

# Grassroots Fundraising Journal

VOLUME 24 ■ NUMBER 5 ■ SEPTEMBER/OCTOBER 2005

*Featuring:*

**The Care & Feeding  
of Volunteers**

BY MICHAEL MCKEE

*Also in this issue:*

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- Planning an Endowment Campaign, PART II



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**On Our Cover** • NEW YORK STATE TENANTS & NEIGHBORS COALITION ORGANIZES AND MOBILIZES TENANTS TO FIGHT FOR AFFORDABLE HOUSING AND TENANTS' RIGHTS. MANY SUCH TENANTS VOLUNTEER THEIR TIME TO HELP WITH PROGRAMMATIC AND FUNDRAISING ACTIVITIES FOR THE ORGANIZATION. IN THIS PHOTO RENT-STABILIZED TENANTS ARE PROTESTING A VOTE BY THE NEW YORK CITY RENT GUIDELINES BOARD TO RAISE RENTS BY EXCESSIVE AMOUNTS.

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# Grassroots Fundraising Journal

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## LETTER FROM THE PUBLISHER

KIM KLEIN

**G**iving USA: *The Annual Report on Philanthropy 2004*, recently issued its 50th Anniversary edition. Every year, this report estimates how much money was given away by foundations, corporations, and individuals the previous year and the types of organizations the money was given to. In 2004, non-governmental organizations and individuals gave a total of \$248.52 billion — that's *billion* dollars. Here's where the money came from:

### Total Giving \$248.52 Billion

FROM	DOLLARS IN BILLIONS	AS A PERCENT OF TOTAL
Individuals	187.92	75.6
Bequests	19.80	8.0
Foundations	28.80	11.6
Corporations	12.00	4.8

As always, individuals gave by far the most money: 83.6% of all money given was from individuals either during their lifetime or from bequests upon their death. There are two pieces of good news here: all giving was up, and for the first time since 2000, giving by all sources exceeded the rate of inflation. It's interesting to learn from this report that income in 90% of U.S. households is less than \$100,000 — *and* that most individual giving comes from these households.

As has always been true, religious organizations received the bulk of donations: some 35% of the total. There are many reasons for this, but the main reasons are that religious groups are not embarrassed to admit that they need money and they ask for it — frequently.

More highlights from *Giving USA* can be found at [www.aafr.org](http://www.aafr.org).

The fact that the overwhelming bulk of charitable giving comes from individuals remains for me one of the ten most interesting things I have ever learned. Since I first heard this fact (in 1976, when total giving was a mere \$31 billion), I knew that I would always focus 80% or more of my fundraising attention on 80% or more of the money, which meant focusing on individuals.

Our three articles in this issue focus on individuals as well. Lauren Goldstein concludes her article on budgeting for Special Events from her excellent new book, *The Special Events Tool Box*, and long-time *Journal* subscriber (and donor) Michael McKee of Tenants & Neighbors writes about their success in using volunteers. I continue exploring endowment campaigns, with a look at campaign logistics.

Finally, there's still time to lobby for your all-time favorite article to be included in the 25th anniversary issue of the *Grassroots Fundraising Journal*, coming out in January, 2006. (Contact me at [kimklein@grassrootsfundraising.org](mailto:kimklein@grassrootsfundraising.org).) Your group can also place a tribute ad in that issue to help us celebrate. (See page 15 for details.)

In anticipation of our 25th anniversary, and in honor of our third year of operating as a nonprofit, we have published a brief "Special Report" about the *Journal*, with all you have ever wanted to know about our history, staffing, finances, and probably a lot more! Download it from [www.grassrootsfundraising.org](http://www.grassrootsfundraising.org). And while you're at the website, check out all our free articles and advice, and sign up for our free monthly e-newsletter, with more fundraising tips from the *Grassroots Fundraising Journal*.

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# *The Care and Feeding of Volunteers*

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BY MICHAEL MCKEE

As with many nonprofits, the organization I helped found thirty odd years ago, Tenants & Neighbors, relies heavily on volunteers. We are a statewide (New York) membership organization that engages primarily in organizing, advocacy, and policy work to promote tenants' rights and affordable housing at the federal, state, and local level. We also provide technical and organizing assistance to tenant associations, especially those in government-subsidized developments at risk of conversion to market rents.

*We recruit volunteers in different ways: from speaking engagements, by soliciting for volunteers in our newspaper, and above all from our organizing and advocacy work.*

We encourage our members and supporters to become volunteers. In fact, we rely on our volunteers to carry out our fundraising and programmatic goals.

It seems to me that many nonprofits unnecessarily limit their thinking about volunteers. They tend to see volunteers as people who either fold and stuff or who assist with fundraising activities, such as helping produce special events, participating in phonathons, or sponsoring house parties. But do nonprofit staffers see volunteers as players with a stake in the organization? Too often, I fear, the answer is no.

At Tenants & Neighbors we try to develop a relationship with our volunteers. As a result, many of our volunteers help carry out programmatic activities and support our programmatic work as well as our fundraising efforts. Some volunteers function in more than one capacity. Many have also participated in focus groups we have organized or filled out surveys about the organization, giving them an opportunity to influence our programs and goals.

About ten years ago we decided to get serious about grassroots fundraising. At the time, our membership comprised about 1,500 individuals and 90 organizations, and our budget had ranged from \$40,000 to \$90,000 per year. Using direct mail and telemarketing, we grew dramatically — to a high of 20,000 individuals and 160 organizations. (When we are not in campaign mode and our issues are not in the

headlines as often, the individual memberships decline.) You will no doubt understand that the *Grassroots Fundraising Journal* became our bible in this endeavor. We also received invaluable technical assistance from some experts, foremost among them Kim Klein and Stephanie Roth.

Raising foundation funds for statewide organizations is difficult at best, nor is tenant organizing high on the list of priorities for many funders. Our grassroots income helps insulate us against downturns in grants. In any given year

we raise between \$250,000 and \$500,000 in gifts from individual tenants, tenant associations, labor unions, and other individuals who support our work.

Despite our growth, like most nonprofits, we never have enough staff. So we spend a good deal of effort to recruit, develop, and cultivate volunteers. In effect, their work augments our staff resources and, to a degree, substitutes for additional staff that our budget doesn't allow us to hire.

At any given time, we have a pool of about 200 members and supporters we can call on for help. We also have a smaller "core" group of 30 to 40 volunteers who offer their time on a regular basis, including two volunteers who are, in effect, half-time staff members.

These two most committed volunteers for the past few years are a loft tenant, who produces our weekly cable television program, and a retired political director of a labor union, who is a rent-stabilized tenant and serves as our liaison to the labor movement.

In times when we are in campaign mode, for example when we're organizing to pass legislation, our volunteer pool becomes larger, as does our grassroots income. During campaigns dozens of volunteers staff phone banks as we call targeted voters in a particular legislator's district or call our "active members" list to turn people out for a rally. We have volunteers who go out on speaking engagements as well as volunteers who come to weekly mailing parties and help out with office work.

We recruit volunteers in different ways: from speaking engagements, by soliciting for volunteers in our

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newspaper, and above all from our organizing and advocacy work. Some volunteers find their way to us. Quite a few are recruited by other member-volunteers. Many of our volunteers are involved in their own tenant associations, where they also put in long hours.

The rest of this article provides some ideas for nurturing volunteers so that they will want to keep on working with your organization and for dealing with different kinds of volunteers so that both you and they have a productive experience — or minimize a negative one.

## MAKING SURE YOUR VOLUNTEERS COME BACK

Over the years I have made some observations about working with volunteers which, when translated into practice, help with volunteer retention.

- ***The volunteer's time and work are a gift to your organization, just as checks from donors are a gift.*** Most of our volunteers are dues-paying members, but some of our best volunteers are very-low-income people who can't make financial contributions but who invest hours of their time in the organization. We consider these volunteers as much members as people who write checks, and we give them all the benefits of membership. Since appreciation is the most important key to retaining volunteers, this is one way you can show appreciation for your volunteers.

- ***Always thank your volunteers every time they pitch in.*** Beyond any other recognition, thanking volunteers for their time and efforts each time they work for you is crucial. Even though the volunteer donates time because he or she believes in your organization, people like to be thanked.

- ***Just as you exercise caution in hiring staff, apply some judgment in "hiring" a volunteer.*** Don't make facile judgments about a potential volunteer's abilities. Some time spent interviewing a potential volunteer might reveal talents that are not initially apparent. Of course, you don't have to exercise the degree of caution you need in hiring a salaried staff member, as it's generally easier to "fire" a volunteer if things don't work out. In fact, most volunteers fire themselves when the relationship doesn't gel.

- ***Match the volunteer to her ability.*** People who are comfortable talking to strangers on the phone are a valuable resource, whether doing fundraising or programmatic work. Someone too shy to talk on the telephone might love being part of a mailing party. Someone else might find folding and stuffing boring. It might not be immediately apparent what role a volunteer can fill, but go over the variety of tasks needed with someone who has shown an interest in volunteering to see which ones she might find interesting or rewarding.

- ***People often have more abilities than they recognize.*** Every June there is a national conference of HUD tenants in Washington, D.C., and every winter we offer workshops on fundraising strategies to help tenant associations raise enough money to send one or two representatives to the national conference. The tenants often come up with their own ideas. One tenant association, after two or three

***Even though the volunteer donates time because he or she believes in your organization, people like to be thanked.***

years of unsuccessfully soliciting contributions door to door and at building-wide meetings, hit upon the idea of sponsoring a series of social events once every month or two. No one is asked to contribute or pay dues. Rather, tenants pay a modest fee at the door of the event, enough to cover the cost of refreshments, and once inside can buy chances or tickets on various games and contests. One of this tenant association's most successful fundraisers was selling tickets allowing the purchaser to guess the number of jelly beans in a giant glass jar, gussied up with ribbon. This was run as a 50/50 raffle, with the winner pocketing half the sales and the tenant association the other half. It was a fun evening and the association netted \$400, two-thirds of the cost of sending a representative to Washington.

- ***Volunteers reinforce each other.*** Working together helps folks more readily overcome their doubts and get into the spirit. A few years ago we asked our board members to sign up for one evening a week for three weeks in November to make calls to major donors soliciting year-end contributions. It probably won't surprise you that some board members were hesitant. We prepared a script and did a brief training.

Once the calls began, however, it became a friendly competition, with phoners trying to see who could solicit the largest gift. There was a great deal of excitement the first evening when a board member secured the first \$200 pledge. The other board members crowded around to examine the pledge form, then went back to their phones determined to match or better the goal. Those who had been uncomfortable about asking for money really got into it. To my astonishment, when we stopped the calls at 9:00PM two board members said, "That was fun," and asked if they could come back an additional evening the same week. Fortunately, we had enough phone lines, although on a couple of nights we had to use the fax line to accommodate everyone!

As Kim Klein says, no one likes asking for money, but people sometimes surprise themselves. So don't let board members off the hook too easily — give them enough

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support and a comfortable atmosphere and they will often rise to the occasion.

- **Your volunteers are not robots.** People don't appreciate being treated impersonally. Spend some time with your volunteers. As you get to know them, you will hear interesting life stories and occasionally observations about your organization. When we have a mailing party, I try to spend at least 15 to 20 minutes sitting with the group and helping fold and stuff, no matter how busy I am. The conversation is time well spent and reinforces the relationship.

## *We also recognize some volunteers at our annual meeting or other events and in our newsletter.*

- **Volunteers are messy.** Volunteers put half-empty coffee cups in your recycle bin, leave dishes unwashed in the sink, and commit other sins. After all, until they become regulars, they don't know your office systems. If you can't put up with a bit of untidiness, you might find it hard to work with volunteers, but this is a trade-off worth learning to live with.

- **Make your volunteers comfortable.** Offer them a soda, or coffee or tea. Make sure they know where to find the water cooler — and the restrooms. Many people are shy and won't ask. Some might even think they're not allowed to use the water cooler.

- **Honor your volunteers occasionally.** At the end of a campaign, whether we win or lose, we have a party just for our volunteers. We also recognize some volunteers at our annual meeting or other events and in our newsletter. By honoring one or two special volunteers each year — and making sure it is different ones every year — you show all volunteers that you are aware of their efforts.

## **VOLUNTEERS COME IN ALL VARIETIES**

Volunteers come with different qualities, different skills, different tolerances for specific jobs, and different levels of commitment. Here are some of the kinds of volunteers you'll find and how best to work with them — or when to cross them off your list.

### **Special Volunteers with Special Skills**

If you find a volunteer who has a skill that you might otherwise have to pay for or do without, count yourself lucky. Over the years we have benefited from the services of Jeff, a professional graphics artist who designed our newspaper for three years; Russell, a retired costume designer who established and maintained a newspaper clippings file; Eric, a computer-savvy attorney who designed a new relational database for us; Judy, the retired

political director of a labor union who helped us reach out to labor unions and develop relationships with several of them, eventually gaining their financial support as well (and who still serves as our labor liaison); and Joan, an executive secretary who sat for hours at a time doing data entry.

Dave, a retired sign painter, makes excellent posters for demonstrations and rallies. We met him at a rally during our big 1997 rent regulation campaign, and he has created our posters ever since. Tenants & Neighbors has become known for our terrific graphics on picket lines, and people now know it's us when they see Dave's signs in newspaper photos or on TV.

Three highly dedicated and knowledgeable volunteers and a group of five or six others who can be recruited occasionally are involved in our weekly call-in program on community access cable television. Two of the volunteers, including Janet, the producer, have been with this project since we began it in 1997.

Of course, there are functions that cannot be achieved without hiring staff or consultants. I fantasize about finding a volunteer to update and maintain our website on a regular and timely basis, but realistically, this is something we will probably have to pay for.

### **Interns**

There are some programs, often affiliated with universities, through which nonprofit organizations can obtain "free" staff in the form of student interns. But be careful: some interns chew up your staff time because they don't have the knowledge or ability to perform without constant supervision.

Experience has taught me to shy away from students whose classes require them to work with a community organization for a semester, typically for a few hours each week. While occasionally you get a winner, more likely you will spend hours educating and cultivating the intern, only to scrap their work or do it over then have them disappear by the time they have learned enough to be of use.

On the other hand, if you give a finite project to a good student who only has a few hours a week, it can work out. A junior who was majoring in sociology did a telephone survey of several of our best tenant leaders, soliciting their opinions on a range of subjects. The survey was an eye opener, giving us valuable insights. The leaders told the student things they probably would have hesitated to tell us, including criticisms of our campaign strategies. Graduate students tend to be more valuable than undergraduates.

A final tip: with rare exceptions, the only ones who seem to be able to write coherent sentences tend to be journalism students.

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## Other Institution-Based Volunteers

For several years we have benefited from the Jesuit Volunteer Corps, through which we are assigned a full-time staff person for a year. This program has sent us one winner after another. All but one of our JVs have been young people just out of college, and all have been highly motivated by the opportunity to work for social change. We pay a \$500 monthly stipend and provide health insurance and travel money. Not a “free” additional staff member exactly but a real help.

The JVC program does a good job of recruiting and screening capable people, and what’s more, the program seems to do a good job of providing support to young people who are in the process of becoming community organizers. Communities of JVs live together in voluntary poverty while engaging each other in regular discussions on the meaning of community and solidarity and on the values that motivate them in their work. (JVC — [www.jesuitvolunteers.org](http://www.jesuitvolunteers.org) — is a national program with regional offices.)

We have had less success recently with VISTA/Americorps volunteers. Back in the 1970s we had eight terrific VISTA volunteers doing tenant organizing in five upstate cities, until Ronald Reagan terminated our contract three weeks after his 1981 inauguration. But our experience with the revived Americorps/VISTA program during the 1990s was negative, and after about 20 unsuccessful hires and only two successes we gave up on it. After a few years we considered trying again with a new approach based on what we had learned by examining other more successful VISTA placements. But by the time we were ready to move forward, the Bush administration was

***If you determine that what is offered is not what the organization needs, you have to say so without equivocation.***

making it much more difficult for organizing groups to get VISTA volunteers.

There are other programs that might be worth checking out, such as those that recruit retired business executives or senior citizens to help nonprofits. But be realistic about what volunteers can and cannot do. Where is that website volunteer?

## Problem Volunteers

Some people just don’t make good volunteers. Here are some obstacles I have encountered and how I dealt with them — skillfully or not.

## *The volunteer who doesn’t play well with others*

We have had to “fire” an occasional volunteer who can’t work well in a group. I remember “Steve,” who came regularly to our weekly mailing parties (during campaigns

***Some time spent interviewing a potential volunteer might reveal talents that are not initially apparent.***

we designate an afternoon a week for this activity, so that people get used to coming the same time each week). Steve was a fast and steady worker, but he was opinionated and argumentative. Good volunteers stopped showing up. The problem wasn’t hard to figure out. I had an awkward conversation with the gentleman during which I told him he needed to stop picking arguments or not come back. With that, he launched into a tirade, then stormed out of the office, never to be heard from again. Later I realized there might have been a better way to address this problem, such as suggesting he take on an individual project on a different day. After Steve’s departure, it was easy to persuade other volunteers to come back.

This experience taught me to pay attention to who gets along with whom. When we have a small mailing needing two or three volunteers, we try to match people accordingly. Be observant. Be on the lookout especially for bigots and sexists on the one hand and for friends who like to work together on the other. And remember, many people are shy and won’t complain. They will simply suffer, or more likely just stop showing up.

## *The volunteer who runs hot and cold*

This is usually a valuable volunteer who has abilities but has to be coaxed. You have to decide if it’s worth the time. My experience is that you either work out an understanding about a task and a time commitment or the volunteer doesn’t come back.

## *The volunteer who won’t do “menial” work*

Some people feel it’s beneath them to fold and stuff. Some even think making phone calls is unworthy of their talents. Mailings and phone banks are our life blood, so I tend not to waste a lot of time on people like this. Such a person has to be really skillful in some other capacity to be worth the time, and even then the relationship may not work out.

## *The volunteer who offers services you can’t use or who has “brilliant” ideas and insists you adopt them*

This type of volunteer is often a variation of the “no menial work” type. It might be worth some time to consider

new ideas (of course, often these ideas are not new at all), and it's important not to dismiss someone too quickly. But if you determine that what is offered is not what the organization needs, you have to say so without equivocation. Some of these people are persistent and even quarrelsome. Don't waste too much time turning them down.

***The volunteer who becomes indispensable — and obnoxious***

In the thirty-five years I have worked as an organizer, executive director, and associate director, this has happened to me twice. Both instances involved extremely talented and highly organized individuals who assumed more and more responsibility, taking over important

and their contributions were valuable. But there is a law of diminishing returns with such people. If my foresight were as good as my hindsight, I would have seen the inevitable ending far sooner.

***The volunteer who doesn't remember she volunteered***

During campaigns, we distribute a volunteer form at meetings. This is separate from our membership application and asks people to indicate activities they might be willing to perform: phone banking, mailings, attending demonstrations, sponsoring a house party, serving as a building captain, and so on (hardly anyone ever checks the house party box). We have learned that unless you do follow-up calls soon after the meeting, many people forget that they said they would volunteer. Others just don't mean it. It's easy to check a box, but when it comes to making the trip to the phone bank, the real decision becomes apparent.

***Not only do [volunteers] help do the work, they help keep you from becoming too "staff-driven" and serve as a sounding board and reality check.***

functions, but who were also difficult personalities. One was a straight man who had a serious problem getting along with those he considered beneath him, which included just about everyone and especially women. We finally had it out over his behavior toward his office mates. He walked, and I was enormously relieved to be rid of him, although now faced with covering the bases he had occupied. The other indispensable volunteer was a gay man who, whenever I asked him to do something, answered, "Yes, my liege," usually with a sardonic curtsy. Enormously talented and capable, he was also a gossip and troublemaker. Eventually he stopped volunteering when we failed to accept his ideas for implementing a new project.

With both these men, I put up with a lot in terms of their personal behavior, as did other staff members and volunteers, because they became virtually full-time "staff"

**IT'S SELF-EVIDENT**

Volunteers are an important asset to a nonprofit organization. Not only do they help do the work, they help keep you from becoming too "staff-driven" and serve as a sounding board and reality check.

It is interesting that virtually all of our volunteers describe their activism in similar terms. Again and again they will say that they don't understand why anyone would not consider housing to be the most important issue facing society. For them, self-interest as tenants and compassionate belief in the value of preserving affordable housing are perfectly fused. **GF**

MICHAEL MCKEE IS ASSOCIATE DIRECTOR OF NEW YORK STATE TENANTS & NEIGHBORS COALITION. HE CAN BE REACHED AT MICHAEL@TANDN.ORG OR (212) 608-4320, EXT. 303.

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## PART II

# Managing a Special Events Campaign Budget

BY LAUREN GOLDSTEIN



**EDITOR'S NOTE:** This is the second part of an excerpt from the new book, *The Special Events Toolbox: A Nuts-and-Bolts Guide to Planning and Implementing Successful Special Events Campaigns for Nonprofit Organizations*, by the principal of Cause Effective. Part I suggested planning special events in the context of what the author calls a “special events campaign”; that is, thinking about all the events you may want to do over a whole year. Planning this way lets you view all possible events within the context of your overall goals and your goals for each one. That article covered preparing budgets for the campaign and for each event and included a budget checklist and a worksheet showing a sample organization’s budget for four events over a year’s time. Part II begins with information on how that organization would evaluate the risks of each event in order to decide which events to carry out, and how to minimize the chance of losing money.

### ANALYSIS OF FINANCIAL RISK

As you know, most special events carry some degree of financial risk. It is important to calculate that risk before you completely commit to a special event. Risk analysis is not complicated if you follow these steps:

**1. Determine the worst conceivable financial outcome of a special event**, such as a snowstorm forcing you to cancel your event at the last minute or some other reason it cannot be held, and calculate what the resulting financial consequence will be. That is your financial risk.

**2. Determine whether the organization can afford that risk.** In other words, if you were to lose that money, would you go out of business?

**3. Determine whether there are ways to reduce that risk**, such as purchasing various types of insurance, lining up personal guarantees on expenses, or consignment purchasing — as well as the benefits (financial and non-financial) to be realized.

**4. Consider all of the above and determine if and how to proceed.** Let’s take as an example the Regional Arts Association’s plans for a campaign of four events presented in Part I. The organization had put together an income and expense budget for four events over one year: a production of *West Side Story*, two house parties, a gala dinner-dance, and a picnic. The development director went through the

risk analysis steps described above and came up with the following thinking about each of the questions.

**What is the worst conceivable financial outcome of each special event?** The worst possible outcome is to lose everything we have spent on the event if the event is cancelled at the last minute. The total expenses for each event are:

<i>West Side Story</i>	\$15,560
House Parties	\$1,531
Gala	\$21,405
Picnic	\$ 4,049

**Can our organization afford to accept this financial risk?** Taken one at a time, we can afford this risk. If we were to lose \$21,000 on the gala, we wouldn’t be happy. We wouldn’t go out of business, but we probably would have to cut programs. If the worst case scenarios happened for both the gala and *West Side Story*, we would have more serious trouble. However, the two events are far enough apart that if the theatre event were to fail we would have time to reevaluate our ability to handle the risk of the gala.

**Are there ways to decrease the financial risk?** The risk is already slight. We can all but eliminate risk for the theatre production, provided we arrange alternate dates with the auditorium. The extra out-of-pocket costs would be renting the auditorium again (\$600 for the three nights) and some administrative overhead.

## Mid-Planning Financial Statement

URBAN PEOPLE EMPOWERMENT PROJECT STREET FAIR  
Statement as of 04/20/2005 (Event Date: 05/13/2005)

INCOME	BUDGET	ACTUAL	VARIANCE
Underwriting/Sponsorship	\$1,500	\$1,100	(400)
Vendor Fees	3,800	1,800	(2,000)
Donations	300	50	(250)
Sales			
T-shirts	800	0	(800)
Hats	600	0	(600)
Food	2,500	0	(2,500)
Raffle	3,200	300	(2,900)
In-Kind			
Entertainment	500	0	(500)
Advertising	400	100	(300)
Photography/Video	300	0	(300)
<b>Total Income</b>	<b>\$13,900</b>	<b>\$3,350</b>	<b>(10,550)</b>
<b>EXPENSES</b>			
Photography/video	400	0	400
Printed Materials			
Raffle Tickets	75	75	0
Posters/Flyers	700	812	(112)
Banner	200	0	200
Advertising	575	175	400
Production			
Sound	300	0	300
Stage (incl. personnel)	700	350	350
Permits	25	25	0
Toilets	350	175	175
Clean-up crew	250	0	250
Walkie Talkies	50	0	50
Security	300	150	150
Entertainment	1,000	0	1,000
Postage and Mailing			
Postage	75	47	28
Messenger	75	30	45
Sales/Merchandise			
T-shirts	300	235	65
Hats	200	247	(47)
Food	500	0	500
T-shirts/Hats for staff	250	193	57
Insurance	300	300	0
Accounting/Legal	250	0	250
Staff time	1,200	1,975	(775)
Miscellaneous	300	12	288
Contingency	500	0	500
<b>Total Expenses</b>	<b>\$8,875</b>	<b>\$4,801</b>	<b>4,074</b>
<b>NET</b>	<b>\$5,025</b>	<b>(\$1,451)</b>	<b>(6,476)</b>

**NOTE:** Your budget is a tool that should be used throughout the planning of your event. As necessary, make adjustments to the budget and add an "actual" column as you begin to incur expenses and bring in contributions. For interim planning and final financials we also include a variance column. This tool enables you to determine what is left to raise and spend and to measure the financial success of the event. It will also help with future planning.

We could reduce the risk of the gala by persuading some of the larger donors to guarantee their donation even if the event is canceled. Four of the people who we expect to buy "President's Circle" tickets are good friends of ours, as are all of the prospective "Benefactors." If they all were to make that guarantee, we would have \$12,000 committed. In addition, the general contributions and journal income would account for another \$9,500. This

## Special Event Budget Analysis Worksheet

SPECIAL EVENT: \_\_\_\_\_ EVENT DATE: \_\_\_\_\_

BUDGET PREPARED BY: \_\_\_\_\_ DATE PREPARED: \_\_\_\_\_

Income*			
CATEGORY	BUDGET	ACTUAL	VARIANCE
<b>TOTAL INCOME</b>			
Expenses			
CATEGORY	BUDGET	ACTUAL	VARIANCE
<b>TOTAL EXPENSES</b>			
<b>NET PROFIT (LOSS)</b>			

\* Note In-kind with asterisk (\*)

cuts the risk in half, which we could handle. If the event were canceled, other donors could be asked after the fact, further reducing the loss. If we take these steps we could definitely assume the risk.

### Mid-Course Review

Throughout the campaign, it is useful to return to your budget, updating it often and checking actual expenses against budgeted ones, as in the example at left.

### After the Campaign

After the campaign, draw up a final budget analysis showing budgeted, actual, and variance figures for each budget item. This will be an invaluable tool for helping you plan for the following year's campaign (see worksheet above).

### FINAL THOUGHTS

Given the importance of budgeting, we often are surprised how little time some of our clients devote to it — even on big events. Don't fall into this trap. Budgeting takes time, but it's a worthwhile investment. Simply put, if you budget carefully you'll have a better understanding of what you will spend and earn. Ultimately, this knowledge can make a difference in the success of your campaign. **GF**

LAUREN GOLDSTEIN IS FORMER EXECUTIVE DIRECTOR OF CAUSE EFFECTIVE, A NONPROFIT GROUP THAT HELPS NONPROFITS PLAN AND IMPLEMENT SPECIAL EVENTS, TRAIN AND DEVELOP THEIR BOARDS, MANAGE INDIVIDUAL DONORS, ENLIST AND MANAGE VOLUNTEERS, AND PROMOTE AND MARKET THEIR ORGANIZATIONS. TO ORDER *THE SPECIAL EVENTS TOOLBOX* GO TO WWW.CAUSEEFFECTIVE.ORG.

# Planning *an Endowment Campaign*

BY KIM KLEIN

In the first article in this series, which appeared in the last issue of the *Journal*, we discussed what an organization needs to have in place to set up an endowment. In this article, we will look at the first steps in carrying out a campaign to develop an endowment.

Before we get into the how-to's, there is an interesting historical footnote here. One of my mentors, the late Hank Rosso, always said that the phrase "endowment campaign" is an oxymoron. A campaign, he would point out, begins and ends and has a goal. The goal is then broken down into parts and is summarized in a gift-range chart that notes specific gifts to be sought. An endowment, on the other hand, is a never-ending, open fund that can continue to receive gifts and for which there is no upper or lower limit on gift amounts and no gift sizes suggested. Further, endowments are traditionally funded by estate gifts, whereas campaigns, whether capital or annual, are funded mostly by gifts given during the donor's lifetime. "An endowment is like a cathedral," Hank pointed out. "It is never finished."

Hank's perspective was formed from working primarily with organizations that everyone agreed needed to exist forever — hospitals, museums, universities, parks, and the like. People did not seem to leave money to organizations that had no existing endowment; so how could an organization start an endowment?

This conundrum gave me the idea that there could be a new way to think about raising funds for an endowment — through a time-specific campaign that, like an annual campaign or a capital campaign, would have specific goals and set out to raise specific amounts of money from a variety of prospects. This money would serve as seed money that could then be added to over time.

Here's an important way endowment campaigns differ from simply starting an endowment program: gifts sought during the campaign are from donors who will give over the next few years; gifts through estates are not the focus of the campaign.

In 1989 I proposed doing an "endowment campaign" to the Funding Exchange (a coalition of progressive community foundations). At first, with visions of sugar plums but little sense of reality, we set as our goal to raise \$15 million over five years. The \$15 million might have been possible, but after only a few months it was clear that we could not sustain the campaign for five years. We modified the goal to be \$10 million over three years and formally launched the campaign.

I served as the chief fundraiser for this endowment campaign, which was one of the first times these two words had been joined. Many fundraising professionals advised against trying to raise an endowment of this size in a specific (and what they saw as a short) time period, citing a number of obstacles: donors need a lot of time to think about making endowment gifts, we were not institutions that people assumed needed to exist forever, and we were a coalition of 14 small organizations, the bad reputation of any one of which could bring down the whole. Moreover, the largest foundation in our coalition raised, at most, \$500,000 a year.

We forged ahead, however, because most of our donors were younger people with inherited wealth who did not need years and years to consider a gift from assets, and because those who were familiar with the community foundations saw no end in sight to the need for their work. The endowment campaign also helped us put stricter standards in place for each local fund of the Funding Exchange, ensuring that money given would be well used and stewarded.

We were aware that failure would have been, to say the least, embarrassing. But we also had what seemed to us a solid plan, and we decided to see if we could make it work. As with any new venture, we of course made many mistakes along the way, but in the end we met our goal.

What we learned in that campaign has become a model for many other organizations to launch their own endowment campaigns; these organizations have added

**"An endowment is like a cathedral,"  
Hank [Rosso] pointed out.  
"It is never finished."**

information and stories to the knowledge base. Endowment campaigns have now become so common that it is hard to remember a time when “endowment” and “campaign” were words that would not appear together.

Hank died before the successful Funding Exchange campaign was over, but he was an innovative thinker and devoted to seeing grassroots groups raise large amounts of money. I like to think he would be pleased with this new chapter in fundraising.

*A note of caution:* Organizations with a donor base of very-low-income people need to think twice before launching an endowment campaign. Even if such an effort could be successful, it means the organization will end up with a kind of financial security that few if any of its supporters have. This can exacerbate a danger present in all endowments: a perception on the part of donors that the organization doesn’t need annual gifts and that in fact, the organization has lost touch with its base. A further danger is that donors will give to the endowment instead of to the annual fund. In that case, as the saying goes, you will have robbed Peter to pay Paul.

## GETTING READY FOR THE CAMPAIGN

The process of getting ready for an endowment campaign may take months or even a year. The questions raised by initiating an endowment campaign require strategic planning to answer, as they have serious implications for program, staffing, board development, and so on (see sidebar at right). Organizations find that they learn a lot more about their board, staff, and volunteers than ever before just by raising these questions.

This learning is important, but it will take a committed team with a clear understanding of what lies ahead to conduct a successful endowment campaign.

An endowment campaign has the same structure as an annual fund campaign, a major donor campaign, or a capital campaign: it has a financial goal, with a gift-range chart and a time line for how to meet that goal. For all the similarities of the steps, however, in each of them there are subtle and not-so-subtle differences between endowment campaigns and other kinds of campaigns.

Carrying out an endowment campaign includes forming a committee of solicitors, compiling a list of prospects, and developing creative materials that describe the campaign and its benefits. Then, the prospects are prioritized and solicitation begins.

## Two Important Questions

In the first article in this series, we discussed two critical questions that an organization needs to think about before raising money for an endowment:

- ***Does everyone in the organization agree that your group should exist permanently?***
- ***What will endowment income be used for?***

Some groups spend up to a year doing the work to answer these questions. For an in-depth discussion of this planning phase, see *GFJ*, Vol. 24 No. 4, July/August, 2005.

### STEP 1: SET A GOAL AND A GIFT-RANGE CHART

Once you have established a goal for your initial endowment efforts, you’ll be able to plan out how to raise that amount of money.

#### The Goal

To determine a goal for your endowment campaign, you need to decide how much annual income you want the endowment to provide and how much principal it will take to generate that amount of interest. A financial adviser will be able to help you with projections.

Generally, an organization can safely assume that they can take the equivalent of 5 percent of the principal out every year and still maintain principal. What this means for an organization is simple: to generate \$50,000 a year will require an endowment of around \$1,000,000; to generate \$200,000 a year will require an endowment of about \$4,000,000. As you can see, an endowment is not a quick fix to a cash flow problem!

There are two ways to think about getting to your goal: one is to conduct a campaign for that goal. If you need \$1 million, your campaign goal is \$1 million. If that is out of your reach right now, but you think you could get to, say, \$250,000, the second method is to conduct a campaign to “seed” your endowment fund. You raise a decent amount of money and do not draw anything out of it until it gets to the goal you want. Once the campaign is

ended you keep raising endowment funds as part of your fundraising work, but without the intensity of a campaign. Having some money raised will help donors feel more assured that their endowment gift is joining existing money and therefore that the endowment is a real entity.

The problem with the “seeding” approach, however, is that too often the endowment does not grow beyond

**It is usually not worth the effort of starting an endowment to raise less than \$500,000 in principal.**

**A further danger is that donors will give to the endowment instead of to the annual fund.**

the small amount raised by the campaign. The endowment principal is not enough to generate the kind of interest that will really help with the annual fundraising crunch and, because donors were told their gifts were going to an endowment, it would be unethical to spend the money raised.

If you decide to seed an endowment with a campaign, then, be sure that you have a plan in place for having the endowment grow after the campaign is over.

Sometimes groups just want “something to take the edge off”— the “stiff drink” approach to endowments. They want a pot of money that generates \$5,000 to \$10,000 a year, so they only need \$100,000 to \$250,000 set aside. An endowment campaign is not the vehicle to raise this small amount of money. For any need of less than \$25,000, an organization should simply increase its annual fundraising goal, perhaps by diversifying to a new strategy or being more aggressive with current donors. It is usually not worth the effort of starting an endowment to raise less than \$500,000 in principal.

Of course, however much money you decide to raise in your campaign, you should always be seeking and accepting additional endowment gifts. But keep your endowment moving by setting a large enough goal to be meaningful.

**A pledge of \$28 per month,  
which is relatively affordable,  
in three years adds up to \$1,000.**

### The Gift-Range Chart

Once you have a goal, you need to create a gift-range chart. A chart of gifts to seek in order to raise \$1 million is shown below. With an endowment campaign, the amount you seek in the lead gift is generally 20 percent of the goal (in an annual campaign it is usually 10 percent) and all the gifts are fairly large. When you establish the top end of your gift-range chart, figure that one gift is to equal 20 percent of the goal, two gifts each equal 10 percent of the goal, and three to five gifts make up the next 10 percent of the goal. In this way, only six to eight donors contribute 50 percent or more of the total goal.

**Goal: \$1,000,000**

GIFT SIZE	NUMBER OF GIFTS	PERCENT OF TOTAL
\$200,000	1	20%
100,000	2	20%
50,000	4	20%
25,000	5	12.5%
10,000	10	10%
5,000	20	10%
2,500	20	5%
1,000	25	2.5%
<b>Total Gifts</b>	<b>87</b>	<b>100%</b>

Generally, gifts of less than \$1,000 are not sought (although all gifts are gratefully accepted). Because donors have several years to pay off these gifts, \$1,000 is affordable for even lower-income people. For example, a pledge of \$28 per month, which is relatively affordable, in three years adds up to \$1,000.

### STEP 2: CREATE THE TIME LINE

The time line for an endowment campaign is usually not less than two years and definitely not more than five. It begins after the discussions of whether to do a campaign and the time taken for a feasibility study (more on feasibility studies later in this series), and includes the time for researching prospects and developing materials.

Two years is the minimum because it usually takes the best part of a year just to solicit the lead gifts (many of the lead donors will have to be talked with several times) and to create appropriate materials; it can take another year to solicit all the other gifts. Three years allows for the unforeseen to be dealt with and the maximum number of donors to be solicited.

Usually two to three years is the ideal amount of time to conduct a campaign. A fourth year can be used as “wind down” period. Five years is the maximum amount of time an organization can sustain interest and passion for a campaign while maintaining their annual fundraising.

Important to understand is that pledges to the endowment can be paid over five or more years, even if the campaign is finished in less time. However, someone will need to be responsible for follow-up with donors until their pledges are completed.

### STEP 3: FORM A SOLICITATION TEAM

In thinking about the actual solicitation team, it’s valuable to review what we are asking for when we ask donors to consider an endowment gift so that the solicitors can be matched to the task.

An organization has three financial needs: most pressing and constant are its *annual* funding needs. Occasionally, a group needs new computers, a new building, renovation of an old building, a satellite office, and so on. For these it needs *capital* funds. Groups that want to be around for the next 50 or 100 years need an *endowment* fund.

Donors can help an organization with three kinds of gifts: gifts from their own annual *income*; gifts of *assets* such as stock, bonds, real estate, art and so on; and gifts of all or part of their *estate*.

Traditionally, endowments are funded by gifts from estates. This is why traditional endowments cannot be conducted as campaigns, because the receipt of the gift usually depends on the death of the donor as well as the time it takes to settle the estate (which can be years). Some groups have counted the unrealized value of bequests as part of their endowment campaign goal, but this is both foolish and unethical. A donor can change their bequest intentions any time before the donor's death, so even when a donor has promised a bequest, it may not happen if there is a change of heart or circumstance. Only irrevocable gifts such as trusts can be counted toward a goal. (For more on bequests go to [www.leavealegacy.org](http://www.leavealegacy.org). For information on other forms of planned giving, go to your local community foundation or to their website, or to the National Committee on Planned Giving at [www.ncpg.org](http://www.ncpg.org).)

In conducting an endowment campaign, organizations are asking donors for *assets*, given during the donor's lifetime. Although gifts made from a donor's annual income are certainly welcome, they will never be as large as assets or estate gifts because even the wealthiest donors reserve the bulk of their income for their own needs.

Conventional financial planning dictates that one should "never touch principal." Yet principal is what you are asking these prospects to share. In a sense, you are asking people to transfer some of their "endowment" to your endowment. This is a process that requires thought, commitment, and careful consideration.

In forming a committee, then, you are looking for people who are comfortable asking donors for assets; usually, these are people who have made an asset gift themselves. The people on the solicitation team should include members of the board and people who will make large gifts to the endowment campaign before it is publicly launched. While this is the ideal scenario for any campaign, for an endowment it is imperative that those who are asking know what it feels like to decide to give a gift that one cannot give very often. The role of volunteers in these campaigns cannot be overstated. Staff can ask, and do, but even then a staff person will need to have made a endowment gift in addition to their annual gift to be an authentic solicitor.

To form the solicitation team, first identify the people closest to the group who can make the largest gifts. Then, a team consisting of a board member and a staff member asks each of the potential solicitors for their own gift first, then invites them to be on the team (it is assumed that

each board member will help start off the campaign with a gift of their own). Some members of the solicitation team are usually identified during the discussion about whether to have an endowment. They are the ones who argue in favor of it and say that they will give to such a campaign.

All the solicitors must be people whom the donors trust to have gone through this process. Plus, there is something very convincing when a person can say, "My husband and I have accumulated a nest egg of \$100,000 over many years of saving. It is for our retirement and for emergencies. But the threat to reproductive rights/environment/our children/world peace is bigger than our need for a nest egg. We want to make sure that Important

Group is able to do their work and not have to struggle so with fundraising. So we are giving \$10,000 to the endowment as our investment in our community's future."

Even someone with no real assets can be a

good solicitor as long as they have given a significant gift. In one organization, a board member postponed buying a new car. He described his gift this way: "My old car can be coaxed into a couple more years of use, and in the meantime I am going to give the equivalent of a car payment on a new car for two years, which will make a gift of \$5,000. I don't have any real assets, but I can give by postponing getting an asset, and my gift will have far more permanence than a new car."

In another instance, a solicitor described her gift this way: "I put some money aside every month for my two-week vacation each year. This year, I vacationed at home. I saw friends, I planted a garden, I read books, I went to free events at my library, and I gave the money I had saved for a trip to the endowment. I had a great time; so although my gift was significant for me, it was not painful."

The solicitation team can be formed slowly. It can start with two or three endowment donors. As more donations are received, new donors can be asked to join the team.

## NEXT STEPS

Once you have set a goal, created a gift-range chart, and formed the beginning of a solicitation team, there is one final planning step: identifying a critical mass of prospects for your campaign.

The next article in this series will discuss how to find prospects and whether to do a feasibility study. **[GF]**

KIM KLEIN IS THE PUBLISHER OF THE GRASSROOTS FUNDRAISING JOURNAL.

**A general easy rule to follow in soliciting capital or endowment gifts is to ask for a gift that is ten times the donor's annual gift amount.**

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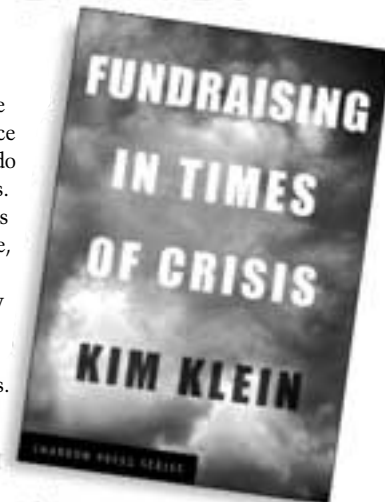
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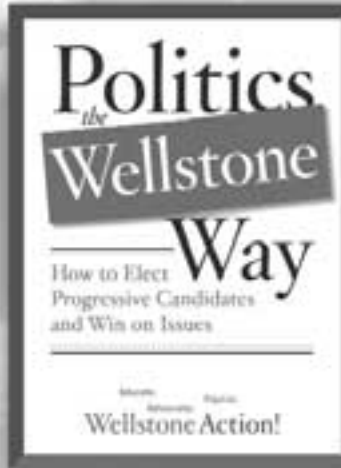
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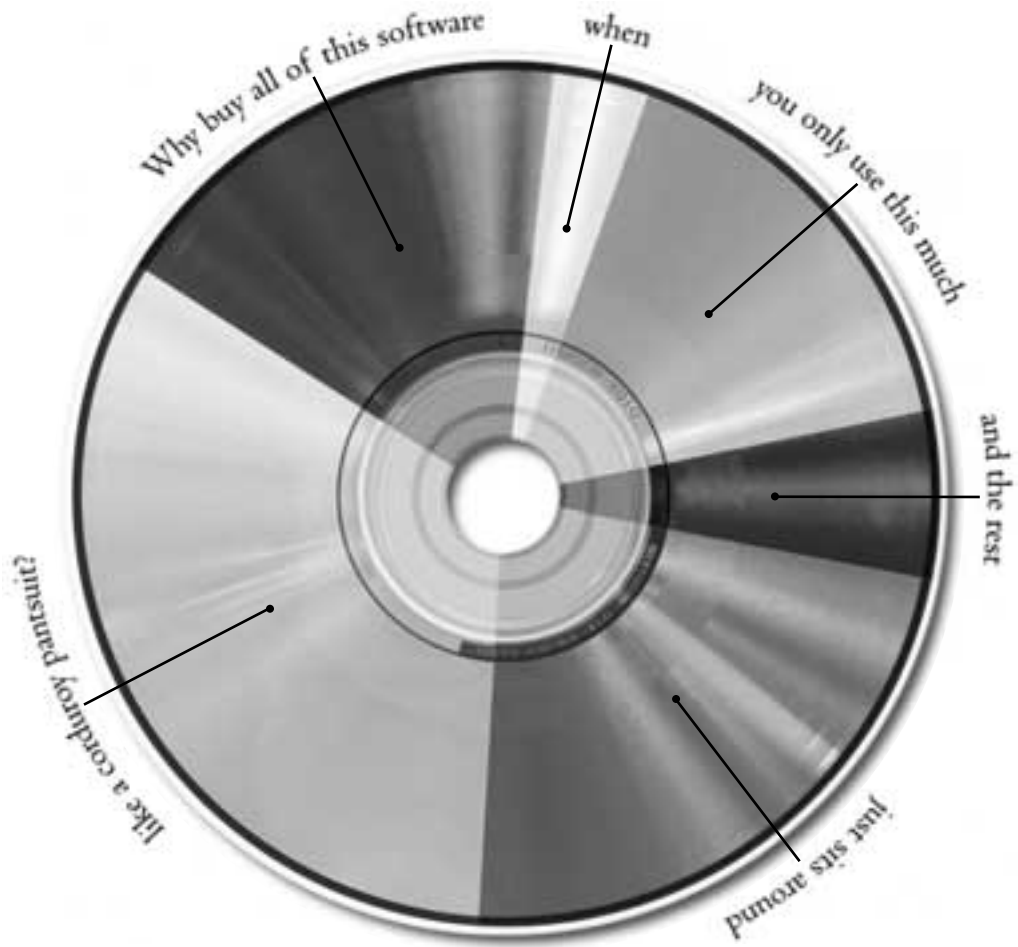
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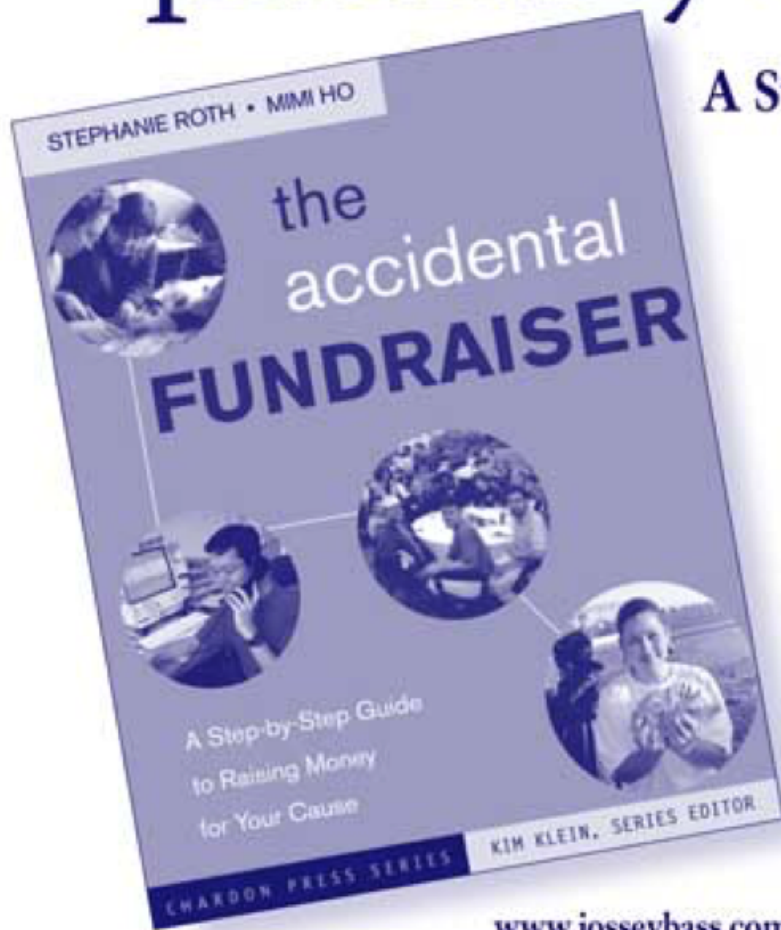
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