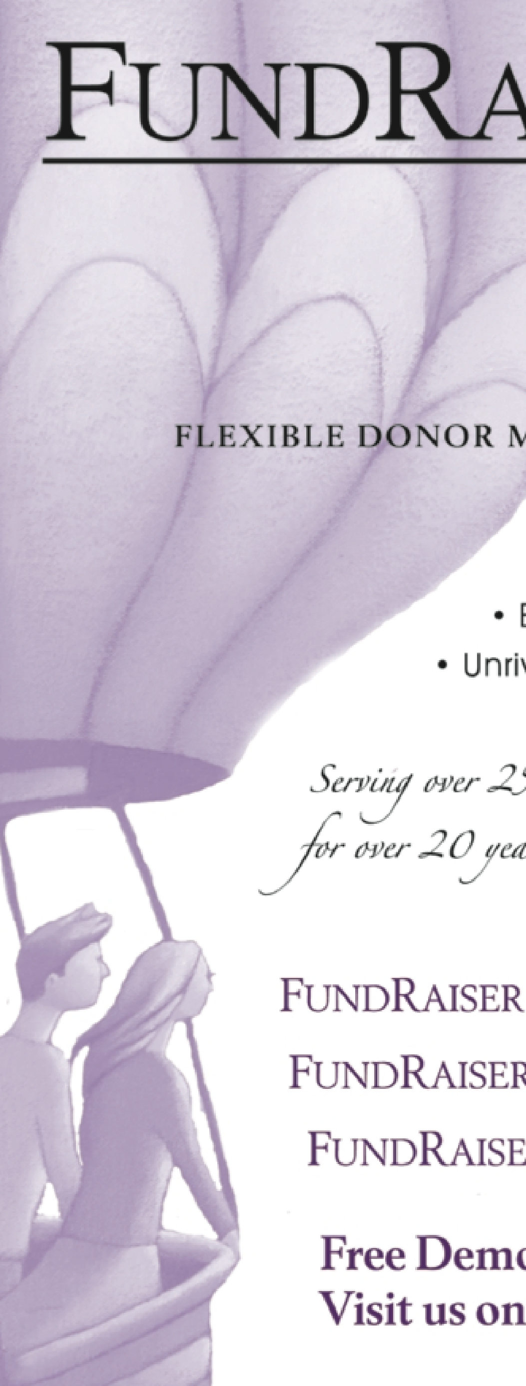

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