

FUNDRAISING IDEAS THAT WORK!

Grassroots Fundraising Journal

VOLUME 24 ■ NUMBER 3 ■ MAY/JUNE 2005



FEATURING:

***Matching
Fundraising
to Mission:***

**HOW TO DO A
CLEAN-A-THON**

BY ELANA GRAVITZ

ALSO IN THIS ISSUE:

Why Boards Don't Govern

**Donor Fatigue:
Causes and Cures**

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On Our Cover • THE NOKOMIS HEALTHY SENIORS PROGRAM, IN MINNEAPOLIS, MINNESOTA, HELPS NEIGHBORHOOD SENIORS CONTINUE TO LIVE INDEPENDENTLY IN THEIR HOMES. VOLUNTEERS PARTICIPATE IN AN ANNUAL CLEAN-A-THON, WHICH RAISES FUNDS WHILE HELPING SENIORS WITH SPRING CLEANING CHORES. FOR MORE INFORMATION, SEE WWW.NOKOMISHEALTHYSENIORS.ORG.

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LETTER FROM THE PUBLISHER

KIM KLEIN

We want to hear about your favorite *Journal* articles. As we move into our 25th year, we'll celebrate by publishing a collection of favorite articles from the *Journal*. I will submit my favorites and I'd like you to submit yours. Was there an article whose message was particularly helpful? One whose ideas stayed in your mind for a while? One that had a fundraising activity that you put to successful use? Take just a moment to think about what you've read here over the last several months — or years — and let me know what you think others would like to see repeated. If you can't remember the name of the article, just send an approximate name, the name of the author if you know it, or a pretty good idea of what the article was about, along with a sentence or two about why you liked it to me at kimklein@grassrootsfundraising.org. We will be choosing the final articles at the end of July, so don't delay.

This issue has some great articles — some that may even become your favorites in the future. Elana Gravitz from Nokomis Healthy Seniors in Minneapolis writes about an event her organization has developed that both fulfills their mission and makes money. Her lesson that you need to think about how to merge mission and fundraising is a critically important one. Even if your mission is not related to this activity, it might be something you could adapt as a fundraiser for your group.

Jan Masaoka and Mike Allison's insightful and incisive article, "Why Boards Don't Govern," argues that many of the tasks that board members engage in are supportive in nature — raising money, getting publicity, educating their communities about the organization. Though important and appropriate, these are not governance tasks. There are several reasons for this gap in board functioning and the authors explore them while suggesting some remedies.

Finally, I take a look at the problem of "Donor Fatigue" — what it is and what your organization should do to avoid it.

And speaking of fatigue, I see in myself and in many people around me a real tiredness brought on by the constant demands of our work and the fight to stay optimistic in spite of all the setbacks we are experiencing. Please remember that in order to do the work we do with energy and a hopeful spirit we must, paradoxically, take time off from time to time. So, I hope all of you are planning to go home early some days in the next few months, spend time with friends, take a vacation, read a novel, see a movie that does not improve your mind, and just sit still. Your work will still be there after you have rested.

MATCHING Fundraising TO MISSION:

HOW TO DO A Clean-a-Thon

BY ELANA GRAVITZ

I am the Executive Director of The Nokomis Healthy Seniors Program — a small, grassroots nonprofit that helps community elders live independently at home. We have a small staff of part-time employees and a board of committed “regular” folks, most of whom have no prior fundraising experience. We were looking for a new way to raise money, ideally a special event that was more original than a pancake breakfast. A program similar to ours told us about an event they held called a Clean-a-Thon. They invited us to do it with them, and it was such a success that last year we did it again on our own. This year will be our third annual Clean-a-Thon, and it is becoming a spring tradition for our organization.

Here’s how it works: Like any “thon” (bowl-a-thon, walk-a-thon, and so on), volunteers form teams, raise pledges from sponsors, and take part in an event. But instead of walking or bowling, Clean-a-Thon volunteers spend a Saturday morning cleaning the homes of our neighborhood seniors. They do yard work and heavy cleaning, the type of work that the seniors can’t do themselves. It’s not glamorous — typical jobs include washing kitchen cabinets, scrubbing bathroom floors and fixtures, scrubbing and mopping the floors, washing greasy kitchen walls, cleaning carpets, washing windows, cleaning light fixtures and ceiling fans,

and washing woodwork. But each and every volunteer said it was a rewarding experience and that they would be happy to volunteer again.

Our Clean-a-Thon was particularly successful from the start in raising a significant amount of money with very few expenses. The first year fifteen volunteers cleaned two homes and raised \$1,900. The second year twenty-two volunteers cleaned six homes and raised \$4,400. Both years there were no expenses, so every dollar raised was profit.



A senior looks on in wonder as a Clean-a-Thon team scrubs his kitchen.

WHY IT WORKS

Several aspects contribute to making the Clean-a-Thon a success:

- *It is a unique idea, and it is easy for volunteers to get excited about it.* We’d talked about doing a spaghetti dinner or a walk-a-thon around our local lake. When we heard about the Clean-a-Thon it was as though a light bulb went off over our heads. It works

because it fits who we are: ordinary people getting together to help seniors live better lives.

- *We have a crack team of three responsible, organized board members who serve as our planning committee.* The committee coordinates the entire event, consulting with me as needed. Overall, the staff commitment is minimal. This event could easily be transferred to an all-volunteer organization.

Clean-A-Thon Consent Form

Homeowner's Statement of Consent: As a participant in the Nokomis Healthy Seniors ("NHS") 2003 Spring Clean-A-Thon, I agree to allow a team of volunteers organized by NHS to clean my house, as specified on the attached sheet. I expect the members of the cleaning team to use their best efforts in performing their tasks, but I understand the risks involved in participating in the Clean-A-Thon and I willingly and voluntarily accept these risks. I grant NHS permission to use photographs and quotations from me in promotion of this program.

Name: _____
 Phone Number: _____
 Address: _____
 Signature: _____

• *The format makes it easy to start small and easy to build each year.* The first year we cleaned just two homes; the second year, we expanded to six. This year we hope to do ten. First-year volunteers were sometimes shy about soliciting donors, but second-year teams were excited to get as many sponsors as they could.

• *A board member or trusted volunteer leads each team and recruits additional team members and team leaders from direct service volunteers.* They build team spirit by having the teams name themselves; we have seen a healthy rivalry develop between the Dust Bunnies and Clean Sweep.

HOW TO DO IT

The following timeline will help make a Clean-a-Thon a snap if you decide to do one.

Ten Weeks Before the Event:

- Select Planning Committee
- Set event date

Eight Weeks Before the Event:

- Identify team leaders. Ideally, each member of your board will fill a team with people they recruit.
- Identify candidates for cleaning. Our direct service staff thinks about which of our senior clients would most benefit from the cleaning help and talks with seniors to assess interest and availability. We recruited the seniors from our clients, choosing those who would be appreciative and friendly to the volunteers.

Six Weeks Before the Event:

- Organize the paperwork (see samples):
 - Create house cleaning checklist
 - Create consent form and disclaimer
 - Create sponsor sheet
 - Create volunteer evaluation
- Determine potential sources for in-kind donations: coffee, donuts, cleaning supplies, soft drinks, chips, paper products, name tags, prizes for top fundraisers.
- Formalize team leaders; give them sponsor sheets and have them start to recruit team members.

Four Weeks Before the Event:

- Team members solicit sponsors for donations. (Potential sponsors include co-workers, friends, family members — local and distant, people in your book group, anyone you've ever sponsored for a "thon," and so on.) We gave volunteers sample e-mail text that they could send out asking for pledges.
- Interview seniors whose homes will be cleaned to fill out checklist. Visit each home before sending volunteers. In our case, we are lucky to have a social worker on our board. She visited each home, talked with the

Clean-A-Thon Check List

Client Name: _____ Phone Number: _____
 Address: _____
 Emergency Contact: _____ Relationship: _____
 Emergency Contact's Phone Number: _____
 Directions to Client's Home: _____

KITCHEN:

- floor
- walls
- cupboards
- oven, microwave
- refrigerator, freezer
- light fixtures
- windows
- other _____

NOTES: _____

BATHROOM:

- floor
- walls
- toilet
- tub/shower
- vanity
- mirrors
- light fixtures
- windows
- other _____

NOTES: _____

LIVING ROOM:

- floor
- walls
- furniture
- light fixtures
- windows
- blinds/curtains
- dusting
- other _____

NOTES: _____

BEDROOMS:

- floor
- walls
- windows
- blinds/curtains
- dusting
- other _____

NOTES: _____

PETS:

Special Instructions:

CLEANING SUPPLIES:

	HAS	NEEDS
Step stool/ ladder	<input type="checkbox"/>	<input type="checkbox"/>
Garbage bags	<input type="checkbox"/>	<input type="checkbox"/>
Brooms/mops	<input type="checkbox"/>	<input type="checkbox"/>
Rags	<input type="checkbox"/>	<input type="checkbox"/>
Paper towels	<input type="checkbox"/>	<input type="checkbox"/>
Toilet brush	<input type="checkbox"/>	<input type="checkbox"/>
Vacuum cleaner	<input type="checkbox"/>	<input type="checkbox"/>
Cleaning solutions	<input type="checkbox"/>	<input type="checkbox"/>

Clean-A-Thon Pledge Form

Volunteer Name _____
 Address _____ Phone _____
 City _____ State _____ Zip _____
 Team Name _____

Collect the money when you sign up sponsors – Make checks payable to Nokomis Healthy Seniors

Sponsor's Name	Address/City	Zip	Donation	Paid

Total \$ _____

Contributions are tax deductible.

Volunteer's Statement of Consent: I understand the risks involved in participating in the Clean-A-Thon and willingly and voluntarily accept these risks. I attest that I am physically fit and prepared for this event. I pledge that I will use prudence and safe working practices while participating in the Clean-A-Thon and will respect the dignity and property of the individual(s) in whose service I am engaged. I grant the Nokomis Healthy Seniors Program permission to use photographs and quotations from me in promotion of this program.

Signature _____ Emergency Contact:
 Parent or Guardian's signature if under 18 years of age: Name _____
 Signature _____ Phone _____

senior about what work they wanted done and what to expect, and filled out a form stating very clearly what the volunteers should and should not do, and what cleaning supplies they have and what more is needed.

- Solicit local businesses for in-kind donations. For best results, go to businesses that are frequented by your clients, and have a regular customer (such as one of your board members) solicit the donation. Recognize the businesses in handouts and other publicity. Donated cleaning products and food mean no expenses.

We felt it was important to serve coffee and doughnuts when volunteers checked in and gathered for orientation in the morning, and we also had soda and snacks when they returned for the awards ceremony. Local businesses were happy to donate what was needed, which meant every dollar raised by volunteers went straight to the program. We were able to get cleaning supplies donated from local hardware stores and cleaning services and a cleaning service donated one hour of free cleaning to use as a prize for our Golden Plunger recipient.

- Arrange for an honorary award presenter. Our local city council member served as the presenter for our brief awards ceremony, which was also a nice photo op for them.

Two Weeks Before the Event:

Check in with seniors to confirm availability, and contact team leaders and staff to check on progress. Remind team leaders to encourage all their team members to get lots of sponsors!

Week of the Event:

- Create cleaning supply boxes for each team. Make sure there's enough to keep each team member busy. No one wants to show up to clean and end up spending half the morning sitting around waiting for their turn with the Windex.
- Make award certificates and trophies for the top fundraisers. Have a sense of humor. We decided to give out prizes for the top three pledge getters. The prizes were the Golden Plunger, the Silver Dustpan, and the Bronze Broom. With spray paint, Mardi Gras beads, feathers, and googly eyes, the committee made prizes that were a lot of fun.
- Confirm guest award presenter.

- Buy supplies as needed and pick up donated items.

Day of the Event:

Here's a timeline for the big day:

- **7:30** Pick up coffee and doughnuts.
- **8:00** Committee and Executive Director arrive at office.
- **8:30** Volunteers arrive. As they come in, give everyone a name tag and collect sponsor sheets, signed disclaimer and pledges. Be sure volunteers collect all their pledges before the event and turn them in that day. It is very difficult to collect later.
- **8:45** Executive Director gives brief organizational orientation; committee gives teams cleaning supplies and assigns them to homes.
- **9:00** Take a picture of each team before they head off to the houses.
- **9:15** Tally pledges. During the event you'll need two people (in our case one of the committee members and myself) based in the office. They tally the pledges and check math, determine who wins the prizes, and are available for questions from the volunteers at seniors' homes. Be sure each volunteer's sheet matches the money they turned in. Note any missing pledges or company matching funds that need follow up. Keep each pledge sheet with its money until you have double-checked everything. The first year we put

everyone's pledges into two piles, cash and checks. We later realized we were short some cash pledges and had a hard time figuring out who still owed us money.

- **9:30** Roving committee member visits each site to check in, answer questions and take pictures.
- **11:45** Clean teams return to office and snack on munchies while they fill out evaluations and share stories.
- **12:00** Awards ceremony with distinguished guest presenter; take pictures of tired, happy volunteers.

One Week After the Event:

Write thank you notes to volunteer cleaners and team leaders, donors (including those who gave in-kind donations), and seniors whose houses were cleaned.

Review evaluations. The surveys taught us how to improve and helped us recruit new volunteers. One of the best things about the Clean-a-Thon was that it brought in new organizational allies. Team leaders filled their teams with boyfriends, cousins, co-workers, members of their volleyball team...all of whom were learning about our organization for the first time. The survey asked if they would like to receive our newsletter, if they would like to volunteer in another capacity, and if they would like to be on a clean team the next year. Every single person said they'd like to be on a team the next year!

Two Weeks After the Event:

Committee and Executive Director hold wrap-up meeting to review surveys, discuss what went well and write up what to do differently next year. Clean-a-Thon notebook (containing sample forms, completed disclaimers and pledge sheets, minutes from committee meetings, and so on) is completed and given to staff for safekeeping in the office.

Write an article about the event — including pictures — for your organizational newsletter and website.

KEY REMINDERS

- ***This sounds obvious, but remind people that they really do need to get pledges.*** Both years some volunteers got involved because they wanted to help seniors clean their homes, but didn't collect pledges. There was also some discomfort among some direct service staff who liked the idea of volunteers cleaning homes but not that it was related to raising money. We kept sending out the message that while there is a service component, this is a fundraising event! We are here to raise money so our fabulous work can continue all year long.

- ***Keep teams small, four to six people.*** There are two reasons to have small teams: first, it's hard to keep more people than that busy in a home, and second, more people

might be disturbing to the senior. Most senior homeowners have been living alone for several years. It's overwhelming to them to have a large group of energetic strangers — no matter how well intentioned — come in and take over.

- ***Have everyone — senior and volunteer alike — sign a waiver ahead of time.*** Even so, expect some glitches. The first year we got a call from one of the seniors saying his watch had been stolen during the cleaning day. One week and many anxious phone calls later, he found the watch in his sitting room.

- ***Identify sources of matching funds.*** This is the single easiest step to increase the total amount raised by the event. One board member works at an organization that will match employee donations, so all her co-worker's pledges were doubled. We also identified a fraternal organization that matched all the funds raised in the event.

- ***Stay flexible.*** One team leader had a family emergency the week before the event. We reassigned his team members to other teams and cleaned one less home. One senior told our planning committee member at the pre-Clean-a-Thon home visit about all the cleaning she needed done in her house, but when the volunteers showed up she refused to let them in. Luckily, it was a nice day (which cannot be taken for granted in mid-April in Minneapolis) and the volunteers cleaned her gutters and trimmed her lilac bushes. Interestingly, she was thrilled with the help and has since begun to trust one of the volunteers to do small fix-it jobs around her house.

Clean-A-Thon Evaluation Form

Name: _____

Clean-A-Thon Volunteer: _____

Thank you so much for your involvement in our second annual Clean-A-Thon. We would appreciate it if you would take just a few minutes and complete this short survey so we can continue to improve on this adventure in the years to come!

1. What did you like best about this event?

2. Do you have any suggestions for future Clean-A-Thons — improvements, do something differently?

3. Would you be interested in any of the following?

- Volunteering next year on Clean Team
- Receiving Nokomis Healthy Seniors Newsletter
- Volunteering for Nokomis Healthy Seniors in some other capacity

Thanks again for your help!

A SUCCESSFUL EVENT

Overall, we've found the Clean-a-Thon to be a lot of fun and a great money raiser for our organization. The seniors and volunteers love it, too. Here's what some of them had to say:

Seniors:

"The rooms became so dust free, the bathroom became spotless, and the windows sparkled."

"I've never had anybody help me like you people do. I'm so pleased. I consider you my friends."

Volunteers:

"I enjoyed helping the people who aren't able to clean for themselves and seeing the smiles on their faces."

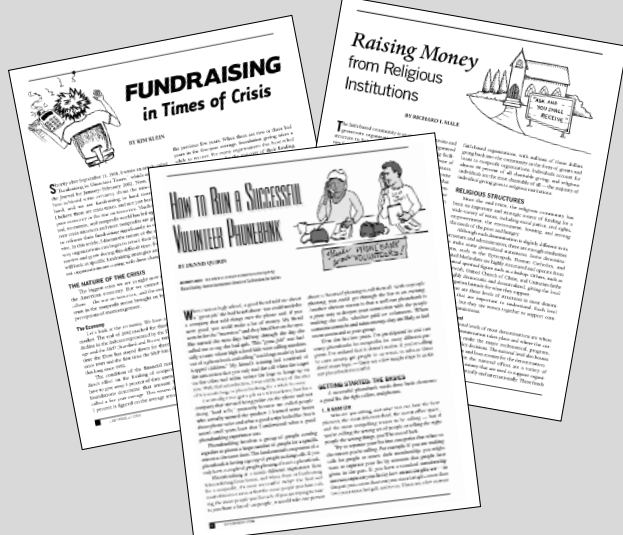
"Easy, quick, very fulfilling volunteer effort with quick results."

I hope you can adopt the Clean-a-Thon to fit your organization's style. Good luck, and happy cleaning! **GFI**

ELANA GRAVITZ, EXECUTIVE DIRECTOR OF NOKOMIS HEALTHY SENIORS, CAN BE REACHED AT ELANA.GRAVITZ@NOKOMISHEALTHYSENIORS.ORG.

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WHY BOARDS DON'T GOVERN

BY JAN MASAOKA AND MIKE ALLISON

In the aftermath of every “nonprofit mismanagement” news story is the question: Why didn’t the board do something? Yet the boards of the nonprofits recently headlined with scandals such as outlandish compensation for executive directors, the use of organizational funds for personal luxuries, or nepotism did not do any less than most nonprofit boards. The reality is that most nonprofit boards are ineffective in their governing function. Only when gross mismanagement is discovered does a failure at governance come to the fore. Sometimes the failure does not involve personal scandal but reveals organizational laxity, such as an organization using funds raised for one purpose for other program areas.

Nothing can dampen donors’ interest more quickly than an organization that does not seem to be taking responsibility for itself — and that responsibility lies in those who govern.

WHAT IS GOVERNANCE?

The two roles of support and governance encompass different tasks. In the role of supporters, board members seek to raise money, bring clout to the organization, provide special skills, such as in law or accounting, and act as ambassadors to the community. The many books and seminars on the subject testify to the emphasis on helping boards help — on strengthening organizations by means of board assistance.

The governance role, in contrast, has a different goal: protection of the public interest. Governance responsibilities for boards include selecting the top executive (the chief executive officer or executive director) and assessing his or her performance, reviewing and authorizing plans and commitments, ensuring compliance with legal and contract requirements, and evaluating the organization’s work.

Both of these board roles are distinguished from that of management, which is the province of the executive director.

WHAT’S WRONG WITH THE “IDEAL” BOARD MEMBER?

When most board members and executive directors dream of their ideal board member they envision someone who contributes money, obtains contributions from others, helps the organization get media coverage and political contacts, brings specialized expertise, and helps diversify the board’s composition. This ideal board member also identifies with the organization, is liked and admired by staff and other board members, and “fits in.” These characteristics describe a board member who can help provide the critical support agencies need to succeed.

But the very qualities that make board members good supporters are often qualities that limit them as governors. The reason boards don’t govern is less because they are uneducated or uninterested than because of some crucial, material, inherent reasons:

- *Board members rely on staff for information.* Because board members are often recruited to bring assistance and skills from other sectors of society, they often rely on staff for information about both the field and the organization. Unless they are themselves part of the people served (patrons of the community theater, adult children of Alzheimers patients, tenants of affordable housing), they typically have no independent information about the organization on which to draw.

- *Board members are often unfamiliar with nonprofit management.* Nonprofits are fundamentally different from either large corporations or small businesses. For example, a manufacturer can drop an unprofitable product line without the ill social consequences of an after-school program closing. In particular, people from business are often unacquainted with volunteer management, indirect cost rates, and fundraising strategies.

NOTHING CAN DAMPEN DONORS’ INTEREST MORE QUICKLY THAN AN ORGANIZATION THAT DOES NOT SEEM TO BE TAKING RESPONSIBILITY FOR ITSELF.

• *A crucial limitation on board effectiveness is the simple lack of time.* Board members are usually achievers with many responsibilities and find it difficult to attend meetings, study materials, and attend functions. In response, organizations try to keep meetings short and have fewer of them per year, or simply demand more time than most people can give.

• *At least narrowly speaking, it is not in the interest of executive staff to have an active, governing board.* Supporters help the manager get the job done; governors often make the job harder. The governance role is an outsider's role, holding the organization, and specifically the executive staff, to high standards of performance. While most nonprofit managers work hard to do a good job, it is not in any manager's personal interest to make her own job harder.

• *Finally, the consequences for inadequate governance have rarely been borne by nonprofit leaders as individuals.* Even when an organization fails, board members are unlikely to have their careers or reputations affected, and the executive director can usually find another job. The big losers are the people or community purpose the organization was designed to serve.

BOARDS GOVERN IN CRISIS, SO WHY DON'T THEY GOVERN ALL THE TIME?

Despite the obstacles and uncertainty, boards strive to perform their governance roles well. They make valiant efforts to read and understand financial statements. They listen attentively to reports about client-centered methodologies and new x-ray machines. They give up Saturdays for board retreats.

When agencies are in crisis, boards go further. They give up weekends to attend emergency meetings where hard questions are asked; they sort out financial problems, and meet with disgruntled funders and clients. They seek out a wide range of informants: funders, staff, colleagues in the field, and members or other boards. When serious charges are brought to boards about CEOs, boards often hire independent investigators or analysts to report on charges of sexual harassment, racial or gender discrimination, alcohol or drug abuse, or misuse of funds. *In crisis, boards realize that while they can't manage, they must govern.* And to do so they need information sources that are independent of executive staff; they need their own, diverse channels of information.

If boards can act to overcome some of their limitations and act effectively as governors in time of crisis, why don't they act that way in normal times?

Some reasons that boards don't govern all the time have been noted: lack of time, lack of independent information, and lack of familiarity with the "business." But in addition, another important factor is at work: a desire to avoid tension and conflict.

When boards act in their governance and oversight roles, uncomfortable questions may be asked; tensions may enter the room. It takes a lot of nerve for a board member to challenge a staff recommendation in a board meeting. New board members are often quiet, waiting until they know more before speaking up. But long-time board members too are reluctant to appear adversarial, not "with the team."

STAFF FREQUENTLY SEE BOARD MEMBERS WITH SERIOUS QUESTIONS AS OBSTACLES AT BEST, ENEMIES AT WORST.

In fact, when asking probing, "tough" questions, board members may feel guilty. Is it fair to question staff competency in fundraising when I've only made an average contribution myself? Is it being distrustful to ask for a list of salaries and comparable salaries in similar organizations? Does my admiration for a competing organization's programs reflect a lack of loyalty to my own organization? A subtle cause of this avoidance of conflict is the emphasis on a smooth working partnership. Boards often view tension as a symptom of an illness that everyone must try to avoid catching. Conflicts should be smoothed over. Staff frequently see board members with serious questions as obstacles at best, enemies at worst. (This is exacerbated when board members who don't do much as supporters still want to ask questions.) As a result, some boards neglect this responsibility altogether and act as a rubber stamp for the director. Just as often, boards will allow one or two members to be the chronic complainers without permitting them any real influence.

The wider nonprofit community has colluded with this avoidance through the scant attention given to the governance role in books, academic papers, and other management literature. A small industry has grown up around board training and consulting. While consultants and trainers have done a great deal to help boards raise more money, they have done little to help boards be more effective as governors. One reason is that they have been hired to help the board support the organization, not to help it govern.

In crisis, the emphasis on a smooth working relationship takes a back seat to the need for action and straight

answers. It is “okay” in a crisis to ask tough questions. In normal times, boards need to learn how to use the authority they are willing to assert in times of crisis.

THE PARADOX AND THE CHALLENGE

The board-staff relationship is a paradoxical one. When acting in their governing role, the board must stand above staff and be the “boss.” But when acting in their supporting role, board members act to support and assist staff-led work.

Some boards become so excited about their roles as governors that they mistake governance for close supervision of management and begin meddling in minor management affairs. In other cases, as boards govern more, they shirk their supporting role. The challenge is to fulfill both roles, not simply switch from one to the other.

In short, boards have some inherent limitations in their ability to govern, including lack of time, lack of familiarity with the field, and lack of material stake. These limitations have been supplemented by the sector’s nearly exclusive emphasis on the board’s supporting role and by a human tendency to avoid conflict. A first step toward an effective board is acknowledgment of the paradox and an understanding of the need to perform both functions equally well. A failure to govern as well as support is a transgression both against clients and against the wider community.

STRENGTHENING GOVERNANCE

Here are some practical ways to strengthen governance:

1. Make sure that, as a board member, you have information about the financial and program performance of the organization that comes from independent sources. Too often boards get all their information from the executive director; they may not realize that the organization is having financial difficulties until too late, or that the organization’s programs are not keeping up with changes in the world. To obtain independent financial information, make sure that the board (or its audit/finance committee) selects the external auditor, hears the auditor’s report, and has at least one meeting per year with the auditor and without staff present. Periodically the board should similarly work with independent program evaluators and outside experts who make their reports directly to the board and the staff jointly. Organizations that are too small to need an audit should make sure that someone outside of staff periodically looks over the financial situation.

2. Use independent management evaluators. In addition to auditors and program evaluators, boards need unbiased sources of information about management as well. One of the most difficult tasks for boards is the evaluation of the executive director. On one hand, a board can’t interview staff about their opinions; but on the other hand, problems are created when a board obtains all its information from the person being evaluated. An independent evaluator might interview staff, and, for example, if there were several allegations of sexual harassment, would report to the board that such charges exist.

3. Make governance an explicit part of meetings. Boards should affirm their responsibilities in both support and governance. Board agendas should be clearly marked “Governance Items,” and “Supporting Items.” Among the qualities we should seek and reward in board members are critical thought, discernment, and a questioning attitude. When someone raises an objection or concern, or votes against the majority, the board president should make a point of expressing appreciation for the seriousness and courage to make the point.

4. Board chairs should encourage dissent, debate, and questions. The board chair should make comments such as the following at each meeting: “Marc, thank you for bringing up the risks involved with this idea,” or “Well, we may all be in agreement... but Crystal, could you serve as our devil’s advocate and give a strong argument for the other side?”

5. Recruit governors. When recruiting, boards should seek members who are good governors as well as those who are good supporters: people who know clients as well

as people who know philanthropists; people familiar with nonprofit management as well as those familiar with business; operational volunteers as well as fundraising volunteers; people who ask critical questions as well as people who cheer. A diverse board such as this

AMONG THE QUALITIES WE SHOULD SEEK AND REWARD IN BOARD MEMBERS ARE CRITICAL THOUGHT, DISCERNMENT, AND A QUESTIONING ATTITUDE.

will keep the agency rooted in the world it serves as well as in the world in which it raises funds. In many cases, governors and supporters may turn out to be the same people once governing responsibilities are recognized and valued as much as supporting responsibilities. **GF**

JAN MASAOKA IS EXECUTIVE DIRECTOR AND MIKE ALLISON IS FORMER ASSOCIATE DIRECTOR OF COMPASSPOINT NONPROFIT SERVICES, A BAY AREA TRAINING, RESEARCH, AND CONSULTING ORGANIZATION TO NONPROFITS. THIS ARTICLE IS REPRINTED WITH PERMISSION FROM THE ONLINE NEWSLETTER, BOARD CAFÉ. FOR A FREE SUBSCRIPTION, GO TO COMPASSPOINT.ORG.

DONOR FATIGUE: *Causes & Cures*

BY KIM KLEIN

I am sitting with the fundraising committee of a small organization that provides a variety of free services to elementary schools. They tutor kids in math and reading, coach various sports, staff libraries, and teach swimming and music. Because of this nonprofit program, the public elementary schools in their community have a library, a small sports program, and a music program — all of which had been cut from public school funding. Prior to the cuts, this group was a tutoring and sports program only, but they gradually expanded to meet the needs of their public schools. They do all this with about 50 volunteers and two (low-) paid staff. They raise their \$150,000 budget from two special events, one mail appeal, a mobile bookstore specializing in used children's books, and a handful of donors who give \$500–\$2,500 annually. Their sources of income are nicely diversified and they have managed to raise about \$25,000 more each year for the last two years with some major gifts and an expanded mailing list. However, they need to grow by at least that much again this year, and they are dubious that is possible. I have just suggested the following as a solution to their shortfall:

- **Add two mail appeals to their fundraising calendar — one in spring and one in early fall — in addition to their current “year-end” appeal.** Each appeal can highlight an aspect of their program. (Goal \$7,500)

- **Add a “donate now” feature on their website and, since they are about to employ a new webmaster, explore a cyber-store to help sell their books and to seek donations.** (Goal: \$1,500 in the first year, growing quickly as they drive more traffic to the site.)

- **Identify all their donors who have given \$100 or more for three years but have not increased their gift and ask each of them to double their gift.** (Goal: \$21,000)

I expect some resistance in the form of the usual reactions I get to such suggestions, such as “That’s so much work,” “Isn’t there a foundation we can write to?” and

“What about asking Oprah Winfrey?” Instead, they bring forth a common, but always surprising, refrain: “We don’t want to wear our donors out.”

Like many small nonprofits, they worry about donor fatigue. The capacity of grassroots organizations to worry about their donors is one of their most endearing qualities and one of the things that has kept me working in this part of the sector for 26 years. I sit in one office after another with organizations that are understaffed and overworked. As government and foundation cuts continue to come at them with the relentlessness of a hailstorm, as they try to stretch themselves to meet great gaping maws of need, they still find time to worry about whether they are wearing their donors out by asking them for money. And they are right to do so.

*I advised them to return
to their mission, because when
they do their work well, they make
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the donors respond by giving.*

Before I go further, let me caution you about one thing: do not confuse donor fatigue with your own fatigue. Particularly in organizations that do the same important work year in and year out (feed hungry people, shelter homeless people, advocate for better health care, rescue abandoned animals, save the environment, organize for fair welfare

policies), you can feel as you write your mail appeals or compose your phone-a-thon scripts or think about what you are going to say in your proposals or to your major donors that there is nothing new to say or report. This is *your* fatigue and it is understandable, but you need to deal with it and not project it on the donor. If you can remain excited about your work, see progress even when it is tiny, see setbacks as opportunities and generally maintain optimism, your donors will be infected by your enthusiasm.

CAUSES OF DONOR FATIGUE

Donor fatigue is real, however, the result of one or more of five elements. The first is that many organizations are using the same strategy to raise money. Direct mail is the main example. People who give or buy by mail receive, on average, 800 to 1,000 unsolicited pieces of mail a year.

Most people I know, including me, sort their mail next to a recycling bin, throwing most of it away unopened. This week alone I declined to save the whales, protect farm workers, stop child sex trafficking, provide health care to indigent seniors, help more women get elected to office, fund breast cancer research, protect the California coastline, or create jobs for people with disabilities. I did this with some twinges of regret — both because I believe in all those causes and because I know how hard it is to raise funds through direct mail. People have become inured to pleas from even the most heart-wrenching cause because they are tired of getting so many of them.

The second — and related — cause of donor fatigue is the existence of just too many causes. The size of the nonprofit sector has doubled twice in the last two decades. If it were a single entity, the nonprofit sector would be the world's seventh-largest economy. If we were a single industry, we would be the nation's largest industry. Almost 10 percent of the workforce is employed in a nonprofit business. The choices of groups and issues to give to have become overwhelming. People are saying “no” based on the strategy and not the cause — “I don't give at the door,” or “I don't give over the phone,” or “I don't give by mail.” It is a defensive mechanism to narrow the range of possible requests.

The third element is loss of confidence in the nonprofit sector. The last few years have seen a lot of scandals, particularly among the larger nonprofits. Donor confidence is much lower than it was even five years ago. “How do I know my money is being well spent?” “How do I know my money is going where it should?” These questions, on top of the questions of which causes to support and how to decide how much to give, definitely add to donor fatigue.

The fourth and fifth causes are the only ones an individual organization can really do anything about, so before I get to those, I want to return to the organization I described at the start.

They (and they are not alone) kindly and rightly don't want to wear their donors out. The solution they propose is to ask only once a year so that donors won't feel deluged by them and not to ask for increased gifts so that donors won't feel they can never be satisfied. But through this strategy, they will shrink into the woodwork, doing more and more with less and less. I said to them, “Why don't you just cease to exist altogether and then you won't have to worry about bothering your donors at all?” Though I said this jokingly, this was the outcome they were headed for.

From a donor point of view, an organization that only asks once or twice a year is an organization that doesn't have a lot going on.

I advised them instead to return to their mission, because when they do their work well, they make their donors most happy and the donors respond by giving — some give more frequently, some give bigger gifts, some invite their friends to give — all because the work is good and the organization asks often enough to stay on the radar of the donor and often enough to raise the money they need. From a donor point of view, an organization that only asks once or twice a year is an organization that doesn't have a lot going on. You have to see your requests for money as a percentage of the requests the donor receives from all the organizations that he or she supports (most people give to between six and 15 groups) and all the organizations that would like that donor's support (likely to be hundreds).

No one organization is the cause of donor fatigue. Even those organizations that insist on sending 14 mail appeals a year, and even those organizations that have wasted money on fancy office space or high salaries or lavish gifts for board members are not the cause of donor fatigue. It is a combination of these factors, and one group opting to ask their donors infrequently is not going to solve it.

THE FOURTH SOURCE OF DONOR FATIGUE

The fourth element of donor fatigue is one of the two that organizations can do something about: not treating donors personally.

Donors feel worn out when they do not feel appreciated. The main complaint I hear from donors is not how often they are asked, but how they are never asked personally. No matter how many years they have been giving or how much money they give, they are rarely called or visited, and they rarely receive a personal note from a board member asking for another gift or an increase in their gift. They receive form letters or mail-merged letters. The message they get is that their gift is not important enough for someone to take time out of their day to talk with them about it.

Even worse is how infrequently donors are thanked. Though everyone seems to agree that a thank you note is a good thing, many organizations don't send them at all, and many more send pre-printed thank you notes, possibly with the donor's name scrawled in where “Friend” was crossed out in the “Dear Friend” salutation.

I have worked in organizations where some donors were not only thanked personally for their gifts, but were asked as often as twice a month for various projects. They

didn't always give, but they liked to be asked. The tone of the request is the critical element. Basically you need to get across this message: "I know you have given recently and generously, and we really appreciate it. I wanted to let you know about this project and invite you to be part of it if you want. You have certainly done your share this year, but I didn't want to leave you out of this if you were interested." The solicitation becomes a chance to educate the donor further about all that you do and an opportunity to thank them again without appearing obsequious. Everyone knows the truth of the saying, "If you want something done, ask a busy person." The same is true about giving, "If you want a donation, ask a donor." Often the person most likely to give you a gift is the one who gave most recently.

The thank you note is an opportunity to appreciate the gift and to create an atmosphere where the donor will be open to being asked again. Form thank you notes are fine if you add a short personal note, "Your gift was such a morale boost," or "I look forward to keeping you posted on our progress with this program." Even if you use a standard thank you for all your donors, vary the language from time to time. At least write a new thank you note each year!

THE FIFTH SOURCE OF DONOR FATIGUE

The fifth and final cause of donor fatigue is another macro problem similar to the first three, but one that even the smallest organization can at least acknowledge and possibly, collaborating with other organizations, work on. It is a problem rooted in national politics. I call it the privatization of the public sector.

We all know that relentless government cutbacks of the last several years are having a huge effect on groups that received government funding. But groups that never depended on such funding are also deeply affected. The reason is this: Organizations that were once publicly supported with government funding and no longer are now must raise money from the private sector, just as nonprofits that were supported entirely by individuals, foundations, and corporations have always done. As a result, institutions that were once fully supported by public funds — public schools, parks, social services, and the like — now compete with traditional nonprofits for private funding. At the same time, because

of the increasing gaps between rich and poor, many social service agencies are experiencing double- and triple-digit growth in the number of people who need their services.

Everywhere I go I hear these stories. In Detroit, food programs are trying to feed more than twice as many people as they did just two years ago; in Mecklenberg County, NC, a food program is distributing food to 70,000 people a week, doubled from 2000. Ditto for people doing job counseling, offering mental health services, providing affordable child care. Many organizations are having

a very hard time keeping up with the enormous increase in demand.

And this stress is felt not just by social service and health organizations, but also by arts and culture, education, and environmental protection groups. No one, except those in the business of weapons development and deployment — and they are rarely nonprofits — is spared. According to a report from OMB WATCH, a nonprofit government watchdog organization, in 2003 state governments faced their worst budget crises since World War II.

Government cutbacks are not just an economic problem, though. They represent a philosophy that began under President Reagan in the 1980s, continued under Bush I, continued to a lesser extent under Clinton, and continue profoundly under Bush II. It is a philosophy of privatization — less government is better government (except when it comes to the military). This means less spending of tax money in areas where the government thinks private funding should be supporting that work. Under this philosophy, federal, state, and local governments are cutting funding with little consequence because the public does

not demand that public schools, public libraries, public pools, public hospitals, or public parks and the like be funded with money taxed from the public. OMB WATCH's Gary Bass points out, "Being silent on tax and budget issues is not an option for those who care about the individuals and communities that the government and nonprofits serve."

The American Association of Fundraising Counsel, which publishes the nonpartisan annual report, *Giving USA*, points out in this year's report that the United States government does less to support health care, education, or the arts than the governments of most other developed countries. This is a serious state of affairs — one that

The main complaint I hear from donors is not how often they are asked, but how they are never asked personally.

Individuals, foundations, and corporations cannot support all that they were supporting before and also take on all that is left when government pulls out.

demands some hard thinking about what taxes are for, how they are raised, and how they are spent. That will be the subject of a subsequent article.

For now, it is important to understand that a major cause of donor fatigue is that donors are being asked to do too much. Individuals, foundations, and corporations cannot support all that they were supporting before and also take on all that is left when government pulls out.

In the next issue of the *Journal*, I will present a fuller discussion of the role of taxes and what your organization

can do to address the vitally important issue of diminishing public support of public services. In the meantime, however, treating your donors well — staying in touch with them and giving them more rather than fewer opportunities to support a cause they obviously endorse — will go a long way toward overcoming any fatigue or indifference they may feel toward your organization and will help generate more dollars. **[GF]**

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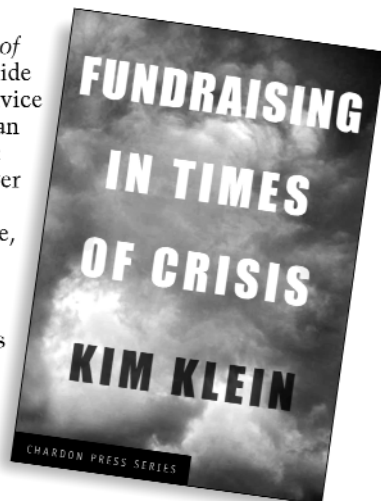
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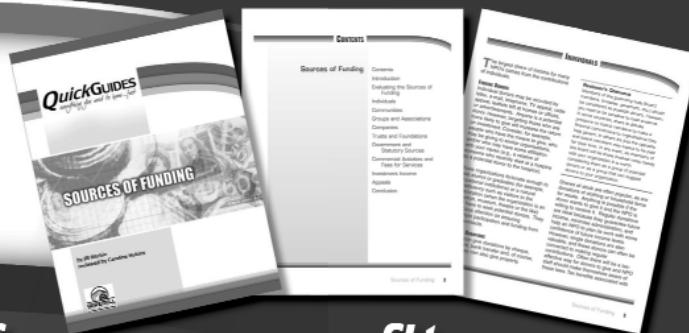
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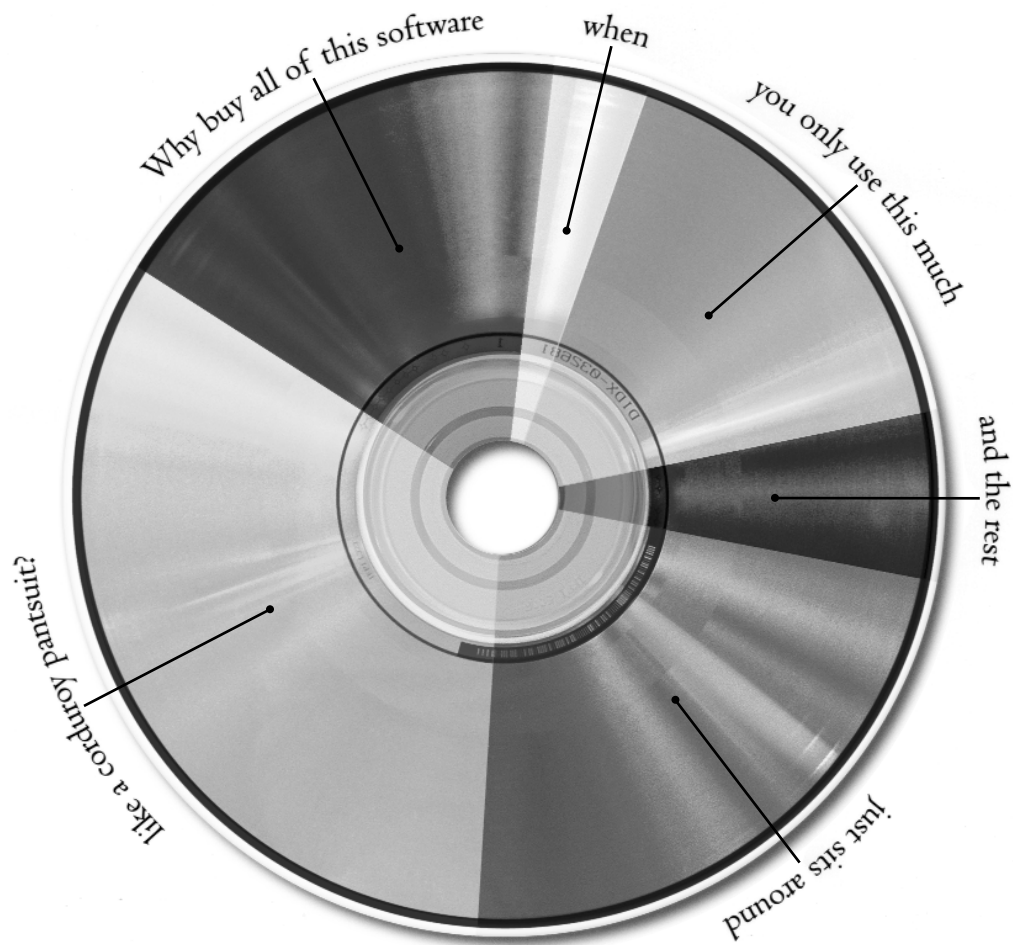
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