

Grassroots Fundraising Journal

VOLUME 25 • NUMBER 1
JANUARY/FEBRUARY 2006

25TH
ANNIVERSARY ISSUE

featuring:

A Life in Fundraising

BY KIM KLEIN

also in this issue:

Meet Our Board & Staff

When You've Outgrown
Homegrown Software

Why Good Fundraisers Are
Never Paid on Commission

A Step-by-Step Guide to
Organizing a Fundraising Dinner

The Fine Art of
Asking for the Gift

Evaluating Your Individual
Donor Program

Success Stories from
Around the World and
Around the Block

The Ten Most Important
Things You Can Know
About Fundraising





Anniversary Edition

VOLUME 25 / NUMBER 1 ■ JANUARY / FEBRUARY 2006

CONTENTS

Meet the *Grassroots Fundraising Journal's* Board & Staff 4

A Life in Fundraising 5

Kim Klein

Kim has spent 30 years in fundraising. Here's the story of her adventures and insights.

When You've Outgrown Homegrown Software 10

Gene and Marcy Weinbeck

Many groups devise ways of keeping track of their donors using Access or Excel. Here are eight ways to know when it's time to invest in an off-the-shelf fundraising software program.

A Step-by-Step Guide to Organizing a Fundraising Dinner 14

Mimi Ho

Plan carefully, pay attention to detail, and involve a group of enthusiastic volunteers and you can find success — building community and raising money — from this ever popular fundraising strategy.

Success Stories from Around the World and Around the Block 20

Compiled by Stephanie Roth

Inspiring stories from the U.S. and abroad of groups raising money from (and for) their communities.

GfJ READERS' PICKS: A Small Collection of Most-Requested Articles:

Why Good Fundraisers are Never Paid on Commission 23

Kim Klein

Five important reasons you should hire fundraising staff or consultants for a salary or fee, and not on commission.

The Fine Art of Asking for the Gift 25

Kim Klein

An all-time favorite. How to ask a prospect for money, and what you can expect from your efforts.

Evaluating Your Individual Donor Program 29

Stephanie Roth

How evaluation can help increase your fundraising success, and the questions to ask.

The Ten Most Important Things You Can Know About Fundraising 33

Kim Klein

Kim's lessons from 30 years in fundraising.



On Our Cover • KIM KLEIN, FOUNDER AND PUBLISHER OF THE *GRASSROOTS FUNDRAISING JOURNAL* FOR 25 YEARS, SHOWN WITH HER CAT, RUBY (AN EXCELLENT ASKER IN HER OWN RIGHT). PHOTO BY MONICA HERNANDEZ.

Grassroots Fundraising Journal

The *Grassroots Fundraising Journal* is published six times a year: January/February, March/April, May/June, July/August, September/October, November/December.

PUBLISHER

Kim Klein

EDITOR IN CHIEF

Stephanie Roth

ASSOCIATE PUBLISHER

Jennifer Emiko Boyden

SENIOR EDITOR

Nancy Adess

PRODUCTION MANAGER

Nan Jessup

BOARD OF DIRECTORS

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

GRAPHIC DESIGN & PRODUCTION

Cici Kinsman/C² Graphics

PHOTOGRAPHER

Mónica Hernández

WEBMASTER

Roni Terkel

SUBSCRIPTION INQUIRIES

Please call, email, mail, or visit our website (addresses below).

ADVERTISING INQUIRIES

Please call or email us for media kit.

WRITERS' GUIDELINES

Please call or email us for guidelines.

REPRINT POLICY

Please call or email for permission to photocopy articles from the *Journal*.

The *Grassroots Fundraising Journal* is a member of the Independent Press Association.

GRASSROOTS FUNDRAISING JOURNAL

3781 Broadway • Oakland, CA 94611

PHONE: (888) 458-8588 (TOLL-FREE)

(510) 596-8160 (SF BAY AREA)

FAX: (510) 596-8822

E-MAIL: info@grassrootsfundraising.org

www.grassrootsfundraising.org

Periodicals Postage Pending at Oakland CA 94615

Postmaster — send address changes to:

3781 Broadway, Oakland CA 94611

© 2006 Grassroots Fundraising
ISSN No. 0740-4832



LETTER FROM THE EDITOR

STEPHANIE ROTH

Welcome to the *Grassroots Fundraising Journal's* Special 25th Anniversary Issue!

This expanded issue inaugurates the *Journal's* 25th year. In it you'll find four new articles along with four others from past issues that were nominated by readers as their favorites. I think you will find these classics continue to be quite relevant.

This issue is also a celebration with readers, friends, and colleagues in the world of fundraising for social justice. We're touched by the many tribute ads congratulating the *Journal* on this milestone. You'll find them beginning on page 37. Special thanks go to you, readers and supporters, for keeping the *Journal* in print through your subscriptions, donations, and encouragement. We're delighted that the *Journal* has been useful to your work and we're gratified by your support.

One of the features of this issue is Kim Klein's reflections of her life in fundraising over the past 30 years. Kim is not only co-founder and publisher of the *Grassroots Fundraising Journal*, but as you will learn from her story, she has long been dedicated to helping grassroots groups raise the resources they need to work for a better world. Her belief in creating a broad base of donors as an integral part of lasting social change — not a sideline to the "real" work — has had an enormous impact on both the fundraising profession and social justice movements throughout the United States. Kim's story is more than a fascinating "trip down memory lane" — it's also an important lesson in how fundraising functions in the context of the political landscape.

Also in this issue, Gene and Marcy Weinbeck, longtime activists and developers of fundraising software, write about how to know when your customized Access or Excel program is no longer adequate to maintain the kind of data you need for successful fundraising. Next, we excerpt a chapter from our latest book, *The Accidental Fundraiser: A Step-by-Step Guide to Raising Money for Your Cause*, authored by Mimi Ho and yours truly, about one of the most popular fundraising activities, the fundraising dinner. Here you'll find the kind of detail that allows even novices to carry out a successful event. We wrap up the new offerings with some inspiring stories of organizations in the U.S. and around the world that have been both creative and successful in building individual donor support for their work.

Save the date: As part of our 25th Anniversary year, we are organizing *Raising Change: A Social Justice Fundraising Conference*, to be held Friday and Saturday, August 4th and 5th, 2006, in Berkeley, CA. You'll find more information on our website: www.grassrootsfundraising.org.

Last year was an extremely challenging one for fundraising. Part of the challenge of 2005 was that 2004, 2003, 2002, and 2001 were also difficult years in which to raise funds for social change. Natural disasters (augmented by human neglect and greed); bloody, costly and pointless wars around the world; and an ever-increasing gap between rich and poor all made our work both harder and more needed than ever. Let's aim for a change of course in 2006, so that the seeds we continue to sow toward a more just and peaceful world take hold and flourish.

Please meet Our Board...



Charlie Fernández
BOARD PRESIDENT
*Program Developer,
Contra Costa
Health Services*



Shelana deSilva
*Development
Associate,
California College
of Arts & Crafts*



Netsy Firestein
*Director,
Labor Project for
Working Families*



Miguel Gavalón
*Development
Director,
Equal Justice
Society*



Fred Goff
*President,
DataCenter*



Helen Kim
*Organizational
Development
Consultant*

Staff

Random interesting facts about our board & staff:

AGE RANGE:
26-62

ETHNIC BACKGROUNDS:
Black-American, Cuban,
Japanese-Caucasian, Jewish, Korean,
Mexican, Sri Lankan, White

STATE OR COUNTRY WHERE BORN:
California, Colombia, Colorado, Indiana,
Korea, Massachusetts, Michigan,
New York, Puerto Rico, Texas

NUMBER OF YEARS IN FUNDRAISING TOTAL:
120

NUMBER OF CHILDREN TOTAL:
5

NUMBER OF PETS:
25



TOP ROW: **Stephanie Roth** (Editor in Chief),
Tianna Paschel (Circulation Assistant),
Jennifer Emiko Boyden (Associate Publisher).

BOTTOM ROW: **Cici Kinsman** (Graphic Designer),
Nan Jessup (Production Manager)

PICTURED AT RIGHT: **Nancy Adess** (Senior Editor)



A Life IN Fundraising

Kim Klein



Almost everyone I know, in whatever profession, will be asked a few predictable questions. For example, a gardener friend says people always ask, “Is it fun to be outside all day?” and a high school principal friend says the main question is, “What are the biggest discipline problems you have?”

Here’s the question I am most often asked: “How did you get into this line of work?” Of course, what people really want to know is, “Why would someone purposely choose to have as a career asking

people for money?” But, taking the question at face value, it’s true that what most people don’t realize is that getting into fundraising is easy: few people want to do it, and everyone appreciates someone who will. Moreover, staying in fundraising is even easier: most people who volunteer to help with one event or one campaign soon learn that their reward will be more events and more campaigns.

I want to reflect not so much on how I got into fundraising, but why I stay in it and have stayed in it, one way or another, for thirty years.

I FALL, THEN JUMP INTO FUNDRAISING

In 1976, I entered the Pacific School of Religion intending to get a Master of Divinity and eventually to be

ordained in the Methodist Church. A number of things closed that door, but another door opened immediately, and that was fundraising. While at the divinity school, my work-study job was at the Center for Women and Religion, an underfunded voice for feminism in ministry that served all nine seminaries of the Graduate Theological Union. I learned my first fundraising lesson there, as I watched the three main staff become increasingly frazzled seeking foundation funding while trying to run programs.

At the same time, I began volunteering at a newly opened shelter for survivors of domestic violence (or, as we said then, “battered women”) called La Casa de Las Madres in San Francisco. Since I was a divinity student, I was asked to help raise money from churches and synagogues. I had no idea how to do that, so I wrote a pompous and pious essay called, “Towards A Feminist Theological Approach to Ending Battering.” (Everything was titled “Towards” in those days: “Towards a Theology of Sexuality,” or “Towards A Theology of Liberation.” We understood everything as a process that never ended, and we feared any definitive claim might serve to silence someone who had a different idea.)

My essay argued that violence against women was rooted in patriarchy, that all women are battered women in some ways, and that religion had allowed, caused, and tolerated violence against women for its entire existence.

This showed me that not only could a social change group raise significant money from a broad base of members, but that in fact it was more lucrative to go that route.

I further stated that woman-hating and sexist language in the church went hand in hand, and that, in the name of God (however one understood God because we don't want to be too firm), this violence had to stop. I said that La Casa was a place of healing ministry 24 hours a day and support for our work was an act of repentance and transformation. (See what I mean by pompous and pious?)

I circulated this essay to women's groups in houses of worship; amazingly, many of these groups then asked me to speak in person on the topic and gave La Casa \$50 or \$100 as an honorarium for my speech. Sometimes the church or the synagogue would make a bigger donation, and almost all of them gave a lot

of in-kind things — food and clothes for the women and children in the shelter, access to phones and typewriters, postage stamps, and so on. I soon realized that everyone knew women in violent relationships and that domestic violence was a not-well-kept secret everywhere I went. A domestic violence program didn't need a theological justification — it needed money to expand and ways to replicate itself in other towns and cities.

I moved on from LaCasa to help start another shelter in Oakland, which we called A Safe Place. Both of these organizations still exist, much bigger, much better funded.

All the fundraising we did in these two groups we made up as we went along. Even though a lot of very smart and creative women worked in these organizations, that strategy can only take you so far. So as I was deciding to leave seminary as a student I also decided to learn more about fundraising by apprenticing myself to someone who was good at it and who worked in a traditional and successful environment. I approached the Director of Development at Pacific School of Religion, Dick Schellhase, and basically told him that if he would take me everywhere he went, I would do anything he said. PSR was just beginning a \$13 million capital campaign, and I got to help with that campaign as well as assist with all the ins and outs of the annual fund. Dick was a great teacher, and he taught me the ropes of traditional fundraising. He also arranged for me to attend a five-day class of the very new Fund Raising School, founded by Hank Rosso and Joe Mixer. Hank became my mentor, and some years later I began teaching with him at the Fundraising School.

We never started a Laundromat. Instead we started the *Grassroots Fundraising Journal*.

MY FIRST DEVELOPMENT DIRECTOR JOB

In 1978, I got my first job as a development director with the Coalition for the Medical Rights of Women in San Francisco. The Coalition worked for reproductive rights, safe and effective birth control, and on a number of other women's health issues. It was, in fact, a coalition of a number of committees, each focused on one issue. In its first three years it had become well regarded. It had just received a three-year grant from the San Francisco Foundation to hire a development director, pay this person properly (my starting salary in 1978 was a generous \$10,000) and pay some program and fundraising costs. The challenge was to move the Coalition from almost total reliance on foundations to almost total reliance on membership for all its

operating costs and ongoing programs, and to do this over three years. (Foundation funding would be used for special programs or new initiatives, but we would never need it in order to survive.) The amount of the grant went down by half each year, and the idea was that grassroots fundraising would increase by at least 50 percent each year to make up the difference.

I didn't know when I was hired that this was a big gamble. It seemed to me a reasonable set of goals. It was much to many people's surprise, however, that we were able to become quite self-sufficient over three years and, more important, during that time we tripled our budget! This showed me that not only could a social change group raise significant money from a broad base of members, but that in fact it was more lucrative to go that route.

By 1980, people were starting to ask me how the Coalition had done it, and I began to give talks on how to build a broad base of members. In early 1981, toward the end of our self-sufficiency drive, I was invited to attend a

Training for Trainers program sponsored by a D.C. organization called the Youth Project and paid for by the Mott Foundation. At the first training, which lasted a week, twelve of

The limited information that existed about raising money was written for organizations that were much larger and more mainstream than the organizations we worked with.

us from all over the country gathered at a summer camp in the Wisconsin countryside. We were trained by some of the finest people in the business: Joan Flanagan, author of the first (and classic) book, *The Grassroots Fundraising Book*; Heather Booth and Karen Paget of the Midwest Academy; Si Kahn, an organizer and singer from North Carolina; Hulbert James, a long-time civil rights organizer; and Mary Harrington, who was the creator of this program.

Our summer camp would have been lovely had it been summer. But it was the middle of winter, freezing cold. We shivered, slipped and slid from our cabins to the training hall and back. But we learned about fundraising and about how to teach fundraising to adults. Ice-breakers, games, role-plays, case studies, dyads and triads — all these were new training tools and we learned how to use them all. We learned a huge amount from our trainers and from each other, about both training and organizing for change.

This group met again three times during the following two years; however, after this first intensive session we used a 4-H center outside of Washington, DC.

Part of the agreement for getting the training for free was being willing to conduct fundraising trainings, so I started being a trainer.

THE START OF THE GRASSROOTS FUNDRAISING JOURNAL

In the spring of 1981, with the self-sufficiency drive complete, I left the Coalition in the able hands of another fundraising coordinator and a great board and went out on my own as a consultant and fundraising trainer. I had met Lisa Honig some years earlier when she was the development director at Equal Rights Advocates, a public-interest law firm in San Francisco. We were interested in figuring out more ways for social change groups to make money — especially ways that in themselves would help fulfill the group's mission. We heard that the American Friends Service Committee had explored the idea of owning a Laundromat and we found that fascinating. We fantasized about starting a Laundromat that would be clean and pleasant, with flowers and comfortable chairs, coffee and tea, and a play area for children. It would make money and be a place to do organizing, especially around women's issues.

We never started a Laundromat. Instead we started the *Grassroots Fundraising Journal*. Not only didn't we have the money to start a Laundromat, we could see that creative fundraising was going to be a greater need as the country moved into the Reagan years and experienced the first round of profound government cutbacks in funding to social services. The limited information that existed about raising money was, with the exception of Joan Flanagan's book, written for organizations that were much larger and more mainstream — more along the lines of urban hospitals, universities and large arts organizations, such as symphonies and opera companies — than the organizations

we worked with. In particular, there was almost nothing for grassroots organizations that were challenging the status quo. If you were working on racial and economic justice, environmental advocacy, peace, human rights or civil liberties, you would have a hard time finding fundraising information that spoke directly to your needs. So, we decided to start a magazine whose sole job was to document the many ways social justice groups could raise money from individuals. Volume 1, Number 1 came out in February 1982.

Over the next ten years, I moved from one side of the country to the other. First, I moved from San Francisco to Inverness, a small agricultural community 50 miles

northwest of the Golden Gate Bridge. There, while publishing the *Journal* and working with some of the many local nonprofits, I learned how rural and small town fundraising differs from big city fundraising.

I MOVE AROUND, THE COUNTRY MOVES RIGHT

In 1986, I moved across the country to Knoxville, Tennessee, where I served as the Executive Director of the newly formed Appalachian Community Fund (ACF). ACF was a member of the social change network called the Funding Exchange, whose member funds worked primarily with wealthy, progressive donors to raise money and with community activists (which sometimes included these wealthy donors) to give away the money as grants to organizations working for social justice. ACF was working in the Appalachian counties of four states — Tennessee, Kentucky, Virginia, and West Virginia. There was (and still is) a vibrant social change community in all four of these states, and it was a great place to learn. Finding wealthy people there wasn't hard, but finding those who agreed with our politics was very difficult. We had some wonderful major donors and hundreds of smaller donors, and we started giving away money to great causes.

By the late 1980s, into Reagan's second term of office, progressives started having to defend policies and laws that we had previously seen as merely a starting point. For example, many of us believed that there should be universal coverage for health care. Universal health care coverage would obviously include reproductive health care, and abortion would be safe, legal and free. Simply having the right to get an abortion was not helpful enough to women who had no money, and abortion wouldn't have been the choice of some women if they had access to free birth

Some things in the fundraising world haven't changed at all, except perhaps to get worse: in that column I would put our continuing inability to talk about and deal honestly with money.

control or free prenatal care. Now we were defending the very idea that abortion, which had been legalized with the *Roe v. Wade* decision in 1973, should remain legal. The Equal Rights Amendment to the U.S. Constitution, which many feminists had criticized as the “Empty Rights Amendment” because all it said was, “Equality of rights under the law shall not be denied or abridged by the United States or by any state on account of sex,” was defeated after decades of lobbying in state legislatures. A friend of mine expressed our consternation: “Would it have killed them to write on a piece of paper that women are equal to men?” In Appalachia, we fought to maintain the progress that had been made during the 1960s Johnson-era War on Poverty.

I DREAM OF ENDOWMENTS

As fundraising got harder throughout the 1980s, it became clear that progressive foundations needed to ensure themselves of a steady income by creating endowments. Many had resisted the notion of having endowments — money that was invested in “the system” in order to create interest. We didn’t want to imitate mainstream foundations. However, the ability of the Funding Exchange’s foundations to guarantee a certain amount of funding every year to the communities we served was difficult when each year our fundraising started at zero. ACF, for example, could grow to a decent size raising money in the region and from people who had left the region, but its ability to make a significant difference would require a much greater infusion of cash — cash that would come from the interest off an endowment.

To see this happen, June Makela, then the director of the Funding Exchange network in New York, and I proposed that all 14 funds of the Funding Exchange work together to raise \$15 million over five years and then share the interest evenly. We argued that some regions, such as New England or San Francisco, would be able to raise money more easily than a region like Appalachia or the deeper south. Yet some of the money would come from fortunes directly or indirectly derived from mining or timber or cheap labor found in those very places. It was another way of redistributing wealth, which is (or should be) the ultimate goal of progressive funding.

After a year of discussion, all 14 of the funds agreed to the plan, which was modified to a fundraising goal of \$10 million over three years. I moved to New York City in 1989

to run this campaign — at that time the largest amount of money ever raised for something as left wing as the Funding Exchange.

It was not an easy task. The sheer size of the campaign — huge goal, 14 organizations, national scope — brought out the best and the worst in all of us. Nonetheless, we managed to hold the fundraising together for the three years of the campaign and reached our goal. Most of the money came in gifts of at least \$10,000; many were much higher. Most of the donors to the endowment were sophisticated and wanted this campaign to work, and most of the staff and boards of the local funds worked hard to see that it did.

The first President Bush had been elected during this time. He ran on a platform made famous by his comment at the Iowa primary: “Read my lips — no new taxes.” He continued the Reagan legacy and also involved the U. S. in the first Gulf War (over Iraq’s invasion of Kuwait).

During the 1980s and 90s, the nonprofit sector grew by leaps and bounds, as groups were formed to address the social needs that arose in large part because of government cutbacks and regressive legislation. Poverty and all its concomitant problems — homelessness, hunger, high unemployment, poor schools, racist backlashes against immigrants — as well as the advent of the AIDS epidemic caused the creation of thousands of social service agencies. The Gay and Lesbian Liberation Movement, the United Farmworkers, the anti-nuclear and environmental movements, and many other important social issues all expanded their work through the creation of nonprofits,

Other things haven’t changed at all, except perhaps to get better: the generosity of people, particularly ordinary people with little or no discretionary money.

which became the vehicle for the expression of the idealism of the 60s and 70s. The number of nonprofits went from 300,000 in 1983 to 750,000 a decade later.

As the endowment campaign wound down in 1992, I left the Funding Exchange, exhausted, but pleased with the success of the campaign. My partner, Stephanie Roth (a consultant in organizational development, board functioning, and fundraising for nonprofits), and I took a year off and traveled around the world. Of course, you can’t really take time off from fundraising, so we did training and consultation in about 16 of the countries we travelled in, and learned even more about how local groups figure out how to raise money from their communities, often under very difficult circumstances. We came back to the United States in 1993 and settled in Berkeley.

Stephanie and I decided we would now focus our attention on two things: the lack of racial diversity in the

fundraising world, and expanding the reach of the *Journal* and our books on fundraising and social change. Over two decades, the fundraising profession had gone from a world of, mostly, white men to one of, mostly, white women. Now it was time for another sea change. We helped to start an organization called the Grassroots Institute for Fundraising Training, whose mission is to change the color of philanthropy by placing people of color in social justice organizations and teaching them to be fundraisers. We expanded the *Journal*, and we published several more books through our partnership with Jossey Bass, the educational publishing company.

I continue to write, train, give keynote addresses at various conferences related to grassroots activism, consult, and raise money for the *Journal* and sometimes other causes that I volunteer for.

HOW THINGS LOOK NOW

Much has changed over thirty years — technology is the new frontier, with online fundraising and the World Wide Web introducing a whole new set of strategies to fundraising and opening up many new ways of relating to donors.

Some things in the fundraising world haven't changed at all, except perhaps to get worse: in that column I would put our continuing inability to talk about and deal honestly with money; the failure of the nonprofit sector as a whole and certainly of our leadership to demand a progressive taxation and the restoration and expansion of government services; the continually rising numbers of people living in poverty and the monumental gap between rich and poor, which breaks new records every month; and the ongoing struggle of the fundraising profession to diversify across race and age.

Other things haven't changed at all, except perhaps to get better: the generosity of people, particularly ordinary people with little or no discretionary money (it remains true that most money comes from families with incomes

of \$65,000 and under, and because 70 percent of Americans file a short form, most of these people receive no tax benefit for their giving); we have begun to examine the structure of nonprofit boards, and some organizations are trying out new models that might work better; and there is more and more published information on all kinds of fundraising so that people don't have to make it up as they go along.

Some things will never change: mainly, that the best way to get money is to ask someone for it in person, and that people feel good when they give away their money. People want to be engaged, they want to be useful, and they want to be appreciated; and they want the world to be better — fundraising is way to make all that happen.

As you can see, I got into fundraising first by chance and then purposefully; I stayed in it because it kept offering me adventures, particularly the ongoing greatest adventure of working for social change. At its core, progressive fundraising is about a radical redistribution of wealth. The ultimate goal is a society described in the Torah as one in which "The person who had little did not have too little, and the person who had much did not have too much," and "Everyone beneath their vine and fig tree lived in peace and unafraid." **GF**

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

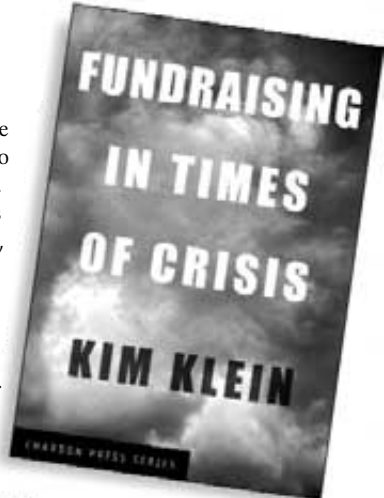
Subscribe to the
Grassroots Fundraising Journal
for the best hands-on, no-nonsense fundraising information available.



VISIT OUR WEB SITE AT www.grassrootsfundraising.org
OR CALL US TOLL-FREE AT **888-458-8588**

What really works.

Terry McAdam Book Award HONORABLE MENTION



Fundraising in Times of Crisis is a practical guide that offers valuable advice on what a nonprofit can do to survive difficult times. Drawing on over 25 years of fundraising experience, renowned consultant Kim Klein describes how to plan, implement, and evaluate strategies for getting through any crisis.

0-7879-6917-6 • Paper
\$24.95 US/\$35.99 CAN

For other resources for social change in the Chardon Press Series from Jossey-Bass, visit www.josseybass.com/go/chardonpress

JOSSEY-BASS
An Imprint of WILEY
Now you know.

WHEN YOU'VE *Outgrown* *Homegrown* SOFTWARE

BY GENE & MARCY WEINBECK

In this modern technological age, even the smallest nonprofits are likely to use some type of software to help with fundraising. These fall into two general categories: commercial “off the shelf” donor management software, and homegrown or custom programs. The homegrown varieties are most often constructed using Microsoft’s Access or Excel because they are the most readily available products from which to create a database.

With either of these programs, or similar products from other companies, people with some computer savvy can produce what appears to be a passable fundraising system. Sometimes the initial effort goes relatively smoothly and everyone is pleased for quite a while. Sometimes tension is generated as it takes longer to create a usable program that’s needed right away. Regardless, once the program is finally in place, there is usually such an accumulation of time, resources, and emotion invested in the result that the organization soldiers on with whatever they end up with.

In our many years working with small to medium-sized nonprofits in various capacities (our primary role now is as publishers of fundraising software), many organizations have come to us looking for a solution to having outgrown their homegrown programs. This experience has taught us a number of lessons that may be helpful if you are thinking it may be time to purchase fundraising management software. The stories and examples used to illustrate the lessons are composites of the many people and situations we’ve talked to and been involved with over the years.

WHEN IT'S TIME TO MOVE TO COMMERCIAL SOFTWARE: EIGHT LESSONS

1. When your record-keeping needs change, your software needs change too. When you add a pledge program, a membership program, or any other new fundraising method, your data-keeping methods need to keep pace. This is the time to start looking at alternatives — before you spend a lot of time and energy “reinventing the wheel.”

Here’s an example of what can happen. The staff of a shelter for victims of domestic violence wanted to move up from renting space to buying their own house. They instituted a capital campaign through a pledge drive and needed to send letters to remind donors when their next payment was due. Since the computer expert on staff didn’t know how to get the Access program they were using to calculate the current pledge balance and next due date, they created a special pledge-tracking template in Excel.

This led to two kinds of extra work for the person processing the checks. As she explained at the next staff meeting: “When a check comes in, first I have to look up the donor’s name in the Excel spreadsheet to see if it’s a pledge payment. If it is, I enter the check in the spreadsheet, then check to see that the spreadsheet correctly calculated the new due date and remaining balance. Next, I enter the check again into the Access program, just like all donations. That double work is annoying, but it’s not the real problem. The real problem is that the Access program automatically generates thank-you letters to all donors entered into the system; but the Excel program also generates a thank-you letter that also contains a reminder of the next pledge due date. So I have to make sure that only one thank-you letter goes out. The whole thing is awkward and frustrating and taking more time than it should.”

2. If you can raise more money fundraising than you can save by programming, then you should fundraise.

A group of passionate animal lovers in a small town got together, determined to give their area its first animal shelter. Everyone agreed on the goal, and they knew just the space to rent for the shelter, though they would have to act fast to pull together the funds to get it.

When it came to fundraising, most of these new board members were uncomfortable with anything other than holding an auction or bake sale. One member, Sam, volunteered to head up the fundraising effort, asserting, “I don’t mind a bit asking people for money.” When he started to talk about the people they could approach for donations and about holding house parties, everyone encouraged

him to put together a plan for the next meeting. Also, since Sam was already familiar with Access, he said he thought he could have a usable program ready to track the fundraising and print labels for mailings in no time at all.

At the next meeting, Sam reported with a pleased smile that the computer program was almost done. “What about the fundraising plan?” someone asked. Sam’s smile turned to embarrassment. Because the deadline for making the big initial payment was approaching, they had to do something fast. The computer program was set aside for the time being and the board stayed up into the wee hours laying out a fundraising plan.

By scrambling, they were able to raise more than enough to cover the deposit and the first month’s expenses. But over the next few critical months, more of Sam’s time was spent on his Access program than on fundraising. As a result, their fundraising momentum languished and their lofty goals were pared back to more “realistic” ones.

3. When you need answers to questions about your software, make sure you can find the person with the answer.

An important variation on the above story is when a nonprofit cleverly avoids the fundraising versus programming problem by either hiring a programmer or accepting the services of an enthusiastic volunteer to write a custom program for them. We’ll sidestep the issues of how much time and/or money that project will consume. More important is the unexpected problem of “unavailability.”

Getting a customized program is great — until you need some little changes and fixes the programmer didn’t think of. Reaching the volunteer who wrote the program — or putting out more money for the programmer — can become a real drag.

Even professional programmers have their limits. They enjoy — and make most of their money on — the original work of creating the program. After that, they are on to other projects, and the details of the old ones are soon forgotten. Calls from previous clients can cost a lot of extra time as the programmer needs to review the coding and remember what they had done. Because of the extra time required and because deadlines to current clients are generally more pressing, requested changes can languish while the organization waits.

Commercial “off-the-shelf” software, on the other hand, is maintained by companies whose ongoing success depends on keeping their software current and their customers satisfied.

4. When you’re starting out, you don’t always know what kind of data you might want to track in the future, and even if the information is there, it can be recorded in such a way that gaining access to it is a challenge.

Sometimes you just can’t look far enough ahead.

When a firefighter set up the Excel spreadsheet for his rural fire department, nobody in the organization knew much about fundraising. Now, however, they need to be able to extract new types of information from their program. Some of the information is there, but just needs to be recorded differently. For example, if a couple in their database has different last names (Sandra Jimenez and Mari Rosario), but makes their contributions together, they need four different fields just for their names: one each for Sandra, Jimenez, Mari, and Rosario.

Other information may be lost forever because it was never asked for. For example, it would be wonderful to know who on their list responded to or sponsored past events, which events were the most successful in attracting new members, and which were most successful in bringing in big donors. If they had this historical information, they would know which events to focus their efforts on now, and they would have a better idea about who to approach for help, advertising and sponsorships, and donations of time, money, and products.

Because a commercial program has these abilities built in, it can actually teach you about fundraising by introducing you to the tricks of the trade that can make your ongoing fundraising efforts more successful and fun.

5. When a new staff member inherits an old, in-house program that comes with neither a manual nor access to its creator, time is lost and frustration mounts.

Unlike most homegrown programs, commercial software has documentation, consistency of data and, most important, a technical support department that will help new staff learn the program, what the existing data mean, and how they can be used.

We have heard several stories much like this one about a woman we’ll call Alice. Recently hired by a nonprofit, Alice inherited an Access program that had been lovingly created and maintained by a previous staff member who had now moved out of the area. Alice was hired partly because she had above-average computer skills and the executive director had high hopes that she could pick up where the previous staff member had left off. But Alice was confronted with a totally unfamiliar custom program, no manual, and no one who really understood what all the codes and columns meant or what they were used for.

She quickly figured out the basics, like how to record donations and add new donors, but she was never certain that she was preparing her reports properly or that they were correct or complete. Worse, when the ED asked for something different from what was in the “standard” reports, Alice often had to shake her head and say (again), “I’m sorry, I just don’t know where to find that information.”

The group eventually cut their losses and bought commercial software, importing what they could into the new system from the old, leaving a wealth of unidentified information behind.

6. Ralph Waldo Emerson said, “A foolish consistency is the hobgoblin of little minds.” That may be true elsewhere in life, but not in data management, where consistency is never foolish — it is always essential.

A hospital auxiliary foundation’s development director learned an important lesson the hard way. It was the week of the Annual Banquet, where donors would be recognized for their generosity. On Monday morning, as Joseph was looking over some reports he’d asked the bookkeeper for on Friday, he realized that several were missing names he knew should be there and that the totals in others were just plain wrong.

The next morning, he received several phone calls from major donors asking why they had not received invitations to the Annual Banquet, when several of their friends had. You can imagine his reaction. On Thursday, the bookkeeper called to say that his totals for the just-completed big campaign (for which awards would be given at the banquet) didn’t match Joseph’s at all! Joseph was tearing his hair out. He called us for a consultation.

After a couple of quick questions, we were able to tell Joseph the problem: the data kept by the program wasn’t consistent. Since several people were doing data entry (part-time staff and several volunteers), each made up their own name for the event being recorded. This one was generally known as the Spring Drive. One person entered Spr’04, another used SprDr’04, and another just typed Spring. So, when Joseph or the bookkeeper ran reports for that campaign and the program asked for the specific name of the campaign, it excluded donations recorded with the other campaign names.

We showed Joseph how to run a report that identified all the various campaign names that had been used. He then went back through all the data and changed each of the “wrong” names to the one name he decided on. With that done, he re-ran his reports, coordinated with the bookkeeper, and asked the executive director and board members to personally call and invite the slighted donors to the banquet. Awards were reprinted using the now-correct totals, just minutes before the guests arrived.

With good commercial fundraising software, data consistency is enforced (with a dropdown list, for example). All staff and volunteers would have used the same campaign name, and Joseph would have had a much less eventful week leading up to the banquet (and kept his hair).

7. If several people use your fundraising software at the same time, make sure your program can accommodate them.

Growth often comes as a mixed blessing. We remember one nonprofit that had been doing donor management for years with an Access program. The group had grown to a point where several staff members all needed to use it at the same time (the computer jargon for a program run simultaneously by several users is “multi-user”). They needed it not just for donor management but also for volunteer tracking and contact history for the clients they served.

However, the program they were using was never set up to be run as multi-user. When two people were working in the program at the same time and one of the staff’s computers froze (about every couple of weeks), it caused the other person’s computer to freeze too, bringing all work to a grinding halt. Their computer dealer would come over and restore selected files from their backup tape and get their Access program up and running again. It took him two or three hours each time, and since he rarely charged them for his time, he was ready to be rid of the problem. His nonprofit client was ready, too, because it was costing them many hours of lost staff time. It was time for them to get a commercial program in a multi-user version that allows many people to be using the same program with the same data at the same time.

8. As fundraising efforts grow in complexity and numbers of people involved, software requirements grow, too.

Sometimes life brings us lessons in humility in amusing ways. Steve was the executive director of a once-small nonprofit. He had been working hard for several years as the only paid staff, so his many duties included those of development director. It was while wearing that particular hat that he had put together an Access fundraising program that has served him well.

He was able to slowly expand his organization to include, at first, a few part-timers and finally, excitedly, a full-time professional development director. Within a couple of weeks, however, his balloon was burst when his new employee, Anne, came in and politely and tactfully asked what the budget might be for a “real” fundraising program.

With a weak smile, Steve listened as Anne explained that Steve’s homegrown program was pretty good at doing the basics, but she needed it to do so in fewer steps (less time) or even do them automatically, so that she would have time to accomplish more.

Moreover, she needed features that Steve had never thought of including, such as generating reports showing how well each board member was doing at soliciting their assigned major donors and handing board members a donor profile sheet with all the details of the donor’s relationship to the organization, including past giving history, event attendance, and relationships to other donors.

When You Might Want to Consider Using Access or Excel for Donor Management

Excel is a popular spreadsheet program that comes with most versions of Microsoft Office. A spreadsheet provides a simple, but limited, way to set up basic record keeping. Its main drawback is that, as more data are added and more categories of data are needed, spreadsheets tend to become unwieldy and ultimately unusable.

Access is included with the Professional edition of MS Office and is actually a programming language and database manager that can be used to create a fundraising program. Think of it as SAR (“some assembly required”) furniture: a box containing a collection of parts, tools, and obscure instructions that you hope to assemble into a useful object.

With the proper template (and there is one for nonprofits included with Access), it’s not too difficult for someone with a modicum of computer savvy to put together a program to handle the basics of fundraising using Access. However, remember that the fundraising world is not static and neither should be your fundraising program — continuing maintenance could become a drain on your time and resources.

In our opinion, there are two situations in which using Access or Excel (or similar products) might make sense. *The first is if your organization is brand new, so new that the people involved aren’t sure just where it’s going or how long it will exist.* In that case, all that is really needed is a basic mailing list to keep contact information on everyone who shows an interest in the group or who contributes something (money, time, services) to the organization. Two bits of advice for people in this situation: first, record lots more information than you think you need; if you do expand, you’ll find it useful to know that one man is related to the mayor, or that a husband-and-wife pair have lots of experience in public speaking. Second, when you find the organization growing, don’t wait to get fundraising software — this is a case where “the sooner the better” is almost always right.

The second situation is one in which your organization has unusual or industry-specific needs, such as tracking school attendance and tuition payments, box-office theatre sales and ticketing, cabin rentals, or pet adoptions. If this is you, then you have three options:

1) Purchase two programs, one for fundraising, and the other for your special needs. This way you get software that is perfect for each activity. If you can’t find one that fits your special needs, then you might consider a custom or homegrown program for that one, but do your homework first, as this choice will inevitably be costly. Unless you are lucky enough to find two programs that talk to each other (share data back and forth, a rarity), you will find yourself doing some double-entry of data, most commonly when you update someone’s address, e-mail, or phone number.

2) Decide which activity, fundraising or the special need, is the most important to your mission. Then find commercial software that handles the critical aspect well and is also flexible enough to handle the basic requirements of the other need. It’s not a perfect solution, but you avoid all the double-entry of data.

3) Consider custom or homegrown software as a last option. It will always be the most expensive — and most likely to cause problems down the line. You may start out with something that works wonderfully, but it will need constant maintenance and probably be outgrown eventually. You’re very likely to end up spending huge amounts of money and time — you’ll be amazed at how much! At least look seriously on the Internet at what software is available. Chances are good that somebody has already written a program to do what you need and you can save your resources to put toward your mission.

— G.W.

CHANGE HAPPENS

All of these stories — and many more we could tell — pretty much come down to this: no matter where you start with data management, your needs will change as time goes by. It may be in small increments, as simple as now needing a place to record cell-phone numbers. Or it may be more dramatic, as when the one person whom an organization relies on for all things computer-related suddenly leaves and takes all the knowledge about their homegrown program with them. Whatever your particular story, it will be true for you, too, that having and using a donor management program is a constantly changing, growing part of your nonprofit’s life.

We hope that these stories will start you thinking about how things may have changed in your own organization. Very often the dividing line between doing okay with your homegrown program and needing the stability

or more sophisticated features offered by commercial software is the thin line between one moment and the next. As with so many things in life, we end up wishing we’d taken action sooner.

Let these stories be a wake-up call — start investigating fundraising software packages now. Look carefully at a number of professional software programs, comparing their various features, costs, and expandability. A good place to begin is on the *Grassroots Fundraising Journal’s* website: grassrootsfundraising.org. By preparing ahead, you’ll save yourself and your staff lots of time, energy, and frustration — all of which would be better spent on your fundraising and other productive activities. **GFJ**

GENE AND MARCY WEINBECK FOUNDED AND ARE STILL ACTIVE AT FUNDRAISER SOFTWARE (WWW.FUNDRAISERSOFTWARE.COM). THEY HAVE BEEN WORKING WITH AND FOR THE NONPROFIT INDUSTRY FOR MORE THAN 20 YEARS.

A STEP-BY-STEP GUIDE TO...

Organizing a Fundraising Dinner

BY MIMI HO

EDITOR'S NOTE: This article is adapted from the new book, *The Accidental Fundraiser: A Step-by-Step Guide to Raising Money for Your Cause*, by Stephanie Roth and Mimi Ho.

Fundraising dinners take advantage of the human desire to come together, have fun, feel part of a community, and support a good cause. A community dinner is usually held in a public venue, such as a community center, restaurant, or hotel. During the dinner, people mingle, are fed a meal, and learn about the cause or organization. There is usually a program that may honor someone and include an emcee, speakers, entertainment, and a fundraising pitch. There may be additional fundraising events within the dinner framework, such as a silent auction, ad book, or raffle — all of which can help raise extra funds.

This article focuses on a local, grassroots dinner rather than a high-priced special event that might require a professional event planner and extensive staff time. Here the emphasis is on how to keep overhead costs down and how volunteers can run such a dinner.

BEST USES OF A COMMUNITY DINNER

Raising large amounts of money is usually not a primary goal of most dinners; there are faster ways of raising money quickly. But dinners are a great fundraising activity if you are also trying to achieve any of the following goals:

- Raise the visibility of your project
- Build community, celebrate accomplishments, deepen relationships with people who are involved with your project (volunteers, donors, or supporters) and intensify their commitment
- Bring in new money from new people
- Provide a way for volunteers to learn new skills and get more comfortable with fundraising activities

THINGS TO CONSIDER

Dinners take a fair amount of work and attention to detail. Once you've learned about the details below, consider whether you have enough enthusiastic volunteers to help carry out such an event. It's good to form a

coordinating committee of three to five people and a wider pool of at least another five to ten volunteers. It can be helpful if one of the dinner coordinators has had experience organizing some kind of event, such as a wedding, a family reunion, a big birthday party, or something comparable that would have given them an appreciation for the details and deadlines this kind of undertaking involves. Keep in mind, too, that a successful dinner takes at least three months to organize (six months is ideal) and requires upfront money (see Costs, below).

You may be organizing a dinner as a one-time event, but as with many fundraising strategies, if you can repeat the event year after year, improving as you go, it will become easier to organize and more successful, with increased financial returns from the event each year.

Many organizations hold annual dinners. Those that do have found that it takes two or three years for the event to smooth out kinks, build a loyal base of attendees, and develop a "tradition" status. Once the dinner has been established as a successful affair, a segment of your supporters are likely to return year after year. Some will bring their friends, introducing new people to your project. If you follow the steps outlined here, you can both energize your supporters and make a modest amount of money.

COSTS

The following items represent potential expenses; the costs can be kept lower if you can get many of them donated:

- Venue for the event
- Tables and chairs
- Food and drink
- Paper goods or place settings
- Equipment (such as a sound system)
- Insurance (liability insurance is sometimes required by the venue)
- Fees and expenses for entertainers or guest speakers
- Child care

- Invitation design, printing, postage
- Publicity (ads, public service announcements, flyers)
- Copying of materials
- Postage for thank-you letters

TEN STEPS TO A SUCCESSFUL DINNER

These are the steps you should plan on taking. Each is discussed in detail below.

1. Make a plan
2. Recruit volunteers
3. Develop the invitation list
4. Find the dinner site and set the date
5. Design, print, and send invitations
6. Plan the program
7. Arrange food, drink, and other logistics
8. Publicize the event, do turnout calls, sell tickets
9. Review the event details and hold the event
10. Evaluate the event and send thank yous

Step 1: Make a Plan

Because a dinner is a larger event than most, the coordinating committee should help set the goals for the dinner, make a work plan and budget, and recruit and coordinate the other volunteers who will help carry out all the tasks.

The coordinating committee should be clear about the goals for the dinner and avoid getting swept up into fantasies of getting a famous entertainer to perform, serving gourmet food, having elaborate decorations, and so on. Setting realistic goals will help you avoid producing an event that loses money.

Since tickets alone may not raise the funds you need or tap into the giving potential of the people who attend, consider some of the following ideas for raising more money from your dinner:

- Sell raffle tickets before and during the dinner and hold the drawing at the dinner
- Hold a silent auction at the dinner
- Create an ad book to be distributed at the event
- Invite individuals or businesses to sponsor the dinner by underwriting some of the costs
- Ask people to sponsor entire tables at the dinner
- Make a pitch for an extra contribution at the dinner

You'll find articles in past issues of the *Grassroots Fundraising Journal* on raffles, ad books and auctions (listed at www.grassrootsfundraising.org); sponsorships are discussed in this article.

These extra fundraising activities also allow you to get support from people who may not attend the event but who want to contribute. To reach the fundraising potential

of these extra activities, you will need to sell raffle tickets and ad space far in advance of the actual dinner. These strategies are a perfect project for a subcommittee of volunteers to coordinate. Make sure there is good communication among the committees organizing these auxiliary fundraising strategies and the volunteers who are soliciting sponsorships and other in-kind items for the dinner so that the same vendors or people are not being asked twice for donations related to the same event.

Decide if you want a host committee or sponsors for the event. A host committee is usually made up of visible members of the community who lend their name to show that the dinner and your organization are widely supported. Recruit a host committee early on in the process so that the committee names can be printed on the invitation. Committee members are asked to make a financial contribution to the dinner and, even if they aren't able to attend, to send personalized invitations to their friends.

With dinner sponsorship, individuals, organizations, and businesses give a substantial donation or may even underwrite the dinner. In return, the sponsors' names are featured prominently on the invitations and programs and at the event itself through banners or displays. Think through which businesses might be appropriate sponsors. For example, if you are working on environmental issues, sponsorship by a company known as a polluter would likely alienate your supporters. On the other hand, a contractor known for using environmentally friendly materials in their business might be interested in supporting your group and getting some publicity for it.

Another way to get larger donations is through table sponsorships. Organizations or individuals who sponsor a table pay a lump sum — usually more than the actual cost of the total number of seats at the table — and then give tickets to people within their organization or to friends.

The key to a successful dinner is good planning. Creating a detailed work plan on the front end will help save much headache in the long run. Because the teamwork of volunteers is so important to successful dinners, your work plan should specify the point person and other volunteers for each task or series of related tasks. Include deadlines that give enough cushion to allow for delays or problems that may come up. Even then, expect some crisis, such as a speaker or performer who gets sick the day before the event, or a printing error that advertises the wrong date.

Plan to organize your volunteers into committees to carry out the range of tasks required: program — speakers, location, food, and so on; promotion — invitation and publicity; and additional fundraising activities — ways to increase the money raised by producing an ad book, raffle, or silent auction.

The coordinating committee should develop the overall work plan that sets goals and parameters, and should plan out as much detail as possible for the project committees. Generally, it is better to err on the side of more detail than less, to make sure everyone has the same vision.

For example, the program committee needs to know if the coordinating committee envisions that community members will provide entertainment and be the key speakers; that way, it won't go off and recruit the local, flashy politician who is a good speaker but does not represent your group's values.

Step 2: Recruit Volunteers

Dinners depend on the enthusiasm and commitment of volunteers. A dinner can be a good entry point for someone to learn how to do fundraising, find out more about the project, and become invested in its future. The skills developed in putting together a dinner can translate well to other work your project does, such as planning a speaking event, organizing a rally, or recruiting people to a public meeting to make demands of a decision maker.

Be realistic about how many volunteers it will take to do all the tasks of putting on a dinner. Err on the side of recruiting too many volunteers — some are bound to drop out because of illness, other time commitments, and the like. Train and support your volunteers, staying thoughtful about how they like to work. Include benchmarks in your work plan to measure how progress is going and to adjust plans if needed. Troubleshoot as problems arise.

Step 3: Develop the Invitation List

With your volunteers, brainstorm a list of friends, family, coworkers, neighbors, and acquaintances who might be interested in learning more about your project and enjoy coming to the event. You'll need to send at least three times as many invitations as you're hoping will attend — more than that if you're inviting people who aren't so close to you or the organization. You can also invite people who live in another state or who for some other reason cannot attend but may make a contribution anyway. Don't forget to invite everyone on your organization's mailing list: those who receive your newsletter, if you have one, or who have expressed interest in your work or made a donation of any size.

Step 4: Find a Dinner Site, Set the Date and Time

Consider a location that your supporters will find convenient and comfortable. If you work on women's issues, see if there are any women's centers or YWCAs with adequate space. If your project is based in the Latino or Asian community, try to find a space within that community. A multiracial organization will want to find a space where a variety of communities will feel comfortable.

Try to get the space for your dinner donated or rented to you at a low rate. If you can be flexible about the date of your event, there might be more opportunities for free or low-cost spaces.

Think about what types of facilities will be needed. Some considerations include the following:

- A kitchen to heat up donated food or where volunteers can cook the dinner
- A child-friendly room nearby in which to provide child care
- Space accessible to people with disabilities
- Extra tables and chairs beyond what the facility provides
- A sound system — if the facility doesn't have one you may need to borrow or rent one
- Liability insurance if required by the venue (see below)
- If you are considering serving alcohol, find out if the venue allows it and if you need a liquor license

If liability insurance is required, don't panic. If you are an established nonprofit organization with an office, you might already have a policy for liability insurance to which you can add a rider that covers the event. If you are an all-volunteer group that is not part of a nonprofit organization, you may be able to use the homeowner's insurance policy of one of the members of your group. If no one owns a home, find out if the venue itself can cover you under their liability insurance, even if it means an extra charge.

Step 5: Design, Print, and Send Invitations

The invitations can be as simple or as fancy as you like and can afford. If you have a volunteer with design skills, this is the time to let them shine! Just be sure to include the key logistical details in the invitation: what, where, when, directions to the dinner, phone number or e-mail address to reply. Include a reply card and envelope so that if people can't come to the event, they can still make a donation. If you have decided on a speaker, performer, or honoree, include that information on the invitation, along with the names of sponsors or host committee.

Have a place on the reply form to indicate whether child care is needed and for what ages of children; ask volunteers doing turnout calls (see below) also to ask about child care needs and the children's ages.

Before you print your invitation, have several people proofread it to make sure there are no errors, especially in the date, time, and place and the spelling of people's names.

Have a mailing party with volunteers to get the invitations out. Mailings are a great way for volunteers to get to know each other, learn more about the project, and get some concrete work done. If you have the capacity, it is

very helpful to ask volunteers to write a note on the invitations to add a personal touch.

It is increasingly common to send invitations by email, or to use an email service such as Evite.com instead of a paper invitation. Evite and other similar programs are web-based invitation services that allow a host to design their own invitation, enter their invitees' email addresses, and track replies online. You can also set it up so that reminder emails go out a couple of days before the event. (Note that commercial programs like "Evite" may not have privacy policies that prohibit them from selling the email addresses of people who receive your email invitation.)

Step 6: Plan the Program

The program is where you introduce your project's mission and accomplishments. You can include one or two speakers who are inspirational, represent your project, and can connect with your audience. Someone should work with them to prepare a concise, lively talk.

The program is also an opportunity to have performers who will resonate with your audience and convey the image and values of your project. Be sure they're a good fit for your cause and your audience. For example, at a volunteer appreciation and fundraising party for a group that was working to increase the vote in low-income communities of color, the dinner organizers, all people of color, were careful to choose entertainers who were also people of color. However, they failed to think about who might appeal to both older and younger guests, and they invited a well-respected and talented African-American folk group to sing. When the group performed classic songs from the 1960s, the young African Americans, Latinos, and Asian Americans in the audience listened for a while, then left the event early. Clearly, the performers were not right for this audience.

The emcee can make or break a dinner: choose one to match the tone you want to convey. If your event is to be solemn and inspirational, don't choose your friend the aspiring comedian. If you want your emcee to be snappy and move the program along, don't choose the wonderful but long-winded community activist who always tells stories of how things used to be.

Someone from your coordinating committee should prepare the emcee by being clear about the tone you want them to set, familiarizing them with the program and the flow of the room, and conveying any talking points they want them to use. Make sure your emcee has a written, detailed agenda, including any bios for performers and pronunciation keys for names. Place someone from the coordinating committee near the stage during the program in case the emcee has questions or unforeseen things come up, such as a performer who arrives late.

Step 7: Arrange Food, Drink, and Other Logistics

The Food

Good food — and enough of it — is very important to the success of the event. People who are happy and full are much more likely to give money and walk away with a positive feeling about the evening and your project than people who are still hungry at the end of the meal.

As with other items for the dinner, the more you can get donated, the better. Here's a way to approach seeking donations from restaurants (some grocery stores will also donate food and drinks):

- Make a list of restaurants that you and other volunteers frequent. It is much easier to get a food donation from a restaurant that recognizes you as a regular customer.
- Call and, if possible, visit the restaurants in person. Introduce yourself and your project, ask who you should speak to about making donations, and get a firm commitment for a donation or at least a clear notion about how to follow up.
- Leave a simple letter explaining your project, the purpose, date, and time of your event, and clearly asking for a food donation for the event.
- Tell them how you will recognize their donation at the event: by displaying the name of their restaurant, recognition in the program, and so on.

Volunteers can also donate food (cooked or just ingredients) and drinks to the event. Or the dinner can be a potluck — a good way for volunteers to participate and share. Another option is for a committee of cooks to have a food budget and cook the meal.

The Flow

It is useful to develop a plan at least a week or two before the event showing a minute-by-minute flow of the dinner. This helps everyone picture the event, identify things that haven't yet been taken care of, and clarify roles needed for the day. Each of your committees could draw up a detailed plan for each of their pieces; then create a master plan for the entire evening. Be as detailed as you possibly can. Here are some things to include:

- Who will unlock the dinner venue?
- How is the food arriving at the site? Is it being cooked on site? By whom and where?
- Will food need to be reheated or kept warm?
- How will registration happen? What lists need to be printed beforehand and with what kind of information? How will volunteers get the lists they need? How will people without tickets buy them?
- Who is doing child care and where?

- Who is working with the emcee? Who is the timer for the speakers? Who will be managing the performers or speakers?
- Who is doing the pitch? Who will be going around the room to collect donations?
- Where do you put the trash at the end of the night? Who will lock up and return the keys?

By thinking through these details far enough in advance, you can adjust the flow of the dinner plan as needed. You will also have enough time to recruit volunteers and prepare people who have roles during the event (speakers, emcee, and so on). The more you plan ahead and make these arrangements, the smoother your evening will go.

Step 8: Publicize the Event, Make Turnout Calls, and Encourage Early Donations

Publicize Your Event

Aside from the formal invitation, publicize the event more broadly by sending a public service announcement to your local newspaper and radio stations. Post flyers in the communities you work in and with organizations you know. Always keep in mind, however, that the personal contact of a phone call is the most effective way to get people to turn out to any event.

Make Turnout Calls

There is no use in having a fantastic program, the best raffle items, and delicious food if people don't actually come to the event. The most effective way to make sure people come is to make follow-up phone calls to those who received invitations.

The goal of turnout phone calls is to get people to commit to come to the dinner and to pay for and send in the money for their tickets ahead of time. People are much more likely to attend if they actually purchase their ticket beforehand. The calls will give you a sense of how many people will be coming so you can have the right amount of food.

Another important goal of the phone call is to ask people who will not be coming to the dinner to make a contribution — either by sponsoring other community members to attend or by a donation of support.

To ensure the absolute best turnout, make a final round of reminder calls to everyone who has made reservations for the dinner. Keep it short and simple, just reminding them of the details — the time, logistics, and any tips on things like where to park.

Step 9: Review the Event Details and Hold the Event

Materials

Make a checklist of all the materials you need for the event itself. Double- and triple-check the list before the event. Here are some of the items you may need:

- Guest lists (make several extra copies) with indications for who has replied, who has prepaid
- Cash and change for ticket purchases
- Pens for registration and writing checks
- Signs to direct people (to the restrooms, the coat room, child care, and so on)
- Tables and chairs
- Scissors, stapler, and tape (duct and Scotch)
- Flyers and other informational materials about the issue and project
- Markers: regular and permanent (in case you have to make signs for outside)
- Name tags
- Reply envelopes, contribution cards, and baskets for collecting donations after the pitch
- Eating utensils, plates, napkins
- Decorations
- Ladder to help hang things up

Human Traffic

Review the physical layout of the event space and how people will move around it. Where will people register? Plan to set up the registration table so that everyone arriving has to sign in and pay for their tickets if they have not already done so; make sure there is enough room for people who are waiting to register.

Where will people mingle before the dinner? Is this a sit-down or a buffet dinner? If a buffet dinner, what is the most efficient way for people to get the food? Will you call up one table at a time or will it work for people to get up as they please? Do you want to have volunteers serve the food? That way you can control portions, but the service is sometimes slower. If people serve themselves, it is much faster if you arrange the buffet table so that a line can go along both sides.

Timetable of the Evening

Plan out the timetable of exactly how the evening will go. Here's a sample:

- 6:00 PM** Guests begin arriving. They mingle, get drinks, and find a place to sit.
- 6:45 PM** Dinner is served.
- 7:15 PM** Program begins. Emcee welcomes everyone, introduces project very briefly and introduces performance.
- 7:20 PM** Performance.
- 7:40 PM** Emcee introduces two key project members, who describe the project and tell personal stories about why they are involved and why the issue is important to them.

- 7:50 PM** Emcee or other speaker introduces honoree, presents award. Honoree speaks about the issue and the importance of the project.
- 8:05 PM** A member thanks the honoree, reinforces the importance of the project, makes a fundraising pitch, and asks people to put checks in envelopes on their tables.
- 8:10 PM** Volunteers circulate with baskets to collect contributions.
- 8:20 PM** Emcee closes program, thanks everyone, tells people to stay for dessert.
- 8:20–9:00 PM** Dessert and coffee/tea are served; guests mingle.

It is important to keep the program moving; if you are running too late, people will start trickling out before the fundraising pitch, and the event may fizzle instead of ending with a bang. The emcee sets the pace by being brief. Let all the speakers and performers know in advance how much time they will have and that someone will be cueing them by holding up signs as the time to end approaches: “3 minutes,” “1 minute,” “30 seconds,” “Stop.” Nevertheless, plan ahead for the inevitable extra time people will take.

The Pitch

To boost the fundraising from the dinner, ask a persuasive volunteer or member of your project to make a pitch. The person should ask very clearly for a donation, then pause, make sure people have pens and envelopes, and give people enough time to write checks.

Step 10: Evaluate the Event and Send Thank Yous

Though it might be tempting to run off to the next project, evaluating your event is an important step so you can see if you met your goals. Here are some questions to ask:

- Did you increase the number of potential volunteers for your project?
- Did you increase your visibility with a targeted constituency or an influential decision maker?
- Are your key leaders who worked on this project excited to work together on other fundraising or nonfundraising projects?
- Are there things that you would change about the planning or logistics if you did this again?

If you did not meet your fundraising goals, it is just as important to analyze why that happened. The successes and mistakes you make are important lessons to pass on. Your team should also make a recommendation about whether this event should be repeated — if not, why not; if so, with what changes?

If you decide to do a dinner again, compiling and filing all your records now — invitation originals, work plans, donor records, evaluation records, and so on — will make it much easier for people to do an event like this another time and will probably help them bring in more money.

Whether you met your goals or not, your volunteers have worked hard to put on this dinner, so draw out all the successes and go celebrate.

Thank yous go a long way toward deepening people’s commitment to your project and making them want to continue being a supporter. Send thank-you notes within a week or two of the event to all the volunteers who worked on the dinner, everyone who made donations (of food or other materials or of money) and, if possible, to all those who attended. **GFJ**

MIMI HO IS THE PROGRAM DIRECTOR OF THE ASIAN PACIFIC ENVIRONMENTAL NETWORK (APEN). TO ORDER *THE ACCIDENTAL FUNDRAISER: A STEP-BY-STEP GUIDE TO RAISING MONEY FOR YOUR CAUSE*, GO TO WWW.JOSSEYBASS.COM/GO/CHARDONPRESS.

**Want to find, order, and print out that
Grassroots Fundraising Journal
article on a specific fundraising topic
in just minutes? Now you can!**

DOWNLOAD SINGLE ARTICLES FOR ONLY \$3 EACH FROM
www.grassrootsfundraising.org/magazine/archives.html



Here are just a few of the titles you'll find:

FUNDRAISING IN TIMES OF CRISIS • THE FINE ART OF ASKING FOR THE GIFT
RAISING MONEY ON THE INTERNET • CHOOSING THE RIGHT FUNDRAISING STRATEGY
MAKING SPECIAL EVENTS WORK FOR YOU • CREATING A BUDGET FOR FUNDRAISING
REVIEWS OF FUNDRAISING SOFTWARE • DIRECT MAIL: WILL THEY OPEN THE ENVELOPE?

SUCCESS STORIES from *Around the World & Around the Block*

COMPILED BY STEPHANIE ROTH

This year we debut a new feature, short descriptions of organizations that have succeeded in raising money in creative and thoughtful ways under somewhat difficult circumstances. People often ask us for real-life examples of successful grassroots strategies, especially from organizations working in low-income communities, or in rural communities, or in developing countries, or working to challenge the status quo, or all of the above. We hope you find these as inspiring as we did, and that you will let us know of other examples we can include as we go forward — including stories from your own organization!

THE KIANDA FOUNDATION, NAIROBI, KENYA

The Kianda Foundation was founded in 1961 to provide quality educational programs for women based on the philosophy that women are the key to social development. Prior to Kenya's independence from Britain in 1963, women had few opportunities for formal education. Since then, the Foundation has established a number of educational programs: a secretarial school, a college, and youth enrichment programs.

In 1992, the Foundation started a project called Kimlea to work with girls between 14 and 20 years old who had dropped out of school. Most of the students are children of tea and coffee pickers in Kiambu District, who derive their only income from payment per kilo of the crop they pick in the large coffee and tea estates. The maximum a worker can earn on any one day is one Kenyan dollar. Most children, especially girls, drop out of school to pick with their parents and so boost the family income.

Kimlea provides training for income-generating skills, not only to the young girls, but also to their mothers after work. There are also courses on adult literacy, nutrition, child care, AIDS awareness, and more. In addition, Kimlea runs two daycare centers in the tea plantations for the children of the workers and a mobile clinic that looks after the families of the tea plantation workers and people of the surrounding area.

The Kianda Foundation has raised money using a variety of grassroots strategies, including selling jewelry through relationships with individuals and organizations in Europe as well as producing local events such as tea parties, dinner dances and cooking classes (they also run a hotel and catering training program). Because these events take a lot of time and effort, they state that “when we are short of money we go to individuals with specific targets.” They also meet with overseas supporters to ask for scholarships for students as well as help with other program costs.

In 2004, they launched an endowment fund, with the goal to raise \$2.5 million (US). Their strategy is to identify couples to contribute \$5.50 (US) per month for a year. First they recruit a “couple coordinator” who is willing to find nine other couples to form a group of ten. Each group of ten couples will ultimately give a total of \$660 in one year. So far they have raised \$68,500 for their endowment.

BECAUSE THESE EVENTS TAKE A LOT OF TIME AND EFFORT, THEY STATE THAT “WHEN WE ARE SHORT OF MONEY WE GO TO INDIVIDUALS WITH SPECIFIC TARGETS.”

TRIBAL HEALTH INITIATIVE, SOUTHERN INDIA

Drs. Regi and Lalitha George became concerned about the fate of the indigenous tribes in their homeland in Southern India and founded the Tribal Health Initiative. Today it has a 25-bed hospital and outpatient facility serving Tamil-speaking people in a remote forest area in the Dharmapuri district of Tamil Nadu. In June 2001, Dr. Regi sent a request for support to 50 friends and acquaintances: “Help tribals cure themselves. We need support. Please visit us.” That September, he launched a website — www.tribalhealth.org — and posted all the gifts he had received and stated how the money was being spent. Subsequently, a journalist from the Indian Edition of *Readers Digest* heard about the work of Dr. Regi George,

visited him, and wrote an article about Tribal Health Initiative. Local media reproduced the article, and \$2,000 came in contributions from people who read about the organization.

In September, 2002, wanting to tell his donors as much as possible about his work, Dr. Regi George published a simple annual report aimed at the general public. He sent the report to his donors and friends, again asking people to visit him or give something for his work. This appeal raised \$4,500. Three years after the first letter, Tribal Health Initiative has a database of 800 donors who provide 20 percent of the organization's income. This support from Indian individuals has also meant that Tribal Health Initiative has found it easier to get more support from Indian funds and charitable organizations. This has resulted in less dependence on foreign donors.

SUPPORT FROM INDIAN INDIVIDUALS HAS ALSO MEANT THAT TRIBAL HEALTH INITIATIVE HAS FOUND IT EASIER TO GET MORE SUPPORT FROM INDIAN FUNDS AND CHARITABLE ORGANIZATIONS.

SEMILLAS WOMEN'S FOUNDATION, MEXICO

Semillas, Mexico's only women's fund, decided in 2000 that it wanted to break away from the dependence on foreign donors that had characterized their fundraising since the 1990s. To carry out its mission to empower and strengthen women in their human rights, the fund supports projects dealing with reproductive rights, and health and sexual rights, among others. Semillas decided to focus its fundraising on women in the business community and has invested in education and consciousness-raising aimed at maintaining these donors in the long term. They have avoided the fundraising methods familiar in Mexico, such as telemarketing and direct mail, and have chosen, among other things, the model of a women's network, which they call Red de Mujeres Invirtiendo en Mujeres (Women Investing in Women). Semillas organizes special events or "living room meetings" at which women meet one another, and representatives of Semillas show the personal and actual results of their work. One real innovation in this local fundraising is a catalogue in which the donors can specifically see the results of the work.

This year Semillas launched their first annual fundraising campaign with a goal of raising one million pesos (approximately US \$100,000) in 120 days. The campaign began November 9, 2005 and will end March 8, 2006, to celebrate International Women's Day.

Emillienne de Leon Aulina, the director of Semillas, decided to ask "for the personal dedication of the board members." She reports, "Obviously it was tense, they could have thrown me onto the street, but I am convinced that an organization like Semillas needs board members who invest time in the organization, open up networks of new donors and also give to our work themselves." It worked and Semillas has a deeply involved board.

Semillas now raises 50 percent of its grantmaking budget from Mexican donors, both individuals and corporations.

GEORGIA FERRETS, SCOTTSDALE, GA

Georgia FERRETS is a small organization a few miles outside of Atlanta. Their primary purpose is to take care of ferrets that are waiting to be adopted and to encourage people to adopt ferrets as pets.

Georgia FERRETS has had some good success selling high-quality cheesecake to create earned income. They purchase the cheesecakes from a company that specializes in making baked goods for sale by nonprofits in Georgia and Florida, and resell them at a slight profit. They have found this

strategy to be a simple, straightforward, low-risk and predictable income stream, able to weather the vagaries of the economy, the war, and competition with other organizations. Their main marketing strategy has been word of mouth — at churches, pet stores, veterinarian offices, and through coworkers, family, and friends.

The organization earns \$5.50 for each cake they sell. In the first year of this strategy, they earned \$7,200. They invested in two 27-cubic-foot freezers to store the cakes when they come in, but since the cakes are pre-ordered by customers, there is no waste and no loss of money. The profit is immediately available. Word-of-mouth is good advertising and promotes the business. Once a carrot cake was so well spoken of that it generated orders for 95 more!

AMERICAN RIVER CONSERVANCY, COLOMA, CA

The American River Conservancy (ARC) is a 16-year-old land trust nestled against the Sierra Nevada Mountains in California. Coloma and the surrounding area is a community in transition from logging and ranching to tourism and encroaching housing-development sprawl. The American River draws thousands of people who raft, hike, fish, pan for gold, and spend tourist dollars during the spring and summer.

Two fundraising strategies described here are among several ways ARC generates income from their community.

1. Selling donated recreation tours and outings

Tourism and recreation are businesses that have a vested interest in the Conservancy's mission to preserve and protect the river and watershed, so every spring ARC solicits spring rafting trip donations from about a dozen local rafting trip outfitters. ARC usually sells spaces in the trips at a bit below the going rate. It gives priority access to its members through its print and e-newsletters, then to everyone via its website and flyers. ARC takes the registrations and payment, then makes the reservations with the rafting companies.

ARC reserves at least one or two of the trips for major donors and prospects. Each raft has a land trust staff or board member aboard who acts as naturalist and ambassador. The invitations are personal, the event is free, and

THEY HAVE AVOIDED THE FUNDRAISING METHODS FAMILIAR IN MEXICO, SUCH AS TELEMARKETING AND DIRECT MAIL, AND HAVE CHOSEN, AMONG OTHER THINGS, THE MODEL OF A WOMEN'S NETWORK.

the donors have lunch on a beautiful beach that has been protected in perpetuity by the organization.

In addition to raising money, these trips help increase awareness of the importance of preserving riparian habitat and the success of ARC's land trust among local and visiting rafters and guides and provides an opportunity to cultivate new donors and recognize existing ones.

The program, managed by paid staff, costs less than \$1,000 a year. It brings in about \$5,000, for a net income of about \$4,000.

2. Offering guided hikes and other programs led by staff and volunteers

The Conservancy hosts at least six to eight programs each month year round, including at least one nature hike, two to three workshops (gourd making, basket making, working with raku clay firing, herbal remedies), one or two lectures (mercury contamination, birds of Belize, Native American history), and other miscellaneous programs. They publicize these programs through the event calendars of local and regional media, flyers (posted by volunteers), and through their newsletter and e-newsletter to members and supporters.

The financial goal is to raise about \$4,000. Other goals are to draw new audiences and supporters to the organization, increase memberships through personal solicitation

by trip leaders or staff, increase involvement and sense of community among members, and provide the public service of education to the rural community.

All programs are managed by paid staff but provided mostly by volunteer program leaders; the cost is about \$15,000, net income about \$11,000.

RAISING MONEY FOR GAY, LESBIAN, BISEXUAL, TRANSGENDER GROUPS

A very creative use of the pledge event has been used to raise money for pro-lesbian, gay, bisexual, transgender causes. It was inspired as a way to challenge Fred Phelps, the infamous anti-gay pastor of the Westboro Baptist Church in Topeka, Kansas, who organizes pickets around the country to assert that God hates gay people. Phelps's group uses provocative tactics, such as protesting at the funerals of gay people. He hit the national spotlight when his group protested the funeral of Matthew Sheperd, the twenty-one-year-old gay man tortured and killed in Wyoming in 1998.

An Ann Arbor Michigan businessman, Keith Orr, co-owner of the Aütbar, has been credited with coming up with a way to use Phelps's antics to raise money for gay causes. He urged people to make pledges based on the length of time the Westboro protestors stayed outside his business in 2001. "We had some pledge a dollar a minute, and others pledge only a nickel a minute, but it all added up," he said. In his first attempt, he made \$8,000 for a local

IN ADDITION TO RAISING MONEY, THESE TRIPS HELP INCREASE AWARENESS OF THE IMPORTANCE OF PRESERVING RIPARIAN HABITAT AND THE SUCCESS OF ARC'S LAND TRUST AMONG LOCAL AND VISITING RAFTERS AND GUIDES.

gay-rights organization. In Huntington, West Virginia, in a similar response to a Phelps local protest, groups or individuals pledged donations for each minute of Phelps' rally or for each time his protesters said selected words. Flat fee pledges were also accepted. The money collected went to the local human relations commission to support diversity education. **GF**

STEPHANIE ROTH IS EDITOR OF THE *GRASSROOTS FUNDRAISING JOURNAL*.

WHY *Good Fundraisers* ARE *Never Paid* ON *Commission*

BY KIM KLEIN

An organization that worked with abused children desperately needed a new facility. However, they could barely meet their annual operating costs, so taking on higher rent or purchasing a building seemed impossible. Nevertheless, because their program was seriously suffering from lack of adequate space, they shopped around. Whether they rented or bought, they would have to remodel any building for safety and accessibility and to make it pleasant for the children.

The group found a building that the owner was eager to sell, and she offered them a good deal. They saw that, with a little work, this could be the ideal space. The obstacle was the cost: They would need \$500,000 to cover everything. This amount seemed completely unattainable and then, as if in answer to a prayer, a handsome stranger showed up and offered to raise the \$500,000 for a 20 percent commission. If he didn't succeed, he explained, they would not be out anything; however, they would pay him 20 percent of any money he did raise. He proposed to raise \$700,000, which would cover his costs and the costs of the campaign as well as the \$500,000 needed for the building. He could finish the campaign in a year, he said, in which case he would earn \$140,000.

The group knew that paying on commission is highly frowned on in fundraising. So much so that all the trade associations of fundraisers, including the Association of Fundraising Professionals, the National Association of Hospital Developers, and the Council for the Advancement and Support of Education (CASE), have issued statements decrying the practice of commission-based fundraising.

Why is fundraising on commission an absolute no-no? There are several reasons. First, no one else in nonprofit organizations is paid on commission. In this particular group, the counselors are not paid more for every child that shows improvement nor are the social workers paid for each child whose abuse they report. Everyone is paid a salary in recognition that their work is a process and that they may be very good counselors or social workers and still not show a lot of progress with every child.

Second, a commission tends to distort salaries. In this case, this fundraiser would be making \$140,000 a year, quite a bit more than the executive director, who earned \$55,000.

Third, this person would not bring his own list of contacts to ask for money. He would be working with the organization's donors. He told the group he has some contacts from previous jobs, but would they want him to use them? And would they want him taking their donor

information to his next job? Further, his whole livelihood depends on donors saying yes to his requests. Even a totally honest

fundraiser working under these conditions would be tempted to distort information, seeing his rent check in the eyes of each prospect. Also, many big gifts take cultivation and several visits. He may be willing to settle for a small gift in order to get it quickly rather than take the time a larger gift would require in proper cultivation.

Fourth, what would the donors think if and when they found out that 20 percent of their gift, designated for a new building, went to this temporary staff person? Donors know that it costs money to raise money, but few things make donors angrier than seeing that too large a

*No one else in nonprofit organizations
is paid on commission.*

part of their designated gift was used for expenses, and 20 percent going to one person's salary fits that description.

Fifth, and most important, one person should not be in charge of actually raising money for an entire campaign. Suppose this fundraiser was both honest and successful. When he left, the group would be \$500,000 richer, to be sure, but no wiser with regard to fundraising. The role of a fundraiser is to get the board and

other volunteers to help raise the money. A good development person coordinates, researches, plans, and helps decide which volunteer should go with which other staff or board member to ask for the money, when each prospect should be solicited (should Sally Jones be asked right away, or not until her close friend Mabel Smith has given?), and other strategy issues.

Finally, the person coordinating the fundraising should absolutely believe in the cause and be a part of the team of people putting the campaign together.

For all these reasons, paying on commission is not an option for fundraising.

Some people in small organizations will say, "But we don't have the cash to hire someone outright and it's risky to hire a person when you can't afford it, both for the person and for us if they don't raise the money." However,

for all the reasons listed above, a small organization especially cannot afford the risk involved in hiring someone on commission.

Here are some other ways the children's group could

raise the money they needed. They could go to the eager property owner and see if she would accept a lower down payment, then they could explore how to finance the building instead of trying to pay

for it all at once. A committee composed of a couple of members of the board, a couple of volunteers, and the executive director would need to make a list of ten people who could give the money for the down payment and the costs of moving and fixing the space up. Then they would

need to go and ask these prospects for the money.

These slow, thoughtful, and group-generated steps will provide the needed money, build support from the constituency, and, by the way, save the organiza-

tion the commission fees of the handsome stranger.

No matter how strapped for cash you are, you should never consider doing something unethical to raise the money you need, and commission fundraising is unethical. **GFJ**

Even a totally honest fundraiser working under these conditions would be tempted to distort information, seeing his rent check in the eyes of each prospect.

A good development person coordinates, researches, plans, and helps decide which volunteers should go with which other staff or board member to ask for the money.

KIM KLEIN IS PUBLISHER OF THE GRASSROOTS FUNDRAISING JOURNAL.

Two popular COLLECTIONS from the GRASSROOTS FUNDRAISING JOURNAL!

GETTING MAJOR GIFTS

Raise More Money — Donors who give major gifts each year are the backbone of a fundraising program. Learn how to ask for major gifts and upgrades, respond to put-offs, conduct major gift campaigns, and more in these 12 instructive articles.



\$12 each

THE BOARD OF DIRECTORS

Develop a Fundraising Board — An effective Board of Directors takes major responsibility for fundraising activities, setting a leadership role. Learn how to develop a committed, productive Board that raises money and stays on track in these 10 how-to articles.



TO ORDER, VISIT OUR WEBSITE AT: www.grassrootsfundraising.org OR CALL OUR TOLL-FREE NUMBER: 888-458-8588

THE *Fine Art* OF Asking FOR THE *Gift*

BY KIM KLEIN

People who are active in an organization, particularly board members and key volunteers, are natural candidates to solicit major gifts in person from contributors or prospects. An organization may even provide training sessions to increase volunteers' skill and comfort in making such personal solicitations.

Many people have discovered that doing face-to-face fundraising reminds them of the true depth of their commitment to an organization. They remember why they became involved with the work in the first place and why they think the work is important. Occasionally, people discover in the process of asking for gifts that their commitment is not that strong and that they would be happier in another organization.

People soliciting major gifts for an organization must, first and foremost, believe thoroughly in the cause of the organization. Second, they must have demonstrated that commitment with a financial contribution. The size of that contribution is not important, but it must be an amount that is significant for that individual. Having made their own gift, they convey the message to their prospects (whether simply in attitude or in words as well), "Join me. Do what I have done. Give a large contribution to this organization because it is really important." Once a solicitor has demonstrated their own commitment, they can approach their prospects with confidence.

Many *people* have discovered that doing face-to-face *fundraising* reminds them of the true depth of their *commitment* to an *organization*.

TYPES OF PROSPECTS

There are three types of prospects for face-to-face solicitations:

- People who have given before and are prospects for a repeat or upgraded gift
- People who have not given before, but are close to someone in the organization

- People who are interested in the cause but don't know anyone in the organization.

For people in the last category, some kind of cultivation is necessary before actually soliciting the gift. Inviting the person to a special event, house meeting, or educational evening, or asking to see the person in order to describe the program, should precede the meeting at which a gift is requested. In this article, we will assume that the prospect is ready to be asked for the gift.

APPROACHING THE PROSPECT

There are three steps in approaching the prospect:

1. A letter describing the program and requesting a meeting to discuss it further
2. A phone call to set up a meeting
3. The meeting itself, in which the gift is usually solicited

Obviously, if you are approaching your spouse or your best friend, you can skip the letter and perhaps even the phone call. In some cases the letter will be enough and there will be no need for a phone call and meeting; in others a phone call alone will suffice. Requests for gifts of more than \$1,000, for capital gifts, or for multiyear pledges will almost always be more successful in a face-to-face meeting.

Further, even when prospects decline to meet, they are pleased that you were willing to take the time to meet with them had they so desired.

Letters to Current Givers

The simplest letter is the one to prospects who have given before. You thank them for their support in the past

and ask them to give the same amount or more again. In the letter, describe some of your achievements during the past year and some of your future plans. Tell them you will phone them in a few days and, if they are in your area, offer to meet with them. Enclose a stamped return envelope.

After a few days, phone them. Often you will discover that the check is in the mail. Over time, you will learn who prefers not to be phoned, but just wishes to be reminded when it is time to renew their gift.

If you do meet with the prospect, ask for a larger gift than they gave last year, or use the meeting as an opportunity to ask for the names of other people who might be interested in giving major gifts. As you get to know the donors, you can see if they would make good board members or if they would be willing to solicit some large gifts on behalf of your organization. Meeting with current donors tells people that they are valued and helps build their loyalty to the organization.

Letters to People Close to the Organization

Letters to prospects in this category should be signed by the person who knows them best. Letters to prospects you know rest heavily on the amount of respect and affection the prospect has for you. When writing to someone you know, use the same tone and format you would use in writing to him or her about anything else. If you normally call the person by their first name, do that in your letter. Mention to your friend that you are a donor yourself. You don't have to say how much you give — just the fact that you give will tell your friend that you are asking them to do only what you are already doing.

If the person who knows the prospect is unable or unwilling to write the letter, then the person actually soliciting the gift may be a stranger to the prospect. In that case, begin the letter by making the connection clear: "Jane Friendswithyou gave me your name. She said you might be interested in our work because...." Go on to describe the work of the organization and ask to meet with the person. Indicate in the letter that you will be asking for money. The letter can describe how much the organization needs and what kind of gift you hope the prospect will make.

In writing the letter, remember that people have short

attention spans. Make your sentences interesting, evocative, and short. Avoid using jargon or complicated explanations. Statistics are fine, if used sparingly. The idea of the letter is to spark the prospect's interest so that he or she

will want to meet with you. The letter does not have to convince fully, and in fact, should just raise the person's interest. The face-to-face meeting is the time to convince the prospect to give.

The *idea* of the *letter* is to spark the *prospect's interest* so that he or she will *want to meet with you*.

Sample Letter

Dear Theodora,

You and I have talked about my work with the East Side Senior Advocates, and I have appreciated your support over the years for our various projects. We are now entering one of our most exciting ventures yet — a project to put a Senior Advocate in every neighborhood where more than 10 percent of the population is over 65. This project will involve hiring three more staff people and renting one more office. The benefits far outweigh the costs, however.

I am hoping you will consider making a major gift to this project. We are looking for gifts in the range of \$2,000, although gifts of all sizes are needed.

I don't expect you to decide based on this letter — what I want is for us to meet and talk about the project. I will call you in a few days to see when we can get together.

Sincerely,
Anastasia

Prospects appreciate *persistence*, *assertiveness*, and an attitude that what you have to *offer* is critically *important* and worth taking some *time to discuss*.

The Phone Call

If you say you are going to call, call. Rehearse the phone call beforehand to anticipate possible questions or objections the prospect might have. The following examples show three different problems that arise during phone calls and ways they could be handled.

Scenario One: The Easy Prospect

You: Hello, this is Worthy Cause. Is this Mary Prospect?

Ms. Prospect: Yes, it is.

You: I recently wrote to you about.... Did you get my letter?

Ms. Prospect: Yes, I think I did.

You: Do you have a minute now? (Or, Is this a good time to talk?)

Ms. Prospect: I have just about one minute. Now, remind me of what your organization does. I get so many letters.

You: Our organization...(two sentences at most). What I

would really like to do is get together with you for about half an hour to explain our project in more depth. I know you are busy. Is there any time next week that I could come see you?

Ms. Prospect: I think I could fit you in next Wednesday at 10:00 AM.

You: Great. I'll be there. Thanks so much.

Scenario Two: Time and Logistics Problems

Ms. Prospect: This is really a bad time of year for me. I'm doing an inventory and then I have to fly to Washington, D.C., and I just can't fit in another thing.

You: I can certainly understand that. Why don't I call you next month and see if things have settled down, and you might have some time then?

Ms. Prospect: That would be fine.

Or,

Ms. Prospect: This is just too busy a time for me. I'll call you when I can work you into my schedule.

You: I know you have a lot on your mind. I'll call you in a month or so to see if things have settled down.

Or,

Ms. Prospect: I never make decisions to give away such large gifts without talking it over with my husband. We do all our giving jointly.

You: That seems reasonable. May I come and talk to you both?

Scenario Three: Disagreements with the Organization

Ms. Prospect: I got your letter, but I have to tell you honestly that I think the government should be taking care of this, and you all should be lobbying for restored government funding in this area.

You: We agree that the government should be taking care of this problem, and we're working with a coalition of groups to pressure for restored funding. But in the meantime, these people are without services, and we have to turn to people like you who understand the need so clearly. I'd like to talk with you about our government strategy, since I know that it is an area of interest to you, in addition to discussing our program. Could we meet next week?

Or,

Ms. Prospect: Aren't you the group that had to fire your executive director for incompetence a little while ago?

You: Yes, our executive director was released when the board discovered....I know you'll be pleased to learn that Much Better Person has taken her place and things are now completely back to normal. I really want to talk about our programs in more detail. Is it possible to set up a meeting in the next few weeks?

Or,

Ms. Prospect: I have other priorities at this time and I'm not sure your organization falls within my present commitments.

You: I know that you have other priorities. I would really appreciate it if we could discuss our organization's program because I think it fits within your

concerns. Jane Friendswithyou indicated that you are strongly committed to... and we do work in that area now.

Ms. Prospect: I'm afraid you'll be wasting your time.

You: I'm not worried about that. I don't want to waste your time, but I do think a brief meeting would help us both to see if we have any goals in common.

It is also a *good feeling* to *know* that you were *able* to set aside your own discomfort for the *greater purpose* of meeting the *needs* of your *organization*.

THE IMPORTANCE OF BEING ASSERTIVE

Most of the time when people put us off we assume that they are trying to say no but are just too polite to come right out with it. This is a false assumption. Prospects are looking for signs that you are really serious about your organization. They appreciate persistence, assertiveness, and an attitude that what you have to offer is critically important and worth taking some time to discuss.

If you are easily put off and take the first no as the final answer, it tells the prospect that you are not terribly concerned about the organization, or that you don't really care whether or not the prospect gives. Clearly, you don't want to be rude, but you need to be willing to push the prospect a little; don't take the first resistance as the final word.

THE FACE-TO-FACE MEETING

Once you have an appointment, you are ready to prepare for the face-to-face solicitation. This is not as frightening as it seems. First of all, the prospect knows from your letter or your phone call that you will be talking with them about making a contribution. Since they have agreed to see you, the answer to your request is not an outright no. The prospect is considering saying yes. Your job is to move them from "I'm considering giving" to "I'd be delighted to give." The purpose of the meeting is to get a

commitment to give. Everything else revolves around this purpose. It is fine for the conversation to go off on a tangent, but you must keep bringing it back to the financial needs of the organization and the possible role of the prospect in meeting those needs.

As the solicitor, you must appear poised, enthusiastic, and confident. If you are well prepared for the interview, this will not be too difficult. Many times, board members and volunteers are afraid they will not appear knowledgeable about the organization. It is perfectly fine for them to bring along a staff member or someone who has been with the organization for a long time and who can answer difficult questions. Sometimes going with a partner also helps you feel more relaxed. It is also fine to answer a question with, "I don't know, but I'll be glad to get you that information."

In the meeting, your role is to help the prospect to see that giving to your organization is a logical and natural extension of his or her interests and concerns. Ask the prospect questions, and carry on a conversation with him or her. "Do you agree with our approach?" "Did you see the article about us in last week's paper?" "Has Jane Friendswithyou talked much about our organization?"

When you finally ask for the gift, look the prospect right in the eye and in a clear, bold voice say, "Can you help us with a \$300 contribution?" or, "We are hoping you can give \$500 to \$1,000." Keep looking at the prospect, and don't say anything after you have asked for the gift. It is the prospect's turn to speak.

Although it may seem like a long time between your request and his or her response, it is only a matter of a few seconds. Sometimes the prospect will say, "I'd like to help, but that figure is way out of my range." Your response can be, "What would you feel comfortable giving?"

After you ask for the gift and get an affirmative answer, discuss how the prospect wants to make the gift. Perhaps they will give you a check right there, or mail it in the return envelope you brought. For larger gifts, prospects (now donors) may want to transfer stock, or make other arrangements that will cause the gift to arrive in a week or two.

Once these arrangements are made, thank the donor and leave. Immediately after the interview, send the donor a thank-you note. Another thank you from the organization should be sent when the money arrives.

BUILDING A STRONGER ORGANIZATION

Although it can be anxiety producing to ask for money the first few times you do it, it is thrilling to get an affirmative commitment from a major donor. It is also a good feeling to know that you were able to set aside your

own discomfort for the greater purpose of meeting the needs of your organization. Knowing that you can talk comfortably about the financial goals of your organization is empowering. Boards of directors find that they are immeasurably strengthened when each of their members feels able to ask for money. **GFJ**

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

Want more useful fundraising information? Order back issues of the **Grassroots Fundraising Journal**

You'll Find helpful articles on: Specific fundraising strategies that will help you raise more money • How to encourage your board of directors to become fundraisers • How to ask for money from individual donors, and keep them giving ... and much more

Vol. 24 #4

- The Value of a Nest Egg: Starting an Endowment
- Prepare and Manage a Special Events Campaign Budget
- Early Focus on Membership Brings Stability: The Southwest Workers Union Story



Vol. 23 #5

- Designing Effective Surveys
- The Fundraising Letter
- Organizing & Fundraising: Sisters in the Struggle

Vol. 24 #2

- Being Well Connected: Why Local Politicians Matter to Nonprofits
- How We Survived an Embezzlement
- Monthly Donors: A Success Story
- Book Review: Benefit Auctions



Vol. 22 #4

- Fundraising in Times of Crisis
- Fundraising Tuesday
- After the Lights Go Out: Turning Your Special Event into Future Gold

For a complete list of available back issues visit us online at
www.grassrootsfundraising.org

Evaluating Your Individual Donor Program

BY STEPHANIE ROTH

The following three stories illustrate the importance of evaluation as a tool in developing a healthy fundraising program for your organization.

Group X

Group X has been raising money from individual donors for several years. At the end of every year they send a fundraising appeal to their mailing list of approximately 2,000 names. For the past three years, they have received 250 to 300 donations from that mailing. They don't know if the same people give each year; they also don't know if the rest of the people on their list (as many as 1,700 each year) are even interested in continuing to hear from them. They maintain their list in a database program that is not a specialized fundraising database, and they don't have an easy way to document the giving history of their donors.

Because they'd like to expand their donor program and increase the amount they raise from current donors, they realize that they need better systems of tracking their contributions and a way to analyze patterns of giving over time.

Group Y

Group Y has spent the past five years systematically building an individual donor base. They ask their donors for money three or four times a year, including a year-end mail appeal, two special appeals, and an invitation to their annual dinner. They make an effort once a year to meet with each major donor (defined as someone giving at least \$1,000 a year).

When Group Y recently faced a budget crisis brought on by cuts in their foundation funding, they decided to increase their efforts to expand their major donor program.

For the first time, they completed an analysis of the trends in numbers and sizes of gifts they were receiving. They discovered that, while they received gifts ranging from \$15 to \$10,000, the numbers of donors at each giving level (\$15–\$99, \$100–\$249, \$250–\$499, and so on), was a surprise. They had lots of people giving less than \$100,

several people giving \$1,000 or more, but only a handful of donors giving between \$100 and \$1,000.

By evaluating their donor giving patterns in this way, they were able to identify the middle range of donors (those giving \$100–\$1,000) as the group most neglected in their fundraising activities and thus the group with the most potential for expansion.

Group Z

At Group Z, Daniel, the new development director, was frustrated by the lack of board involvement in the organization's major donor program. Half of the board members refused to do any face-to-face asks and most of the major donor solicitations were carried out by the executive director, with only a few made by board and other staff members. Bringing his concerns to the executive director, Daniel learned that the board had actually improved significantly over the past several years. Five years earlier, the only major gifts the group received came by chance in response to their annual mail appeal. No one ever met with any donors and the board did not participate in fundraising at all — nor were they expected to.

Now, after many fits and starts, cajoling, training and encouraging the board, half of the board is actively participating in the annual major donor campaign, and a few more board members join in every year.

THE VALUE OF EVALUATION

These three examples illustrate how evaluation can help you know whether or not your fundraising program is doing what you want and need it to do. Evaluation tells you how close you came to accomplishing your goals and gives you guidelines for developing next year's fundraising plan.

Group X had neither fundraising goals nor a way to find out how well their donor program was working. Group Y learned where their greatest opportunity for growth lay. (In fact, many groups find a gap in their individual giving program in the \$500 to \$1,500 range, as this is often the most neglected group of donors. This is partly

because donors giving more than \$1,500 are given a lot of personal attention for their significant donations; donors giving less than \$500 probably don't expect a lot of personal attention, and continue giving if you merely communicate with them every so often about how the work is going and ask them to give on a regular basis. With just a little more effort and more personalized approaches to the under-\$500 donors, more of them would probably increase their giving over time and move into the \$500–\$1,500 category.) At Group Z, by discovering how far the board had come over the past several years, the development director was able to appreciate the progress they had made and rethink how to work more effectively with them.

Thorough evaluation of your fundraising activities will help you answer the following broad questions about your fundraising program:

- *What is the best way to use limited resources of money and time to increase the money we're raising from one year to the next?*
- *How can we maximize the involvement of the broadest range of people (staff, board, and volunteers) in fundraising activities and integrate fundraising with the rest of our organization's work?*
- *How can we build a diverse funding base to ensure the health and sustainability of our organization?*

It is most helpful to evaluate both the "hard," or quantitative, outcomes that you can count — such as the response rate from a direct mail appeal, how much money you raised (after expenses) from a special event, how many donors renewed their support, and how many increased their gifts — and the "soft," or qualitative, outcomes. Qualitative measures include how many and in what way board members were involved in fundraising for the organization, what kinds of relationships you've been able to build with donors, and how fundraising is perceived in the organization (for example, as a thankless task or an important part of how an organization's mission is fulfilled).

DEFINING SUCCESS

In order to know if your fundraising activities are successful, you need to know what your goals were to begin with. Using strictly financial criteria, if you raised \$100,000 last year but your goal was to raise twice that, then you weren't particularly successful. But if your goal was to raise \$80,000, then clearly you had success by the measure of the amount of money raised.

There are other goals you want to set in both "hard" and "soft" terms and then evaluate. These include the following:

- Increase in number of donors
- Renewal by existing donors (ideally, you want 65 percent of your total donor base to renew their support from one year to the next)

- Increase in number of major gifts
- Participation of broad cross section of board, staff and volunteers in fundraising
- Greater visibility for your organization and its work in your community
- Tracking of donor information that allows you to analyze who's giving at what levels over time and eventually to have a donor base represented by the numbers on the Donor Pyramid: 10 percent of your donors give 60 percent of the income you raise from individuals; 20 percent of your donors give the next 20 percent of that income; and 70 percent of your donors give 20 percent of that income (see illustration).

WHAT TO EVALUATE

The answers to the following detailed questions will provide the foundation of your evaluation. From these, you will be able to determine if you've met the broader goals described in this article.

Questions about donors and money raised

1. New Donors: How many new donors did your organization acquire in the past year? How many had you planned to acquire? What specific strategies did you use to get those new donors?

2. Current Donors: Of the donors who gave in the previous year, what percent renewed their gift? What did you do to keep your current donors? How many solicitations did most donors receive in the course of the year?

3. Upgrading Donors: What did you do to move donors into higher dollar amounts so that they made a commitment that was at a significant giving level for them? How many donors were solicited for a major gift?

4. Amount Raised: What is the total amount you raised from individual donors this year?

5. Levels of Giving: How many donors do you now have at the following levels of giving?

Less than \$50

\$50–\$99

\$100–\$249

\$250–\$499

\$500–\$999

\$1,000–\$2,500

More than \$2,500

6. Contact: In what ways did you keep in touch with your donors over the past year? (This could include sending them newsletters or updates, inviting them to be part of a fundraising team, inviting them to participate in the organization's work in other ways, and so on.)

Questions about board, staff, and volunteer roles in fundraising

7. **Board:** How many board members were involved in at least one fundraising activity? What specific activities did they participate in? What opportunities did you provide to increase the fundraising skills of board members?

8. **Volunteers:** How did you recruit and use volunteers? What did you do to support and encourage their involvement in fundraising?

9. **Staff:** What did you do to get staff members to integrate fundraising into their program or administrative work? What opportunities did you provide to increase the fundraising skills of staff members? How did you assure the best use of the fundraising staff's time?

10. **Giving:** Did all board, staff, and leaders make a gift to your organization that is significant to them? What did you do to encourage giving from all the constituencies of your organization?

Questions about systems and infrastructure

11. **What kind of database do you use for fundraising?** Is it easy to record and retrieve information? Are you able to produce reports that give you the information you need about your donors and the results of all your fundraising activities? Is adequate staff time allocated to keeping your database up to date? (See related article in this issue.)

12. **If you have a website, does it include a way to make donations online?**

Successes and Challenges

13. **What did you do to celebrate your fundraising successes and tackle your continuing challenges?**

Outcomes of specific strategies

14. **For each fundraising strategy completed during the past year, answer the following questions** (see sample chart).

- How many people did you ask (or invite)?
- What was the response (number of gifts and percent of people asked)?
- How much money did you raise (gross and net)?
- How many new donors did you acquire?
- Who in the organization was involved in this activity (staff, board, volunteers)?
- What worked and what didn't?

15. **Once the chart is filled in, ask yourselves one last question regarding each of these strategies: In what other ways did your organization benefit from this activity?** For example, did it gain publicity for your organization, provide education on fundraising for members, provide an opportunity to get to know and involve donors more?

SAMPLE EVALUATION CHART

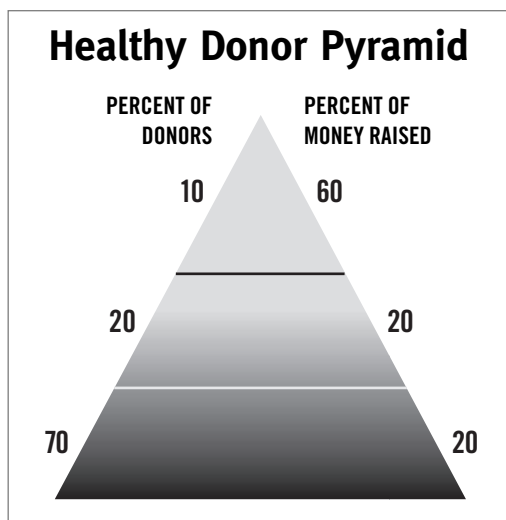
The chart shows an evaluation of the fundraising activities of one organization. They currently raise about 25 percent of their annual budget from individuals; the rest comes from foundations. Their goal is to increase the proportion raised from individuals to 50 percent over the next five years. A chart like this is easy to do and will give staff and board a bird's-eye view of the kind of information you need to generate in order to evaluate your fundraising program.

You will need to add more detail in order to fully assess the effectiveness of a particular strategy or fundraising effort. For example, in the section on "Direct Mail to New

Prospects," you would evaluate the results of each list you mailed to, as well as any changes you made in the package (envelope, letter, reply device, inserts) since your last mailing. On the major donor campaign, you would want to incorporate feedback from members of the solicitation committee and from the donors you met with, and identify ways to get more people involved or give solicitors more support to be able to complete their asks.

WHEN TO EVALUATE

Take time after each activity is completed to evaluate it. In the case of an activity that involved a team of people, such as a major donor campaign or a special event, bring the team together to celebrate the success of the activity, discuss the results, and identify areas to improve upon for the next year. Keep written records of all your evaluations. Once a year, when you are making your fundraising plans for the coming year, review all the evaluations done during the year and add any other information that was not covered there. These written reports will also be useful for tracking your fundraising progress over several years and in orienting future staff and volunteers.



USING THE RESULTS OF YOUR EVALUATION TO PLAN

The results of your evaluation should inform the plan for your next set of fundraising activities. If you have done a thorough job of evaluating your past year's activities, when you are putting together a fundraising plan for

the next year you will have a much clearer idea of how much money you can realistically raise, how much it will cost you, and how many donors will respond to a given strategy and at what levels of giving. **GFI**

STEPHANIE ROTH IS EDITOR OF THE *GRASSROOTS FUNDRAISING JOURNAL*.

Evaluation Chart

STRATEGY	NUMBER OF PROSPECTS ASKED	RESPONSE: PERCENT AND NUMBER	AMOUNT RAISED (GROSS AND NET)	WHO PARTICIPATED AND HOW MANY (STAFF, VOLUNTEERS, BOARD)	WHAT WORKED AND WHAT DIDN'T (DID WE ACCOMPLISH OUR GOALS?)
Direct Mail to New Prospects (Acquisition)	Two mailings; total of 5,000 letters sent	1.2%, 60 new donors	Gross: \$2,100 (average gift: \$35) Expenses: \$3,000 Net: -\$900	Development Associate, with assistance from Development Director	Rate of response was slightly better than we expected. Planned this strategy as an investment to bring in new donors, so didn't expect to have a net profit at this point.
Mail Appeals to Current Donors (under \$250)	500 donors each asked twice during year	55% on renewal letter; 15% on special appeal	Gross: \$18,000 Expenses: \$750 Net: \$17,250	2 staff & 5 board members helped with mailing	First time that board members added personal notes to some of the letters. Hope they will get more comfortable doing phone calls and donor visits in the next campaign.
Phone Solicitations to Current Donors & Qualified New Prospects (to ask for gifts between \$100 and \$250)	100 donors who give between \$100 and \$250 were called as a follow-up to personalized letters	Reached 30, left messages with 50 others; a total of 40 sent in a contribution	Gross: \$7,200 Expenses: None beyond phoning costs and staff time	Ran it as a phone bank over several evenings; 3 staff, 2 board members & 2 volunteers participated	Because it's hard to reach people by phone, we always do this over several nights. The first year we only reached 15% of our donors; by adding several nights, we've gradually increased the total number reached. Received more gifts at higher amounts than with just a letter.
Personal Asks for Major Gifts (\$250 & Up)	65 (40 were current donors, some at less than \$250; 25 were new prospects)	30 gave \$250 or more; 8 gave less than \$250	Gross: \$25,000 Expenses: \$500 (some meals, local travel & long distance calls) Net: \$24,500	ED and DD did most of the asks, 2 board members participated and one of them brought in a \$5,000 gift.	Still working on getting more board members and other volunteers to work on major donor campaign. Too many of the donors have a relationship only with the ED.
Annual Dinner	750 invitations sent to current and recently lapsed donors, 100 to new prospects	200 people attended event, 40 sent in \$ but didn't attend	Gross: \$22,700 Expenses: \$10,200 Net: \$12,500 (Includes ad book income of \$2,500)	Dinner committee of 5 volunteers, 2 board members & 1 staff person	Hoped to get 250 people to the dinner and gross \$30,000. Two problems: bad weather that night affected turnout, and we didn't get as many high-dollar sponsorships as hoped.
House Parties 1) Judith 2) Panya & Suzy 3) Miguel	Number of Invitations Sent: 1) 38 2) 85 3) 60	Number attended: 1) 15 2) 32 3) 28	Net Income: 1) \$1,100 2) \$750 3) \$2,500	Who was host? 1) Board Member 2) Former Staff 3) Longtime donor	Had planned to have 5 house parties during the year, pulled off 3; successful in getting a donor to do one. Financial goal was \$1,500 per party. Panya and Suzy's party had largest turnout, but pitch was weak and contributions lower than expected. Need better prep with hosts in the future.

10

Most Important Things You Can Know About Fundraising

BY KIM KLEIN

Many times at the end of a training or a speech about fundraising techniques and principles, I am asked, "What are the most important things to remember?" Usually the person asking is either a volunteer with little time to help with fundraising, a person new to fundraising and overwhelmed by the number of details she or he has to keep in mind, or a staff person who is not responsible for fundraising but wants to help.

Over the years, I have thought about what I consider the ten most important things to know about fundraising. The items are not presented in order of importance, although #1 is probably the most important; nor are they in order of difficulty. If there is any order, it is the order in which I understood these things and integrated them into my own fundraising work. Undoubtedly, other skilled fundraisers would have slightly different lists, but this list has served me well for many years. I hope you find it useful.

1. IF YOU WANT MONEY, YOU HAVE TO ASK FOR IT

While there are some people (may their kind increase) who will simply send an organization money or offer money without being asked, there are not enough of them to build a donor base around. Most people will not think to give you money unless you make your needs known. This is not because they are cheap or self-centered; it is because most people have no idea how much it costs to run a nonprofit or how nonprofits get money. If you don't ask them, they will simply assume you are

getting the money somewhere. They have no reason to think your group needs money unless you tell them, the same way they have no reason to know if you are hungry or unhappy or needing advice. When people are asked why they made a donation to any group, the vast majority will say, "Because someone asked me," and when people are asked why they didn't give, the vast majority will say, "No one asked me."

2. THANK BEFORE YOU BANK

Once you receive money, you must thank the person who gave it to you. I have found that disciplining myself not to deposit checks until I have written the thank-you notes has forced me to make thank-you notes a priority. I am not rigid about this rule because if I get behind in my thank-you notes and then don't deposit the checks for a while, the donors may wonder whether we really needed the money.

Thank-you notes do not need to be fancy and should not be long. If at all possible, they should include a personal note, even if it is from someone who doesn't know the donor. You can add something as simple as, "Hope to meet you sometime," or "Check out our website," or "Happy holidays," or even, "Thanks again — your gift really helps."

Many organizations have created note cards for staff and volunteers to use when writing thank yous. The front of the card has the logo of the group, on the top half of the inside is a relevant meaningful quote from a famous person, and the bottom half of the inside is used for the

*When people are asked why they
made a donation to any group,
the vast majority will say,
"Because someone asked me."*

thank-you message. It is a small space, so you really can't say much.

Many databases will print out a thank-you note after you enter the information about the donor — saving valuable time. These are best if accompanied by a personal note at the bottom.

Late thank yous are better than no thank you at all, but photocopied form thank yous are almost the same as no thank you.

The long and the short of thank yous is: if you don't have time to thank donors, you don't have time to have donors.

3. DONORS ARE NOT ATMS

A survey of donors who gave away more than \$5,000 a year asked, "What is your relationship with your favorite group?" Several gave similar answers, even though they did not know each other and did not give to the same group. All the answers were on this theme: "I would love to be considered a friend, but I am more of an ATM machine. They come to me when they need money, they tell me how much, I give it to them, and the next time I hear from them is when they need more money."

This is a terrible indictment of much of what passes as fundraising. When I have described this common situation in trainings, people have often asked, "How can we make sure our donors don't feel this way?" The answer is very simple, "Make sure you don't feel that way about your donors."

All groups have a few "high maintenance" donors, and may be forgiven for wishing them to go on a long trip to a place without phones or e-mail. But the majority of donors require practically no attention. They have the resilience of cacti — the slightest care makes them bloom. Thank-you notes, easy-to-understand newsletters, and occasional respectful requests for extra gifts will keep people giving year in and year out.

Think of your donors as ambassadors for your group. Design your materials so that donors will be proud to give your newsletter to a friend or recommend your group when their service club or professional association is looking for an interesting speaker, or to forward your e-mails to several of their colleagues. By treating your donors as whole people who have a number of gifts to offer your group, including their financial support, you will have more financial support from existing donors, more fun fundraising, more donors, and the peace of mind of knowing that you are not treating anyone as an object.

4. MOST MONEY COMES FROM PEOPLE, AND MOST OF THOSE PEOPLE ARE NOT RICH

There are three sources of funding for all the nonprofits in the United States: earned income (such as products and fees for service), which accounts for about 50 percent of all income; government (public sector), which accounts for 30 percent of all income; and the private sector, which includes foundations, corporations, and individuals and accounts for the remaining 20 percent. For the nearly 60 years that records about who gives money away have been

Think of your donors as ambassadors for your group.

kept, about 80 percent of private-sector funding has been given by individuals. In 2004, total giving by the private sector was almost \$248 billion, and 85 percent of that was given away by individuals!

These people are all people — there is no significant difference in giving patterns by age, race, or gender. Income is not nearly the variable that one would think: middle-class, working-class, and poor people are generous givers and account for a high percentage of the money given away. In fact, a study in the late 1990s by Arthur Blocks of the Maxwell School of Citizenship and Public Affairs at Syracuse University showed that 19 percent of families living on welfare give away an average of \$72 a year!

Too often, people think they can't raise money because they don't know any wealthy philanthropists. It is a great comfort to find that the people we know, whoever they are, are adequate to the task. Seven out of ten adults give away money. Focus your work on these givers, and help teach young people to become givers, too.

There is no significant difference in giving patterns by age, race, or gender.

5. PEOPLE HAVE THE RIGHT TO SAY NO

One of the biggest mistakes I made early on as a fundraising trainer was not balancing my emphasis on the need to ask for money with the reality that people are going to say no. No one is obligated to support your group — no matter what you have done for them, how wealthy they are, how much they give to other groups, how close a friend they are of the director, or any other circumstance that makes it seem they would be a likely giver.

While it is possible to guilt-trip, trick, or manipulate someone into giving once, that will not work as a repeat strategy. People avoid people who make them feel bad, and they are attracted to people who make them feel good. When you can make someone feel all right about saying no, you keep the door open to a future yes, or to that person referring someone else to your group.

People say no for all kinds of reasons: they don't have extra money right now; they just gave to another group; they don't give at the door, over the phone, by mail; a serious crisis in their family is consuming all their emotional energy; they are in a bad mood. Rarely does their refusal have anything to do with you or your group. Sometimes people say no because they have other priorities, or they don't understand what your group does. Sometimes we hear no when the person is just saying, "I need more time to decide," or "I need more information," or "I have misunderstood something you said." So, first be clear that the person is saying no, and not something else like, "Not now," or "I don't like special events." Once you are certain that the person has said no, accept it. Go on to your next prospect. If appropriate, write the person a letter and thank them for the attention they gave to your request. Then let it go. If you don't hear no several times a week, you are not asking enough people.

6. TO BE GOOD AT FUNDRAISING, CULTIVATE THREE TRAITS

A good fundraiser requires three character traits as much as any set of skills. These traits are first, a belief in the cause for which you are raising money and the ability to maintain that belief during defeats, tedious tasks, and financial insecurity; second, the ability to have high hopes and low expectations, allowing you to be often pleased but rarely disappointed; and third, faith in the basic goodness of people. While fundraising is certainly a profession, people who will raise money for any kind of group are rarely effective. Fundraising is a means to an end, a way to promote a cause, a very necessary skill in achieving goals and fulfilling missions.

7. FUNDRAISING SHOULD NOT BE CONFUSED WITH FUND CHASING, FUND SQUEEZING, OR FUND HOARDING

Too often, organizations get confused about what fundraising is and is not. If you hear that a foundation is now funding XYZ idea and your organization has never done work in that area nor have you ever wished to do work in that area, the fact that you are well qualified to do such work is immaterial. To apply for a grant just because the money is available and not because the work will

promote your mission is called fund chasing. Many groups chase money all over and, in doing so, move very far away from their mission.

Similarly, if your organization seems to be running into a deficit situation, cutting items out of the budget may be necessary but should not be confused with fundraising. When deficits loom, the fund squeezing question is, "How can we cut back on spending?"; the fundraising question is "Where can we get even more money?"

Finally, there is fund hoarding. Putting money aside for a rainy day, or taking money people have given you for annual operating and program work and being able to put some of it into a savings account is a good idea. Where savings becomes hoarding, however, is when no occasion seems important enough to warrant using the savings.

I know a number of groups that have cut whole staff positions and program areas rather than let money sitting in their savings be used to keep them going until more money could be raised. A group that saves money needs to have a rationale: Why are you saving this money? Under what circumstances would you spend it? Without some plan in mind, the group simply hoards money.

**If you are doing good work,
then you have a right to raise
the money to do it.**

Fund chasing, fund squeezing, and fund hoarding need to be replaced with an ethic that directs the group to seek the money it

needs, spend it wisely, and set some aside for cash-flow emergencies or future work.

8. FUNDRAISING IS AN EXCHANGE: PEOPLE PAY YOU TO DO WORK THEY CANNOT DO ALONE

Hank Rosso, founder of the Fund Raising School and my mentor for many years, often spoke about the need to eliminate the idea that fundraising was like begging. Begging is when you ask for something for nothing. If you are doing good work, then you have a right to raise the money to do it. What you must do is figure out how to articulate what you are doing so that the person hearing it, if they share your values, will want to exchange their money for your work. They will pay you to do work they cannot do alone.

9. PEOPLE'S ANXIETIES ABOUT FUNDRAISING STEM FROM THEIR ANXIETIES ABOUT MONEY

Anxiety about money is learned, and it can be unlearned. If you are ever around children, you know that they have no trouble asking for anything, especially money. In fact, if you say no to a child's request for money, they will simply ask again, or rephrase their request ("I'll only spend it on books"), or offer an alternative ("How about if I do the dishes, then will you give me the money?"). Everything we think and feel about money we have been taught. None of it is natural; none of it is genetic. In fact, in many countries around the world, people talk easily about money. They discuss what they earn, how much they paid for things, and it is not considered rude to ask others about salaries and costs.

We have been taught not to talk about money or to ask for it, except under very limited circumstances. Many of us are taught that money is a private affair. Having too little or too much can be a source of shame and embarrassment, yet money is also a source of status and power. Most people would like to have more money, yet most will also admit that money doesn't buy happiness.

As adults, we have the right — in fact, the obligation — to examine the ideas we were taught as children to ensure that they are accurate and that they promote values we want to live by as adults. Most of us have changed our thinking about sex and sexuality, about race, about age, illness and disability, about religion, marriage, how children should be raised, what foods are healthy, and much more. We have done this as we have learned more, as we have experienced more, or, as we have thought about what we value and what we do not. We need to take the time to do the same work with our attitudes toward money. We can choose attitudes that make sense and that promote our health and well-being.

Our attitudes toward fundraising are a subset of our larger attitudes toward money. The most important change we can make in our attitudes toward fundraising is to remember that success in fundraising is defined by how many people you ask rather than how much money you raise. This is because some people are going to say no, which has got to be all right with you. The more people you ask, the more yes answers you will eventually get.

Finally, if you are anxious about asking for money or would rather not ask, this is normal. But ask yourself if what you believe in is bigger than what you are anxious

about. Keep focused on your commitment to the cause and that will propel you past your doubts, fears, and anxieties.

10. THERE ARE FOUR STEPS TO FUNDRAISING: PLAN, PLAN, PLAN, AND WORK YOUR PLAN

Though humorous, this formula that I learned from a community organizer underscores the fact that fundraising is three parts planning for one part doing. I learned this later in my career, after having gone off half-cocked into many fundraising campaigns and programs. I meant to plan, I planned to make a plan, I just never got around to planning. I have learned (usually the hard way) that an hour of planning can save five hours of work, leaving much more time both to plan and to work.

Planning also avoids that awful feeling of "How can I ever get everything done," and that sense of impending doom. It moves us out of crisis mentality and means that we are going to be a lot easier for our coworkers to get along with.

There are a lot of articles and books on planning — I recommend reading some of them. However, the easiest way I have found to plan something is to start by defining the end result you want and when you want it to happen, then work backward from that point to the present.

For example, if you want your organization to have 100 new members by the end of next year and you are going to use house parties as your primary acquisition strategy, you will need to schedule five to seven house parties that will recruit 10 to 15 members per party. To set up one house party will require asking three people to host it (only one will accept), which will require identifying 15 or 20 possible hosts to carry out the number of house parties you want to have. The hosts will want to see materials and know what help they will have from you. The materials will have to be ready before the first phone call is made to the first potential host, and the first phone call needs to occur at least two months before the first party. So, the materials need to be produced in the next two weeks, hosts identified in a similar timeframe, calls made over a period of two or three months, and so on.

When you are tempted to skip planning, or to postpone planning until you "have some time," or to fly by the seat of your pants, just remember the Buddhist saying, "We have so little time, we must proceed very slowly." **GF**

KIM KLEIN IS PUBLISHER OF THE GRASSROOTS FUNDRAISING JOURNAL.

CLASSIFIEDS

FUNDING SEARCH: GRANTS DO EXIST. WE FIND THEM FOR YOU

Contact the RIGHT funder • 78,000+ funders investigated
20 years non-profit experience • Search includes free consulting
Customized report saves you time • Affordable searches from \$195

www.fundingsearch.com

707-823-2927 or nonprofit1@aol.com

The Non-Profit Assistance Group

ETAPESTRY IS THE LEADING PROVIDER OF WEB-BASED FUNDRAISING SOFTWARE

It tracks donors, prospects or alumni while managing gifts, pledges and payments. In its full form, eTapestry adds contact management, email, ecommerce, event registration and advanced executive analysis. As an Internet application, eTapestry can be accessed from any location. In addition, all backups, maintenance, and upgrades are included. eTapestry is used by over 3000 nonprofits and is ideal for organizations of all types and sizes. Revolutionizing the Charity World via Technology and Service.

Visit www.etapestry.com or call 888-739-3827

*Gracias Kim Klein & Stephanie Roth
for all your work on behalf of nonprofits!*

Community Impact
CONSULTING
CommunityImpactConsulting.com



The Nonprofit Membership Toolkit



Step by step, *The Nonprofit Membership Toolkit* shows how to create, manage, and sustain a dynamic membership program that will help a social change organization thrive. This book gives volunteers and staff the information and tools needed to understand their current members and attract new ones.

*Raise more money and power!
Order your copy today!*

TO ORDER CALL (800) 956-7739 OR VISIT
www.josseybass.com/go/chardonpress

Use code JBNPD and save 20%!

THE BOARD OF DIRECTORS of the **Grassroots Fundraising Journal** SALUTE

Kim Klein & Stephanie Roth

And all our Current and Past Staff and Consultants:

Nancy Adess | Jennifer Emiko Boyden | Leanne Bynum | Sotheary Chan | Adena Chung
Michael Cox | Bob Cooney | Claire Cunningham | Shelana deSilva | Deirdre Dolce
Shelly Doo | Jabir Faquir | Robin Ferguson | Priscilla Hung | Nan Jessup
Cici Kinsman | Eric Park | Rosi Reyes | Taylor Root | Danielle Walters

For 25 Years of Building a Strong Grassroots Social Justice Movement. Thank you!

Shelana deSilva | Charlie Fernández | Netsy Firestein
Miguel Gavaldón | Fred Goff | Helen Kim



PHONE & FAX: (415) 663-8562 • naedit@horizoncable.com

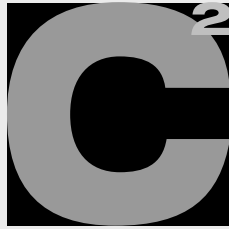
PROUD TO BE PART OF THE
**Grassroots
Fundraising Journal**
TEAM!

**Dear Grassroots Fundraising
Journal friends...**

Huge Congratulations on 25 magnificent years!
What an honor and a blessing it has been to be
your "design department" for the last 10 of them.

Big love & appreciation,
Cici Kinsman

C² Graphics | Oakland, CA | 510.655.6693



C SQUARED GRAPHICS

Novato Youth Center

Celebrating 30 Years!

CHILDCARE • FAMILY COUNSELING
PARENTING WORKSHOPS
INDOOR SOCCER • LATINO ADVOCACY
TUTORING • SCHOOL SITE SERVICES

www.novatoyouthcenter.org

(415) 892-1643 • 680 WILSON AVE, NOVATO, CA



Novato Youth Center
Protect • Nurture • Educate

ACLU
THE AMERICAN CIVIL LIBERTIES UNION

CONGRATULATES
the
Grassroots Fundraising Journal
for
25 YEARS
OF CREATING POSITIVE CHANGE
AND SOCIAL JUSTICE
THROUGH DONOR ACTIVISM AND SUPPORT



WWW.ACLUNC.ORG

**Congratulations Grassroots Fundraising Journal
on 25 years of outstanding
fundraising advice!**

The Elks have a strong tradition of helping those in need, and our communities need us now more than ever. The Elks National Foundation serves as the cornerstone of the Elks' efforts to build stronger communities. Contact your local Elks Lodge to talk about Elks programs that instill integrity in our youth, inspire the pursuit of knowledge and make the community as a whole a healthier, safer and better place to live. Visit www.elks.org/enf for more information.



Elks National Foundation
2750 N. Lakeview Ave., Chicago, IL 60614-2256
773/755-4728 (voice) • 773/755-4729 (fax) • enf@elks.org (email)
www.elks.org/enf (website)

*Thank you for the inspiration, leadership,
knowledge, insights, and tools*

MILLER ROLLINS

Michael P. Miller and Norma Rollins

93 Indian Lake Road
Putnam Valley, NY 10579
212-807-8719

michaelmiller@millerrollins.com
normarollins@millerrollins.com
www.millerrollins.com

**CRE Applauds
The Grassroots
Fundraising
Journal on
25 Great Years
of Supporting
Social Change**



Fran Barrett
Executive Director
(212) 894-3394
www.crenyc.org

CRE seeks a more just, equitable and livable city for ALL New Yorkers and sees community based organizations as KEY players in achieving that end. CRE works to ensure that community organizations have the information, resources and skills to achieve those results and that they leverage their communities' indigenous resources and leadership for change.

**Thanks
for your help!**



www.wildidaho.org

Idaho Conservation League

**thedatabank
congratulates you
on 25 years!**

PROGRESSIVE
TECHNOLOGY FOR
FUNDRAISING,
ADVOCACY, AND
COMMUNICATION.



1-877-603-0296

Like the Grassroots Fundraising Journal, our technology continues to evolve. That's why we still have the loyal customers that started with us in 1998.

Call for a free demo, and find out what's new.

Congratulations Grassroots Fundraising Journal!

In recognition of your 25 years of support to grassroots organizations and social change.

Kim Klein's work has been critical to thousands of Summer Program participants over the last 13 years.

***The Institute in Management
and Community Development
Concordia University
Montreal, Quebec, Canada***

2006 Summer Program
In Nonprofit Management and Community Development
June 12th – 16th
<http://instdev.concordia.ca>



Concordia
UNIVERSITY

Centre for
Continuing
Education



**University of Houston-Victoria
School of Arts & Sciences
Center for Nonprofit Leadership**

Undergraduate and Graduate Programs (online) • Leadership Institute
Organizational and Community Development • Internship Program

**Acknowledge and congratulate
Kim and the *Grassroots Fundraising Journal*
for
25 years of Exemplary Service**

**Announcing a Call for Papers:
2nd Annual Conference on Latino Quality of Life
October 11-13, 2006**

Contact: Jim Holm (holmj@uhv.edu)
Suzanne Clodfelter (clodfelters@uhv.edu)

Local girl makes good!



Kim Klein, Boulder High School Class of '72, Boulder, CO

The Community Foundation,
serving Boulder County, Colorado, proudly salutes
Kim Klein and the *Grassroots Fundraising Journal*
for 25 years of “courage capital”—
helping communities and organizations
“do good by doing well.”
Congratulations!



THE COMMUNITY FOUNDATION
SERVING BOULDER COUNTY

Thank you

for creating a
path that many
of us have taken to
create and sustain
social change.

With more change ahead,
we are proud to walk with you.

CompassPoint
NONPROFIT SERVICES **30th**
ANNIVERSARY



"Change, Not Charity"™

**Congratulations to the
GRASSROOTS FUNDRAISING JOURNAL
as it celebrates its 25th Anniversary!**

Funding Exchange
666 Broadway, 5th Floor
New York, NY 10012
212-529-5300 | info@fex.org

Appalachian Community Fund | Bread and Roses Community Fund | Chinook Fund
Crossroads Fund | Fund for Santa Barbara | Fund for Southern Communities | Hawai'i People's Fund
Haymarket People's Fund | Headwaters Foundation for Justice | Liberty Hill Foundation
McKenzie River Gathering Foundation | North Start Fund | San Diego Foundation for Change
Three Rivers Community Foundation | Vanguard Public Foundation | Wisconsin Community Fund

**Affordable,
easy-to-use
fundraising
software!**

**Online and
PC/Network
versions!**

**FREE
Demo CD!**

DonorPerfect. *Fundraising Software*

Thousands of nonprofits achieve amazing results with **DonorPerfect**. Find out how you can use its sophisticated, powerful tools to meet your development goals.

800-220-8111

www.donorperfect.com/dp1

GROW FUNDRAISING SUCCESS!



*Fundraising Consultants
Since 1979*

MAL WARWICK & ASSOCIATES, INC.

2550 NINTH STREET, SUITE 103

BERKELEY, CALIFORNIA 94710-2516

TELEPHONE 510-843-8888 FAX 510-843-0142

e-mail info@malwarwick.com

www.malwarwick.com

***Congratulations on a
quarter century of providing
expertise for justice!***

*CTWO thanks GF for its insight and persistence,
which have been so pivotal to our organization.
The progressive movement wouldn't be where it
is without Kim Klein and the whole Grassroots
Fundraising crew!*



*In Solidarity,
Your Friends at CTWO*

**C
T
W
O**

Center for Third World Organizing
trains grassroots organizers. For
information on our programs, visit our
website at www.ctwo.org

1218 East 21st Street
Oakland, CA 94606
510-533-7583 phone, 510-533-0923 fax,
www.ctwo.org, c2@ctwo.org

(Hey fundraising professionals: CTWO's development director is leaving us. If you're interested in joining our team, please contact us.)

FUNDRAISING FOR THE SMALL COMMUNITY



by **Kelvin Kent**
\$17.95

**A new look at real,
down-to-earth
fundraising**

**Available now from
www.bbotw.com**

**or by phone
877.289.2665
610.520.2500 fax**

Realistic and result-oriented
*Every fundraiser or Board Member
should read this effective book!*

See Kelvin Kent's website at
www.fundraising-books.com

Congratulations on
25 great years,
Grassroots Fundraising Journal!

FUNDRAISER
software

www.FundRaiserSoftware.com

*Kim Klein's Grassroots Fundraising Journal
(and Andy Robinson's Grassroots Grants)
changed everything about how we help our
clients win grants. Now we tell them,
"don't hire a grant writer - be a grant winner!"*

CONGRATULATIONS ON 25 YEARS!

Heather and Josh Denkmire

grantwinners.net

www.grantwinners.net 207.590.8540



Congratulations to the heroines behind the *Grassroots Fundraising Journal*.

We at the *Nonprofit Quarterly* salute you for creating and maintaining the most practical and progressive publication in the sector.

Innovative Thinking for the Nonprofit Sector.



Thanks **Kim, Stephanie** and the **Grassroots Fundraising Journal** for 25 years of working to Raise Money for the Revolution from the Revolution!

Grassroots Institute for Fundraising Training
Training · Consulting · Leadership Development for Social Justice



THE **SPIN** PROJECT

Salutes the *Grassroots Fundraising Journal* for 25 years of grassroots capacity building!

www.spinproject.org
Growing communications capacity

Congratulations on turning 25
You are our heroines!

ELLIS M.M. ROBINSON & DICK MARK
The Buttonwood Partnership

EllisRobs@aol.com • RFMIsland@earthlink.net

CONGRATULATIONS

Kim Klein & Stephanie Roth
on the 25TH anniversary of the
GRASSROOTS FUNDRAISING JOURNAL!

SUZANNE IRWIN-WELLS

415.383.9657 • siwfund@aol.com • www.irwin-wells.com
FEASIBILITY STUDIES AND CAPITAL CAMPAIGNS

cause effective
nonprofit resource development center

Salutes
*Grassroots
Fundraising Journal's*
Contribution to the
Sector

505 eighth avenue • suite 1212 • new york, ny 10018
212-643-7093 • fax: 212-643-0137
e-mail: info@causeeffective.org • www.causeeffective.org
Cause Effective, publisher of *The Special Events Toolbox*,
builds the capacities of other nonprofits to enlist human
and financial resources.

Bizzarro's Benefit Auctions

If your organization is planning a fundraising event and live auction, Bizzarro's Auctions will provide the services of a professional auction team for your event.

We participate in more than a hundred auctions per year and schedule our events on a first come, first served basis. Please call for more information.



650·363·8055

www.bizzarroauctions.com

2581 Spring Street • Redwood City, CA 94063
fax 650.363.8057 • email bizzaros@earthlink.net

Are you reaching your fundraising goals?

Imagine a software program that allows you to easily track donors, volunteers, plan events, and do moves management **effectively** and at **one amazingly low cost**. Think it doesn't exist?

Think again.

MissionAssist

- All inclusive – no additional modules to buy
- Fully customizable
- Easy payment plans available

Call 1-888-722-2033 for your
free trial today!

DONOR
STRATEGIES
INC 

www.donorstrategies.com

WORKER COOPERATIVE ★ UNION SHOP ★ GREEN BUSINESS

Congratulations
Grassroots Fundraising Journal
on your 25th Anniversary!

from

INKWORKS PRESS

(510) 845-7111 ★ www.inkworkspress.org



★ SINCE 1974: AFFORDABLE PROGRESSIVE PRINTING ★

Happy 25th, Kim! We love you!

Thanks for giving us the gift of education.

From Greg Mortenson, Jennifer Sipes and Kelli Taylor of

Central Asia Institute

and all of the students of Afghanistan & Pakistan.

www.ikat.org



KARMANG WAR REFUGEE SCHOOL - BALTISTAN, PAKISTAN

Volunteer Powered. Listener Supported. Community Radio
Now available in Denver at 1390 AM!

Independent
KGNU
Community Radio

88.5 FM
BOULDER

89.1 FM
FT. COLLINS

1390 AM
DENVER

93.7 FM
W A R D

www.kgnu.org

*For 25 years the Grassroots Fundraising Journal
has taught us all the ABCs of fundraising:*

A:

ASK FOR MONEY

B:

BE PROUD TO BE THE FUNDRAISER

C:

CONSIDER THE BEST INTERESTS OF YOUR
DONORS, LEADERS, VOLUNTEERS, STAFF, AND CONSTITUENTS.

S:

STAY TRUE TO YOUR MISSION.

*A thousand thanks to Kim, Lisa, Nancy, Stephanie, Nan, et al.
Congratulations on your Silver Jubilee!*

Joan Flanagan, Subscriber

sundance ad

girls
Inspiring all girls to be
strong, smart & bold

inc.

Happy 25th Anniversary!
Girls Inc. would like to honor Kim Klein for her dedication to our organization. Through her invaluable support, she has helped Girls Inc. raise funds to inspire thousands of girls to be strong, smart and bold.

Girls Incorporated of Alameda County
13666 East 14th Street - San Leandro, CA 94578
PHONE: 510-357-5515 - FAX: 510-357-5112
www.girlsinc-alameda.org



GRANTSEEKER TRAINING COURSES: Scholarships Available

The Foundation Center's grantseeker training courses are acclaimed by nonprofit professionals coast-to-coast. Crafted by specialists in adult education, these full-day courses help you gain insight into foundations, strengthen proposal writing and budgeting skills, get the most from online fundraising research tools, and evaluate funding prospects.

Under-resourced nonprofits in the Bay Area may now apply for scholarships to individual courses scheduled for spring 2006. These scholarships will provide for a portion of course registration fees, based on the organization's budget size. If you represent an organization with a budget under \$1 million, you may apply. This initiative is made possible by the Philanthropic Ventures Foundation.

For full details and an application form, contact the Foundation Center San Francisco Library or visit our Web site.

THE FOUNDATION CENTER
312 SUTTER STREET, SUITE 606 | SAN FRANCISCO | 415-397-0902
www.fdncenter.org/sanfrancisco

*The Fund Raising School
congratulates Grassroots
Fundraising Journal
for 25 years of success!*

Success is built on experience.

*Come learn fundraising from
the pros who know.*

**Customized, on-site training can
be tailored to your organization's
specific needs. Or choose our
regularly scheduled courses
nationwide, including:**

- Principles and Techniques of Fundraising
- Planned Giving: Getting the Proper Start
- Preparing Successful Grant Proposals
- Building the Annual Fund
- Managing the Capital Campaign
- Developing Major Gifts
- Interpersonal Communication for Fundraising
- Fundraising for Small Nonprofits



For information on the 2006 schedule, course content, or
registration, please call
(800)962-6692 or visit <http://www.philanthropy.iupui.edu>



VIVIAN M. LINDERMAN, MPA
PRINCIPAL

**SILVER CONGRATULATIONS TO
GRASSROOTS FUNDRAISING JOURNAL**

PHONE: 562-260-9825 WWW.BLUELOTUS-CONSULTING.COM

**Andy
Robinson**

P.O. Box 350 ♦ Plainfield, VT 05667
(802) 479-7365 ♦ 479-7366 (fax)

Fundraising ♦ Grantseeking
Nonprofit Business Planning ♦ Marketing
Board Development ♦ Facilitation
Workshops & Coaching

andyfund@earthlink.net
www.andyrobinsononline.com

Services to
grantmakers
and nonprofit
organizations



Consulting Group

15 years of experience and excellence...

Strategic Planning
Fundraising
Foundation and Corporation Grantsmanship
Major Donor Programs
Capital Campaigns
Board and Staff Retreats

office@drapergroup.com
www.drapergroup.com

Imagine

how EASY

fundraising

SOFTWARE

could be

FUNDRAISER
software
...right beside you

FLEXIBLE GROWTH PATH
Buy only what you need now.

TRAINING
Get up to speed fast.

UNRIVALED TECHNICAL SUPPORT
We care about your success.

DATA CONVERSION
Perfect every time. No surprises.

Free Demo – Visit us online or call today!

www.FundraiserSoftware.com • InfoGFJ@FundRaiserSoftware.com
800-880-3454 (US/Canada)

Frederick Douglass, the fugitive slave, will print a paper to be called the "North Star." It is said he received \$2,000 from England to establish the paper.

- Niles' National Register, October 1847



north star fund

www.northstarfund.org

Our praise and thanks to
Kim, Lisa, Stephanie
and all those at
Grassroots Fundraising Journal
for revolutionizing how
we approach money, power
and social change.

P E R S O N A L S

The Center for Responsible Funding (a 25 y/o Phila non-profit wking to diversify revenues for social change orgs) seeks smart, resource-laden, unambiguously progressive national journal to contribute to building the nonprofit social change sector in Philadelphia. Only *Grassroots Fundraising Journal* need apply. Will meet at Kim Klein and Stephanie Roth fundraising trainings at various spots around the country. Please wear *Choice in Charitable Giving* armband and bring *Jossey-Bass resource catalog* for easy ID.

Grassroots Fundraising Journal

Thanks for 25 years of sharpening
the toolkit for social change work
across the country!



Center for Responsible Funding

924 Cherry St, Ste 520 | Philadelphia, PA 19107 | 215 925-6140

Thanks to the following supporters of the **Grassroots Fundraising Journal**

Nancy Aleck
Andrea J. Ayvazian
Asian Pacific Environmental Network
Bay Area Women's & Children's Center
Susan Baydur
Jeff Blum
Karen Blumenthal
Darin M. Camarena Health Center
Camp Westminster
Kristen Cashmore
Nancy E. Cunningham
Lincoln Cushing
The DataCenter
Alison Davis
Merry Demarest
Deborah Dover
Emore Development Resources
Fritsi Ericson
Faithful Fools Street Ministry
Kim Fellner & Alec Dubro
Nancy Franco
Kathy Frederick
Don Gomes
Christine Graham
Brian Harrington
Michael Hirschhorn

Monica Hubbard
Mary Humphries
Neskowin Valley School
International Relations Center
Deborah Jones
Katherine King
Ann Lennartz
Libertae Inc.
Becky Liebman
Elise Lufkin
Marin Humane Society
Monica May & Maryann Osmond
Jean McCord, CFRE, McCord & Associates
Chris McCormack
Henry Messer
Jo Moore
Mount St. Joseph Center
Pat Muñoz
Natural Resources Foundation of Wisconsin
Michelle Niemier
Joan Noguera
Nursing Mothers Counsel
Barbara Patterson Consulting
Pax Christi USA
Ruth M. Peterson
Sonia Plata
PR Project

Jennifer Puff
Danny Reed
Valerie Reuther
Rockwell County Helping Hands
June Rostan
Dianne Russell
Safehouse Progressive Alliance
for Nonviolence
Nancy Sampson
Martin & Jane Schwartz
Amina Shahid-El
Barbara Sichel
Beverly Smirni
Soccer in the Schools
Speaking of Dance
Elizabeth Specht
Jo Ann Stuckey
Marion Sweeney
Karen Topakian
Scott Ullman
Ben Watkins
Western Carolinians for Criminal Justice
David Wight
Windham Child Care Association
WomenSafe Inc.
West Virginia Kids Count Fund

Congratulations from **TACS**.
Oregon loves the *Grassroots Fundraising Journal*.
Thank you for your brilliant leadership
in the nonprofit community.

In memory of Vicki Quatmann
and in gratitude for Kim's training.
Congratulations on your 25th Anniversary!
Save Our Cumberland Mountains

New York Foundation salutes you for believing
that community based organizations have strength
and resilience and reasons to be optimistic.

Kim, Stephanie, and *Journal* contributors —
Thanks for all you've taught us.
Fundraising for social justice is truly a political act!
Katherine Acey

Congratulations and thank you to my
wonderful *GFJ* friends. The *Journal* is the
#1 resource I recommend to all my clients!
Abrazos, **Emily Goldfarb**

I can honestly say that everything I know about
grassroots fundraising, I owe to Kim & Company!
Happy Birthday *GFJ*!
Lela DaVia, DaVia & Brown Associates

20 words for \$100? You have some nerve.
This is why you are such a good fundraiser.
Thanks for decades of inspiration.
Love, **Pam and Hillary**

...always an inspiration...
from your colleague in enabling social change...
Judy Levine

Mazel Tov Kim, Stephanie and everyone at *Grassroots Fundraising Journal*. Your wisdom makes us all savvier justice-seeking fundraisers. Thanks! **Marjorie Fine**

Environmental Health Coalition
congratulates Kim Klein for her outstanding contribution towards environmental justice by providing this amazing resource! 25 More!

Congratulations and Thank You!
The National Radio Project and “Making Contact” consider the *Grassroots Fundraising Journal* an indispensable resource!
Peggy Law

Congratulations on serving nonprofit and donor communities for 25 years.
KoaBooks.com,
publisher of Cindy Sheehan’s
Not One More Mother’s Child.

Congratulations Kim, Stephanie and the *Grassroots Fundraising Journal* for 25 years of outstanding inspiration, information, and instigation!
Thanks! **Dan Geiger**

Happy 25th Anniversary! Thanks for your work to improve fundraising in the conservation movement!
Training Resources for the Environmental Community

Thanks for giving me the tools to become a kick-ass fundraising activist, trainer and coach.
Mark Toney

Thanks for always being there to inform, advise, inspire and cajole us into more effective and sustainable fundraising! Happy Birthday!
ACCESS / Women’s Health Rights Coalition

Congratulations *Grassroots Fundraising Journal* on your Silver Anniversary! We couldn’t fund peace and justice without you and we wouldn’t want to!!
Agape Foundation, Fund for Nonviolent Social Change

Thank you Kim and Stephanie for all your advice and support over the years. Around here, you are the voice of god(dess).
Michael McKee, Sandy Boyer, & Tom Waters, New York State Tenants & Neighbors Coalition

Congratulations to the *Grassroots Fundraising Journal* and Kim Klein, who helped us understand that we make the road by asking!
Highlander Research and Education Center

Congratulations and thank you to Kim, Stephanie, and the GFJ for making fundraising so fun and so accessible for all.
Jackie Kaplan,

Get Sums Development, Coaching & Consulting

Grassroots Fundraising Journal is my favorite fundraising resource — practical, appropriate to community organizations. I refer to it again and again. Brava! to 25 great years.

Judy Auster Miller, grantmaker turned fundraiser

Organizing rules! We learn from every issue. Thank you, Kim, Stephanie, and the GFJ staff.
Nick Allen and the staff at Donordigital

Congratulations to *Grassroots Fundraising* for contributing to building effective social justice organizations.
Victor Quintana

Kim & Stephanie — Thanks for being colleagues, mentors and friends. Congrats on 25 fabulous years of the *GFJ*.
xo **Russell Roybal**

Congratulations to the *Grassroots Fundraising Journal* from the
Center for Community Change

We gratefully acknowledge the visionary contributions of Kim Klein and Stephanie Roth. The *Grassroots Fundraising Journal* truly empowers people to take hold of the financial futures of their organizations.
Gary Delgado and the Applied Research Center

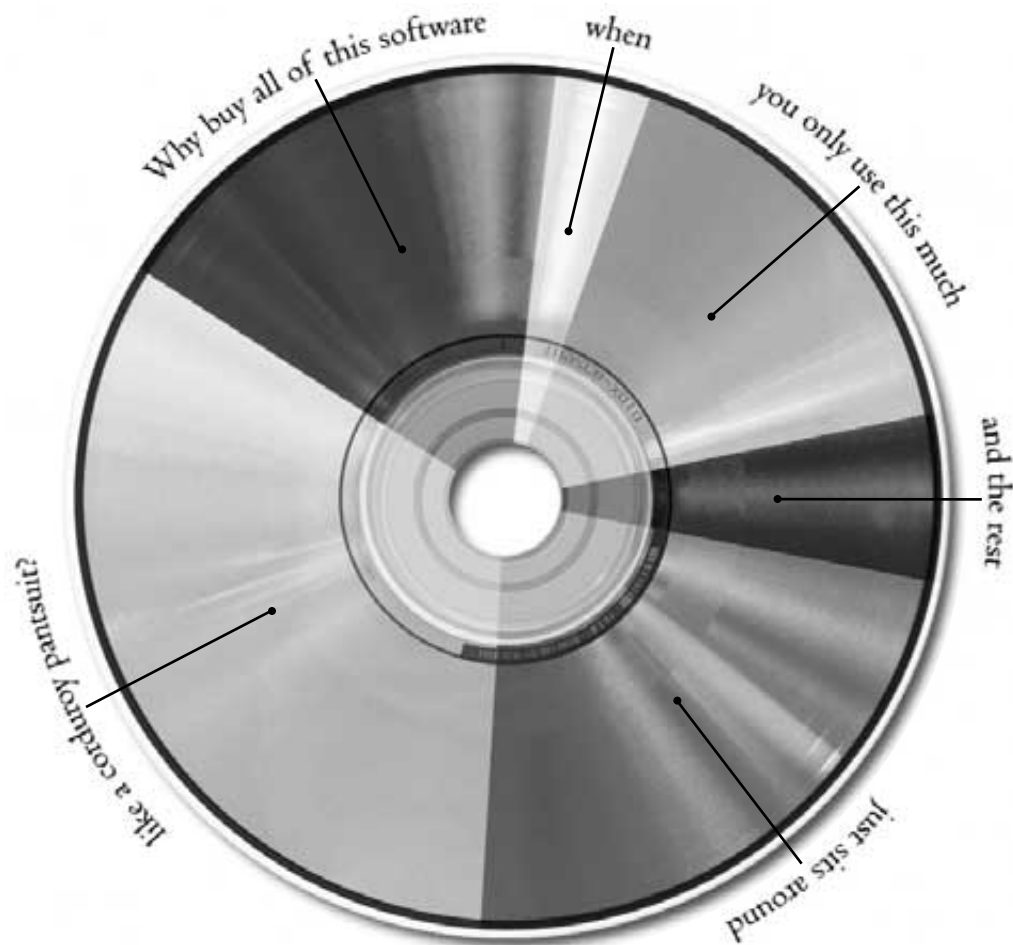
Congratulations to 25 years of showing the way! Felicidades por los 25 años demostrar el camino!
Transnational Institute for Grassroots Research and Action (TIGRA)

Congratulations, Kim and thank you for 25 years of dedicated commitment to the nonprofit sector. We are all indebted to you.
Mary Louise Mussoline

Congratulations to the *Grassroots Fundraising Journal* and to Kim and Stephanie on 25 wonderful years!
Nan Langen Steketee

Thanks for inspiring us to hustle & BS our way towards sustainable organizations... and to always laugh along the way.
Love, Manami & Mimi

**Congratulations *Grassroots Fundraising Journal*,
on 25 Years of Teaching Nonprofits
How to Raise Money!**



eTapestry is designed to make fundraising more efficient. Our online format allows you to adjust the features you need over time so you're not paying for items you don't use. Try the new Needs Assessment at eTapestry.com to find a combination that will save you money and frustration.

eTapestry
888.739.3827 www.etapestry.com

ZIMMERMAN LEHMAN

assists nonprofits with development, especially individual fundraising, board and organizational development, and coaching. See our trainings, publications and free e-newsletter at www.zimmerman-lehman.com.

Bob Zimmerman or Ann Lehman, San Francisco, CA
contact@zimmerman-lehman.com
 (800) 886-8330 ■ (415) 986-8330

ZIMMERMAN ♦ LEHMAN



forging futures for nonprofits

EXPERT FUNDRAISING COACH

Put my twenty-nine years of fundraising experience on retainer and call on my expertise whenever you need it — new effective strategies designed just for you, one-on-one coaching with your askers, objective help with revamping fundraising, finishing up that never-ending campaign, fresh ideas on finding and keeping leadership... whatever you need. Call to discuss your options.

Burke Keegan Boards and Fundraising ■ www.BurkeKeegan.com ■ (415) 927-7752

ANDY ROBINSON — Training and Consulting

Fundraising • Grantseeking • Nonprofit Business Planning • Marketing Board Development • Facilitation • Workshops & Coaching

25 years experience. Specializing in the needs of grassroots groups working for human rights, social justice, and environmental conservation. Author of Grassroots Grants, 2nd Edition and Selling Social Change (Jossey-Bass) and Big Gifts for Small Groups (Contributions Magazine).

PO Box 350, Plainfield, VT 05667 ■ (802) 479-7365 ■ fax: (802) 479-7366
andyfund@earthlink.net ■ www.andyrobinsononline.com

INTEGRATED DEVELOPMENT CONSULTING

Helping nonprofits build successful organizations

Do you need assistance with... strategic planning & development planning?... building your membership?... board development?... systematizing fundraising?... message development?... direct mail?... staff coaching?... More? Through training, facilitation, and individual consultation, we can help you strengthen your nonprofit. Call Amy to learn more.

1115 W Mead Avenue, Salt Lake City, UT 84104
 (801) 533-8375 ■ fax: (801) 355-6236 ■ amyconnor@earthlink.net

FUNDRAISING CONSULTATION BY PHONE

Expert help by the hour to

- ++ Write your next appeal letter
- ++ Expand Board fundraising
- ++ Raise more money from your current fundraising activities
- ++ Critique your grant proposal
- ++ Discover new donor prospects

Diane Brown (707) 823-2927
www.NonProfitAssistance.com

The Non-Profit Assistance Group
DianeB100@aol.com

LISA HOFFMAN • CONSULTING

Major gifts, individual and institutional giving.

Coaching, training, board and staff development, retreat and meeting facilitation, development plans.

HELPING NONPROFITS THRIVE!

(415) 759-0476 • lisahoffman@sbcglobal.net

MARY LOUISE MUSSOLINE

DEVELOPMENT • CONSULTING
 TRAINING • FUNDRAISING
 2969 N. Shepard Avenue
 Milwaukee, WI 53211-3435
marylouise@wi.rr.com
 (414) 801-8212



GRASSROOTS INSTITUTE FOR FUNDRAISING TRAINING (GIFT)

Fundraising training and consulting for GRASSROOTS ORGANIZATIONS that want to:

- Diversify funding sources
- Increase financial sustainability
- Raise money from individual donors
- Build a strong fundraising team
- Develop fundraising plans and more!

(303) 455-6361 ■ email: generalinfo@grassrootsinstitute.org



JO MOORE ASSOCIATES

Fundraising and Organizational Development Consultants
 Working in partnership with nonprofits to

- Identify growth opportunities
- Build fundraising capacity
- Develop an effective team of board, staff and volunteers

(773) 296-0933 ■ email: jomooreassociates@hotmail.com

Christine Graham — BETTER LETTERS

If you've got a phone and an e-mail address, you can access the fundraising advice and skills of Christine Graham, author of books and references on fundraising, and consultant to hundreds of New England nonprofits for over 35 years. Fundraising letter writing services, along with proven recommendations for your community mailings, can make a difference with each mailing.

Check www.cpgfundraising.com for details!

PEGGY MATHEWS CONSULTING

Looking for a consultant whose practical experience is with community-based, grassroots-led organizations — who understands your group's unique challenges advancing its mission on limited resources? Twenty-eight years of proven experience building, managing and fundraising for social change organizations of all sizes. Consultant, coach and trainer specializing in fundraising and organization management. "Helping organizations work smarter not harder."
pegmathews@earthlink.net ■ (423) 562-8189 ■ 125 Grose Lane, Jacksboro TN 37757

HOLLY FINCKE — Consulting for Social Change

Holly Fincke can help you develop a strong fundraising plan and dynamic strategies to cultivate grantmakers and donors, helping you drive your plan forward with tailored trainings and coaching. She is expert in crafting proposals and communications materials, executing donor campaigns, and developing organizational leadership and program plans — all from a social justice perspective.

Oakland, CA ■ (510) 336-0719 ■ fincke@sbcglobal.net



ErnestMark CONSULTING provides services for small to large social justice organizations with programs in environmental justice, social services, community arts, community development and youth development. Services include group facilitation, individual coaching, strategic planning, organizational development and customized workshops.
 1125 McKinley Avenue, Oakland, CA 94610 ■ phone & fax: (510) 839-1375
ernest@ernestmark.com ■ www.ernestmark.com

CPG ENTERPRISES

For you, your board, and volunteers: practical, readable, proven advice on capital campaigns, annual fundraising, asking for money, hiring staff, writing grant proposals and instilling true philanthropy in your community.

Publications by Christine Graham
www.cpgfundraising.com



NATALIA LÓPEZ

- Strategic Planning
- Facilitation
- Board Development
- Fundraising Coaching & Training

415.282.6941 • FAX: 415.229.7738 • EMAIL: lopez186@sbcglobal.net

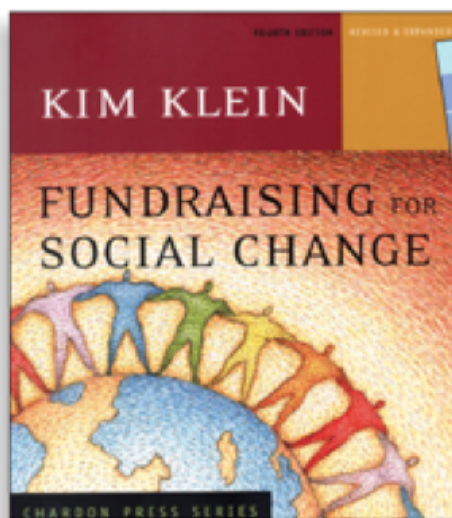
BLUEPRINT FUNDRAISING AND COMMUNICATIONS

We believe innovative organizations and passionate people can change the world. Blueprint helps grassroots organizations inspire the philanthropy they need to achieve their missions. We successfully serve clients in Canada and the US. Visit our website or call Andrea Seale, CFRE, Principal.

Vancouver, Canada ■ Toll free: (866) 682-6582
info@blueprintfundraising.com ■ www.blueprintfundraising.com

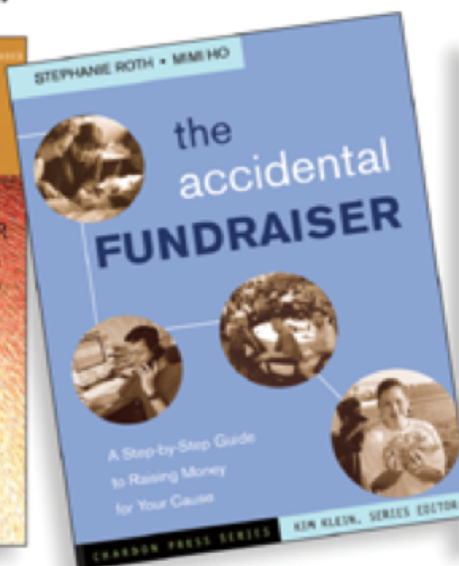
Congratulations, *Grassroots*, on 25 years of social change!

Here's what you'll need for the next 25.



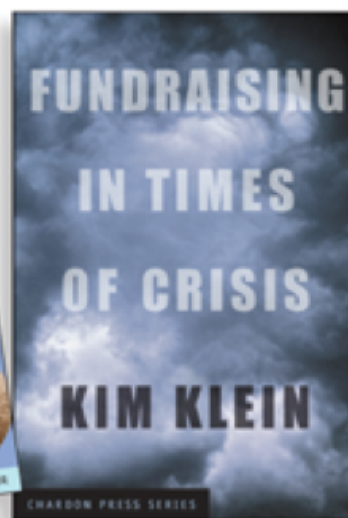
0-7879-6174-4 • Paper
\$36.00 US/\$46.99 CAN

Establish, maintain, and expand a successful community-based fundraising program with the practical, hands-on fundraising techniques in this bestselling classic. Now in its fourth edition, this is one of the most widely used fundraising books in the United States.



0-7879-7805-1 • Paper
\$29.95 US/\$35.99 CAN

Are you a volunteer for an organization, school, or project? Here's a how-to resource of easy, proven strategies for raising money from your community. Includes a wealth of worksheets and practical tips.



0-7879-6917-6 • Paper
\$24.95 US/\$35.99 CAN

Renowned consultant Kim Klein helps nonprofits plan, implement, and evaluate strategies for getting through any crisis.

For these and other resources for social change in the Chardon Press Series from Jossey-Bass, visit www.josseybass.com/go/chardonpress

JOSSEY-BASS™
An Imprint of **WILEY**
Now you know.

**Grassroots
Fundraising
Journal**

3781 Broadway • Oakland, CA 94611

ADDRESS SERVICE REQUESTED

PRSR STD
US POSTAGE
PAID
PERMIT NO. 271
TUCSON, AZ

