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LETTER FROM THE ASSOCIATE PUBLISHER

JENNIFER EMIKO BOYDEN

You may have noticed in the 25th Anniversary issue of the *Journal* that among our staff and board, pets outnumbered children by five to one; I'm one of the few parents of a human baby. Before I had my daughter, I worked downstairs from the folks at Grassroots Fundraising. I'd often see Kim and Stephanie as they were coming and going from one meeting to the next, and I'd regularly bump into Nan as she was preparing to mail issues of the *Journal* to new subscribers or bulk orders of *Getting Major Gifts*.

I knew they were a hard-working team, and I knew the importance of their mission. I had seen first-hand the problems and frustrations with relying too heavily on grants from foundations: having to jump through hoops for program officers, too many strings attached to the money, valuable programs losing funding because of a shift in a foundation's interest. When an opportunity came to join Grassroots Fundraising, I jumped at the chance to help nonprofit organizations diversify their funding and build community support for their work.

My daughter is now two years old — curious, energetic, and full of life. I don't want to shelter her, but I do dread the day when she starts to fully comprehend the inequities of the world. Recently, at the park, Naomi's grandma explained to her that the man sleeping on the bench didn't have a home to go to or a bed to sleep in. Naomi said she was "worried" and "sad" and tears welled up in her eyes. I know that as Naomi grows up, the concept of homelessness will settle in as one of life's harsh realities. But I hope the compassion and concern she expressed that day will not fade.

It is this same sense of compassion and concern that drives the work of nonprofit social justice organizations like yours, and this issue of the *Journal* presents a collection of articles that will help you raise money for your cause.

We reprint from a River Network publication Pat Munoz's excellent, in-depth description of monthly giving programs: the benefits they bring, how to build and maintain them, and where to go for support services and find examples of nonprofit organizations with similar programs. Next, Susan Studer King provides a step-by-step case study of a successful house party that raised more than \$5,000 toward blocking a legislative amendment that would have rolled back Ohio's water quality laws. Then, Marianne Philbin and Jo Moore discuss why fundraising teams sometimes get stuck in the goal-setting process and propose ways you can move forward while setting realistic goals you can stick with. Finally, Manami Kano reviews a new book on how board members can best work with nonprofit executives and staff by moving into a leadership mindset, particularly one that generates creative problem-solving to advance the organization's mission and goals.

An important reminder: our conference, Raising Change: A Social Justice Fundraising Conference, taking place August 4–5, 2006 in Berkeley, CA, is selling out fast. Early-bird registration closes on May 12th, so don't delay! Register at www.grassrootsfundraising.org/raising_change.

Monthly Giving Programs:

THE BASICS

PAT MUNOZ

A Monthly Giving Program, sometimes called a Pledge Program or a Sustainer Program, is a program under which members or donors are asked to commit to contributing a specific amount on a monthly or quarterly basis. It is much like traditional church “tithing” programs, where churchgoers commit to putting a certain amount in the collection plate each week.

WHY HAVE A MONTHLY GIVING PROGRAM

A monthly giving program is a logical extension of an existing individual membership or donor program and is an excellent strategy for raising general operating support. Because participants commit to giving a monthly or quarterly amount and to having it automatically deducted from their bank account or charged to their credit card, the income generated is predictable and reliable. For participants in the program, it can increase an organization’s renewal rates to as high as 90 percent or more, and double, or even triple, annual giving. It is a particularly appropriate program for hard economic times, or for groups serving low-income communities or young people, because it allows people with little money to make a significant contribution without feeling the pinch of a large gift given at one time.

REQUIREMENTS FOR A SUCCESSFUL PROGRAM

In order to run a successful monthly giving program, your organization must have the following in place:

- A compelling mission, effectively communicated
- A commitment to thanking contributors regularly and keeping them informed
- A base of committed, loyal individual members or donors (the more, the better)
- Adequate time and resources to manage the program
- Software that will allow you to record and track monthly payments, or a service provider who will handle this for you
- A commitment from staff and board to build the program

- The ability to accept credit card charges, electronic funds transfers, or both

BEST PROSPECTS

Particularly good prospects for monthly giving include the following types of people:

- Board members
- New members
- Members who regularly give several gifts a year, or who send in unsolicited gifts
- Members who are already using a credit card to charge gifts

Research shows that new members, those whose first gift has been received within the last six months, are nearly twice as responsive to a monthly giving request as those who have already renewed their membership. The optimal time to solicit these new members for monthly giving is three or four months after they join.

GETTING STARTED

Once you have decided that you want to start a monthly giving program, you will need to market it to your supporters. It is important to make your monthly givers feel special, so you should come up with a catchy name, such as “Friends of Little River,” “River Advocates,” “River Defenders,” or something similar. While there are various ways to publicize such a program, including personal requests, events, articles in your newsletter, and so on, two methods stand out: telephone requests and invitation letters (see the sample letter on page 6).

Your telephone request or invitation letter announcing the new giving option should include the following elements, each of which is discussed below:

- A compelling reason for joining the program
- Benefits to the giver
- Suggested amounts of monthly pledges
- Methods of payment

A Compelling Reason for Joining

Here you should clearly articulate your own special mission and its importance. You could also point out that the program reduces the need for mail or paper, ultimately saving trees, and that by joining, participants will be helping to create a reliable source of support, but the organization's good work is definitely the number one reason people will join.

Benefits to the Giver

Stress that by joining the program, the donor will be supporting and empowering the organization to do the important work it does so well. Additional benefits might include no more renewal mailings and the ease of giving. Some organizations use a premium, such as a book, hat, calendar, or map, as a further incentive to join.

Suggested Amounts

Most experts say that monthly pledges of \$5 to \$25 work best, with averages usually between \$10 and \$15 per month. It is probably a good idea to provide an "other" option on your response form where people can write in an amount; it's also wise to specify a minimum monthly amount that will allow you to recoup your costs (somewhere between \$5 and \$10 per month).

Methods of Payment

To work well, monthly giving programs must be kept simple. The downfall of many programs has been trying to send out monthly reminders and track participants who

only send their checks sporadically. Most experts recommend limiting methods of payment to credit cards and electronic funds transfer.

Credit Cards. If you do not already allow your members to pay their dues and other charges by credit card, you will need to set up this option with a local bank. The bank usually takes between 3 and 5 percent of every transaction made by credit card, but this amount will be more than offset by better cash flow and reliability in pledge fulfillment. In addition, you will gain a few donors who would not have otherwise joined or who will give more by credit card than they would have given by check. If you are short on administrative staff to handle this work, there are service providers who will do it for you (see Resources box below).

Electronic Funds Transfer (EFT). Electronic funds transfer involves sending funds from one bank account to another via a computer network. We all use EFT these days, whether through an automated teller machine at the local supermarket or with direct deposit of our paycheck into our bank account. EFT can also be used by your members to pay their monthly (or quarterly) pledges to your organization.

It is probably best to set EFT up through a service provider, as it can be a costly and complicated process. Using a provider will also save you time and hassle in processing monthly gifts. Charges to set up a program start at about \$400, and the cost to maintain it ranges from \$30 to \$100 per month thereafter.

Resources

ORGANIZATIONS

Examples of nonprofit organizations that have monthly giving programs:

Californians for Justice

(510) 452-2728 • www.caljustice.org

Chicago Foundation for Women

(312) 836-0126 • www.cfw.org

Peace Action

(301) 565-4050 • www.peace-action.org

The Potomac Conservancy

(202) 608-1188 • www.potomac.org

SERVICE PROVIDERS

These companies will help you plan and implement your monthly giving program for a fee, including processing monthly credit card/EFT payments.

Groundspring.org

(415) 561-7833 • www.groundspring.org

Network for Good

(866) 650-4636 • www.networkforgood.org

JustGive

(866) 587-8448 • www.justgive.org

CHI Cash Advance

(888) CHI-0500 / (914) 923-0500 • www.caringhabits.com

EFT Corporation

(800) 338-2435 • www.etransfer.com

WEB SITES

www.caringhabits.com — The site of Caring Habits, Inc., a firm specializing in helping nonprofits establish monthly giving programs, has lots of good information, including links to other relevant materials.

www.donordigital.com — Donordigital helps nonprofit organizations, candidates, and socially responsible companies use the Internet for fundraising, advocacy, and marketing.

www.harveymckinnon.com — Harvey McKinnon is the author of *Hidden Gold: How Monthly Giving Will Build Donor Loyalty, Boost Your Organization's Income & Increase Financial Stability*. (Order online or call (800) 815-8565 and ask for the 15% nonprofit discount.) A thorough coverage of the subject by the leading expert in the field, who has introduced hundreds of environmental organizations to the concept of monthly giving.

NORTHWEST ENVIRONMENT WATCH

Seattle • Victoria

friend, n. one that gives assistance, ally, teammate, colleague, patron, supporter, benefactor; angel

Dear Friend,

It's nice to get John and Alan out of the office once in a while.

After all, our authors are great at talking about their work. So we're constantly sending them out for interviews, television appearances, lectures, speeches, bookstore readings, and meetings with key government officials.

Of course, putting the authors in front of more people is only one way we change minds and policies. We get information and ideas to leaders who need them. Because of our reputation, local leaders even come to us for information and advice.

Your contributions make it all possible. Thanks!

That's why this letter, like all our letters, is addressed, *Dear Friend*. You've already shown that you're a true friend of Northwest Environment Watch with your past contributions. Now you can lend your support in an easier and more convenient way—by joining the NEW Friends monthly giving program.

This letter is your invitation to become a charter member of NEW Friends, a monthly giving program that allows you to contribute through automatic bank or credit card transfers. When you join NEW Friends, you'll continue providing information and solutions to those in positions of power, but in a way that is easier for you and makes your contribution go further.

Automatic funds transfer — common throughout Canada and Europe — is secure and convenient. Your monthly bank or credit card statement will clearly show how you have given, and your annual donations will be easy to track for tax purposes. You may change your pledge or quit at any time. Your membership with Northwest Environment Watch will be automatically renewed each year as long as you are a member of NEW Friends — no more renew-by-mail forms!

Why are we asking for month-by-month gifts instead of a one-time donation? The work of fostering a sustainable society requires long-term commitment. At Northwest Environment Watch, we're in it for the long haul. Just as regional decision makers need dependable information, we need predictable, stable funding to provide that information. Automatic monthly gifts provide us with the day-to-day support we need, in a way that's more convenient for you and much more cost-effective for us.

That means your contribution works harder changing more minds.

For just 33¢ a day, \$10 a month, you help get John and Alan out of the office more often.

For 66¢ a day, \$20 a month, you help get more of our facts in media across the continent: newspaper articles, magazine excerpts, and television and radio interviews.

For \$1.00 a day — less than the price of a daily cup of coffee — you help send more books to local leaders, educators, and concerned citizens.

Even if you give just 25¢ a day, you'll save yourself time and know that your contribution is buying change in the world, not staples and paper clips. You'll be putting more of your money to work heading our region in a healthier direction.

Right now, you can join as a charter member of NEW Friends. To show our appreciation, we'll send you an autographed copy of *This Place on Earth*, or another book if you wish. You can keep it, or give it to a friend or colleague whom you'd like to introduce to Northwest Environment Watch. What we won't send you are coffee mugs, T-shirts, or tote bags emblazoned with our logo.

You will have the option of subscribing to our new electronic newsletter though. It will keep you updated about the day-to-day work you make possible. You'll get an inside picture of Northwest Environment Watch that few ever see.

Your monthly pledge is one of the best ways to protect the health of our region's natural and human communities. It's convenient, hassle-free giving that makes a difference.

Now that's an investment worth making. I look forward to hearing from you soon. Please call if you have any questions.

Sincerely,

Steve Sullivan
Membership Director

P.S. Joining NEW Friends is an investment worth making. Your monthly support will provide the stable funding we need to give local leaders dependable information. Plus your Northwest Environment Watch membership will be automatically renewed each year. You will contribute in a safe and secure way that's more convenient for you and more cost-effective for us, so more of your money goes to work changing minds and changing policies. Thanks for being a friend.

1402 Third Ave., Suite 1127 • Seattle, WA 98101-2118 • 206-447-1880 • new@northwestwatch.org • www.northwestwatch.org

SAMPLE MONTHLY GIVING ENROLLMENT FORM

Yes, I accept your invitation to become a charter member of NEW Friends.

Here's my monthly contribution of:

- \$10 \$15 \$20
 \$25 \$_____ (>\$8 Minimum)

I prefer to donate by one of the following methods:

Automatic Bank Transfer

I've enclosed a check for my first NEW Friends contribution.
Automatic transfers will begin the following month.

Signature required _____

Credit Card

I prefer to pay by Visa or Mastercard each month.

Card no. _____

Signature _____ Expires _____

Phone _____ E-mail _____

- Please sign me up for the NEW Friends electronic newsletter.

E-mail _____

Contributions are tax deductible to the full extent of the law.
Please see other side of this form for important information.

The advantage of EFT is that it has a better renewal rate than credit cards, since credit card charges are often declined during the holiday season, and people change their cards or let them expire much more frequently than their bank accounts. The disadvantage is that in the United States, contributors are more comfortable with using credit cards than electronic funds transfer. One option is to start your program using the credit card method and then expand to EFT once you have a core group you can convert.

Whether you are recruiting by phone or by mail, you must provide your prospects with an enrollment form and a return envelope. (See sample enrollment form above.)

Response rates to monthly giving solicitations vary widely. On telephone requests to new members, a 10 percent response rate is not unusual. The response to an invitation letter is more likely to be between 2 and 5 percent.

ACKNOWLEDGING MONTHLY GIVERS

Like all donors, monthly givers must be thanked for their gifts. It is important to send them an acknowledgment and thank you when they first join the program. Most experts feel that it is not necessary to thank them for each monthly gift. A once-a-year thank-you letter summarizing your achievements and letting them know that unless you hear otherwise, you will renew their commitment for another year (or perhaps asking them to consider upgrading their commitment to a higher amount) is probably enough, provided that they are also receiving regular information about your activities through a newsletter,

bulletin, or some other means. You should also list these givers in your Annual Report.

Once you have introduced the program, you should continue to market it forcefully to your members. Present it as an option in other mailings (special appeals, renewals, annual reports), include information about the program on your website, and encourage people to sign up for it at your events. An occasional article in your newsletter about an individual who has decided to make this commitment is also a good strategy. You may want to repeat the invitation letter whenever you have a large influx of new members, since they appear to be among the best prospects for this program. Your reasonable long-term goal is to enroll between 5 and 10 percent of your regular members in the program.

A monthly giving program is an effective way to increase your renewal rate and upgrade giving among your regular members or donors. A good program will take time and resources to build but, in the long run, will help you develop a stable and diversified base of support. **GFJ**

This article first appeared in the River Network's River Advocate Fundraising Guide and is reprinted here with permission. The author gratefully acknowledges the ideas and suggestions for this article provided by Harvey McKinnon, Amy O'Connor, Ellis Robinson, and Andy Robinson.

PAT MUNOZ IS THE PROGRAM MANAGER IN RIVER NETWORK'S WASHINGTON, DC OFFICE. WWW.RIVERNETWORK.ORG.

A Fresh Approach TO A HOUSE PARTY *Pays Off*

BY SUSAN STUDER KING

The Ohio Environmental Council is a statewide nonprofit advocacy organization based in Columbus. Like a lot of nonprofit organizations, the Council had become overly reliant upon foundation grants for funding. At one point in our not-too-distant past, more than 90 percent of the organization's budget came from grants, a fact that most *Grassroots Fundraising Journal* readers would recognize as unhealthy — even downright dangerous.

This unbalanced funding scenario proved to be fatal to my beloved factory farm reform program in 2002. At the time, the Council was the only game in town when it came to opposing the environmental dangers of Ohio's influx of mega factory farms. We were organizing grassroots citizen groups, serving on an important state factory farm rules committee, and garnering media around the state. Our work was making a difference — until the foundation that provided the bulk of the funding for the program made "strategic changes to their funding priorities." Translation: no more funding for work on factory farms.

As a result of depending almost entirely on one grant, the program I had worked for several years to develop was virtually wiped out. I bitterly described this situation using "F" words — I thought the foundation was "fickle" and had succumbed to "fads" in funding. Their new funding priorities just did not match the needs on the ground in Ohio and did not fit our organization's mission.

While I had certainly heard my director talk about the need to diversify our funding base, now I fully realized the significance of her words. Not long after, the organization made the move to hire a development director to raise unrestricted general revenue. Having witnessed the organization struggle to find the right person for the position

and with my fresh appreciation for the need for increased funding from individual donors, I decided to leave my comfort zone in program work and threw my hat in the ring for consideration.

I got the job and now, after two years, I'm proud to report that we have doubled our income from major gifts and significantly reduced our dependency on grants.

One-on-one meetings with donors have been the primary way in which we have raised funds and grown our major gifts program. Second in importance have been house parties. Adding a new twist to an old model, we found a formula for turning

*Adding a new twist to an old model,
we found a formula for turning a
good event into a great event*

a good event into a great event — one that not only raises more money, but also involves the board of directors and other supporters in critical donor cultivation efforts.

The rest of this article describes a recent house party we held and what contributed to its success.

HOUSE PARTY PLANNING

Two of our board members who reside in the same college town offered to host a house party to raise funds for the Ohio Environmental Council. During the planning phase of the event, the board members helped to line up meetings with other prominent members of their community who were interested in conservation issues. At these meetings, "the ask" was to serve on the House Party Host Committee. Host Committee members' responsibilities included attending the house party, making a donation to the organization, and supplying names of friends and colleagues to invite to the party. A total of eight individuals or couples served on the host committee, including the two board members and their spouses.

The major innovation for this house party was that, instead of an entry or “ticket” price, as we had done before, we asked guests to “bring their questions and their checkbooks,” letting them know that contributions would be collected at the event. We hoped that after attendees heard about the great work we were doing and the urgent need we faced they would be inclined to give more than the \$35 or \$50 we might have otherwise received using the old “ticket” method. Plus, we knew a number of people were being invited to the party who had the capacity to give much larger gifts.

The reply card sent with the invitation also included an opportunity for people to give if they could not attend. We received a number of contributions this way, too.

LOGISTICS AND DETAILS

Invitation: The host committee came up with the names of more than 200 friends and colleagues, which they gave to the staff, who designed, printed, and sent the invitations on behalf of the hosts. The invitation included a response card and envelope and asked for an RSVP by a certain date. We asked the board members to make follow-up calls to folks who didn’t respond by that date.

Food and Drink: A few members of the host committee coordinated food and beverages. The hosts had the option of hiring a caterer or making the food themselves. They decided to make the food themselves and provided a

hearty selection of hors d’oeuvres, cheese and crackers, other finger foods, and wine. We asked them to keep track of their food costs and we recorded these as in-kind contributions.

Messaging: Rather than make a generic pitch for support at the house party, we decided to ask the attendees to support a specific — and particularly urgent —

Rather than make a generic pitch for support at the house party, we decided to ask the attendees to support a specific — and particularly urgent — campaign to protect Ohio’s wetlands.

campaign to protect Ohio’s wetlands. At the time, the state legislature was working on a contentious state budget. In the middle of the night (literally), a state representative had slipped a stealth, developer-backed amendment into the budget bill that would gut protection for Ohio’s wetlands and streams. The amendment was not only bad policy, it was enacted through a bad process. We dubbed this attempted rollback of Ohio’s water quality laws the “Bulldozer Amendment.” As part of our strategy to stop the amendment, we wanted to raise money to run radio ads in key legislative districts. We decided that this would be the basis of our fundraising at the house party.

Key Points for the House Party Pitch

We have an ambitious goal in front of us, we need their help; ask that they give generously to this effort.

State the goal:

Tonight our goal is to raise enough money to combat the Bulldozer Amendment and air radio ads in targeted districts around the state — around \$10,000. We hope to raise a fair amount toward that goal tonight. In order to do that, we hope you’ll consider a stretch beyond what you thought you might contribute.

- If you are able to make a gift of \$500 — then please do so now.
- If you think you can give \$250, that would be extraordinary.
- If a \$100 gift is what you had in mind, that’s great.

Anything you can give will get us one step closer to stopping the Bulldozer Amendment.

Repeat our qualifications:

We know the Ohio Environmental Council has the expertise, organizational ability, and experience to defeat the Bulldozer Amendment.

State the challenge:

That is why we decided to dig deep and give what for our families is a fairly significant gift — and we challenge you to do the same.

Our challenge to you: As board members, we have both pledged to match your gift dollar-for-dollar up to a total of \$1,000 each to go toward this extraordinary organization and their efforts to protect Ohio’s wetlands and streams.

Thus, you have an opportunity to triple your gift! So, please be as generous as possible.

Give the options:

Now, I’m going to give you a couple of minutes to contemplate your gift. You have some giving options to consider:

- You can write a check tonight
- You can give via credit card
- You can make a pledge
- You can make a gift of appreciated stock

I’m going to distribute pledge forms along with pens and envelopes. Please deposit your gift in the baskets.

THE NIGHT OF THE HOUSE PARTY

Approximately 25 people attended the party — just the right number to fill the space of the home that had been offered. Here is how the evening went.

People started arriving around 6:30 and spent time mingling and eating and drinking. At about 7:15, we began the program. A board member from the host committee welcomed everyone, thanked the hosts, and said a few words about the importance of our work, then introduced the second board member on the committee, who spent about five minutes talking about the work, and success, of the Council in more detail. The Council's public affairs director then gave the main presentation on the urgent issue of the Bulldozer Amendment and the radio ad campaign for which we were raising funds. To give an example of how the funds would be used, she played a radio ad from a previous wetlands-themed campaign. This was a very effective moment. The second board member then wrapped up the presentation segment with an

impassioned plea for funds (see the sidebar for the key points we had brainstormed for the pitch).

After the pitch we handed out the pledge forms and envelopes and passed a basket around to collect them. The host committee said another quick round of thank yous.

We tallied up the contributions and pledges and announced that we had raised \$4,895 — a huge amount for a house party, made possible by the generous doubling of gifts by the hosts. Adding in the contributions from those not able to attend who sent gifts prior to the event, the total at that point came to \$5,300! One of the donors (who gave \$500) suggested that we have a similar party in a neighboring county — of course, we're planning on taking her up on that great suggestion!

FOLLOW UP

The Council sent thank you letters to all the donors, signed by the staff that attended. The board members also sent separate, hand-written thank you notes on Ohio Environmental Council cards.

When the radio ads aired, we sent a follow-up letter and e-mail to everyone who had attended the house party with information on where the ads had aired and included a web link to where they could listen to the ad. It was an opportunity to thank them again, show them how their gift had been spent, and emphasize that their contribution was an important investment in protecting Ohio's wetlands.

To top it all off — we won! The Bulldozer Amendment ran out of gas and was defeated. The radio ads were instrumental to this success. I called several of our top donors to let them know the good news — and to thank them for helping achieve this important victory. This was another easy way to interact with the donors and cultivate long-term relationships. Who doesn't love to hear good news?

LESSONS LEARNED

Overall, the house party was an extremely successful event. Next time we will give people the option of e-mailing RSVPs, and we'll give a phone number where someone is most apt to be able to answer questions after business hours.

This house party was a lot less work and a lot more profitable than others we had done. Asking guests to contribute at the event (rather than asking for a suggested donation prior to the event) we believe yielded much larger contributions. Having the pitch come from a volunteer board member rather than a paid staff member was powerful and persuasive. Plus, having two board members offer to match the gifts was icing on the cake! **GF**

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...or How to Avoid Undermining Your Fundraising Efforts

BY MARIANNE PHILBIN AND JO MOORE

Sometimes we think we’re getting things done, but we are simply spinning our wheels. Activity is often mistaken for progress, particularly by the people feverishly engaged in the activity. Where fundraising is concerned, certain kinds of activity can seem valuable and therefore appear to justify ongoing committee or staff attention. But looked at more closely, sometimes we find we’ve been sapping energy, resources, and goodwill.

Setting fundraising goals can be one such challenge. Here are two big wheel-spinners you’ll want to avoid.

1. SETTING, RE-SETTING – AND RE-SETTING – GOALS

Yes, we need a specific dollar goal. Yes, market realities sometimes change. But too many fundraising teams get caught in the trap of discussing and revising goals at almost every meeting, never quite getting to the point of moving on them.

The intentions are good: perhaps the development director, tuned in to the ever-changing donor and prospect landscape, has new information to share that might change the assumptions on which previous decisions were based. Perhaps the fundraising committee chair has started worrying that the goals set last meeting were too ambitious or not ambitious enough. Or perhaps the fundraising team simply includes one of those frustrating volunteers or staff members who just can’t let a good decision stand unquestioned.

Getting to the Root of the Problem

If your goal-setting practice feels like it’s stalling rather than steering your fundraising, take a step back and look more carefully at the reasons this might be happening.

Revisiting goals may have become a chronic pastime because staff and volunteers lack the confidence to move ahead. Perhaps they are uncomfortable with the language or the case they need to make in order to promote the organization; perhaps a new fundraising strategy needs to be piloted before larger-scale projections can be confidently made; perhaps your volunteers need stronger teammates or more training.

One strategy that can help the fundraising team move from discussion to action is to run through some role-plays, or to try out the “case statement” or best arguments for support on a real live donor who’s a member of the organization’s inner circle. Testing the case for support by say-

ing the words out loud can help volunteers find the really compelling parts of the case, hone talking points, and experience for themselves just how powerful the arguments actually are.

Perhaps the problem is that the goal you set for a particular strategy was based on nothing in the first place other than a hole you needed to plug. For example, you need to raise a total of \$100,000 and have a fairly realistic projection of bringing in \$80,000 from grants, so your individual donor goal gets set at \$20,000, regardless of who your donors have tended

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to be in the past and what you've ever raised in that category before.

Another sticking point is that many fundraising committees think or process far too much when projecting dollar amounts to solicit from individual donors, anguishing over whether or not this amount or that amount is the "right" amount to ask for from this particular person. Nine times out of ten, however, the difference between the dollar amounts being debated is not that great — \$250, for example, versus \$500 — and it just doesn't matter that much. The specific amount mentioned matters much less than simply getting out there and asking.

Moving into Action

An important consideration is to set goals that allow volunteers to experience success. Doing so may mean taking the work in smaller bites and reassuring fundraising volunteers that there is no shame in starting small. For example, you may need to raise \$75,000 from individual donors in order to support your overall plan, but this does not have to be tackled in one campaign. Consider a series of mini-campaigns, tackling ten or fifteen names over a six-week cycle, rather than 100 names over a longer period. Close off each mini-campaign and celebrate its success before moving on to the next.

Remember that you want to set goals that can be successfully reached. Consider goals that do not focus on money alone. For example, make it a habit to publicly acknowledge and "reward" volunteers and staff members for their fundraising activity ("Special thanks and congratulations to Sally for making three asks this month!"), not just the outcome of the activity. Raising money is the ultimate goal, but helping people to get there involves providing substantial support and encouragement along the way.

2. SETTING A GOAL "BEYOND" YOUR GOAL, OR HIDDEN GOALS

At the end of a committee meeting we recently attended at which the process of reviewing anticipated expenses and painstakingly constructing the revenue side of a new annual budget was finally completed, the fundraising chair looked at the final dollar amount and said, "But don't we want a lot more if we can get it?" You could feel the

energy fizzle out of the assembled group. It was as if all the hours just spent on planning had never occurred.

"We just set a goal, and it was an ambitious and well-reasoned goal," the poor Development Director thinks, "and now we're saying that we're setting the bar higher?"

Consider a series of mini-campaigns, tackling ten or fifteen names over a six-week cycle, rather than 100 names over a longer period.

Not only does this eleventh-hour question toss back into the air all the cards that should have been carefully laid on the table in a planning session, it makes it seem that the organization's overall approach is to see

how much it can raise and then make plans based on that amount.

To set one goal on paper but push the fundraising team to raise more can turn success into disappointment and undermine morale. "The board should see my work as good work if I help us raise the budget goal we set," one development director recently said to us. "If the executive director or the board is actually evaluating my performance against some other standard, that should be made clear to me."

Being casual or cavalier about fundraising goals can also reinforce the very sorts of myths and misperceptions

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about fundraising that you have probably been trying hard to lay to rest. It is not magic. It is not spontaneous.

It is not expense-free. A fundraising goal should be determined by careful planning and thoughtful projections, not by a moment of well-intentioned exuberance or panicked need.

Honest Planning

Fundraising is not an isolated activity that takes place in a vacuum. It is part and parcel of the expression of larger priorities and decision making at your organization. An organizational budget reflects the "logic" of the whole organization at a moment in time. Assuming the budget has been constructed logically, the fundraiser's job is to hit the goals in that budget. If organizationally you think you want or need more in this fiscal year, then budget for it, on both the revenue and expense side, and make specific plans to achieve it.

This kind of planning is part of conveying that yours is a mature organization, stable and thoughtful in every way. You respect people's time and effort. You make plans and you make progress. You are on target on both the program side and the resource side. In short, you plan

your work and you work your plan. This is the message your fundraising goal-setting should help to communicate.

Get in the habit of helping your organization to see the revenue side of a budget as being as “real” and as “strict” as the expense side. You wouldn’t set an expense budget and then say, “Great, but now let’s go out and actually spend more than this.” Similarly, it’s not a good idea to set the revenue side of the budget and then say, “Okay, but let’s really aim for a different outcome.” Not only is a budget the result of careful planning, but a budget is in fact a plan for how you’re going to operate (raising and spending) for the next year.

A budget guides your program, preserves your decisions, and ultimately protects your organization — and the mental health of your staff. If you write the budget and then ignore it, you’re not doing anyone any favors. If an expense item is set and staff are then told “try to spend less than this,” they are left unsure as to how much they can actually spend. If a fundraising goal is set and the team is then told, “try to raise more than this,” chances are they will get bogged down in planning and be less certain of how to proceed.

REACH FOR THE GOAL YOU SET

You can be responsive to unexpected opportunities as they arise, of course, if they are appropriate to your plans. There may be board members who will stretch to make

larger personal gifts than you anticipated; there may be events that are more successful than expected.

It can be motivating and exciting, of course, to exceed a goal, and nothing is more fun to announce after the blessed event has occurred. But this is quite different from announcing it in advance.

Raising the dollars your budget projects, after all, will require very specific allocations of time and resources. Raising a different amount might require something else. Fundraising involves building the apparatus that can raise the goal you set; to raise more might require a different set of actions: more investment, more time, more asks, more volunteers. Your capacity is part of the equation.

Does it take away potential excitement not to talk about fundraising in terms of “exceeding our goals?” No, because what’s new and exciting in your fundraising is not always about raising more. What’s worth celebrating may be that you are diversifying your revenue base, developing relationships with new donors, stabilizing your fundraising operation, bringing in support from new sources, laying the groundwork for new strategies. Or, simply hitting your goal. **GF**

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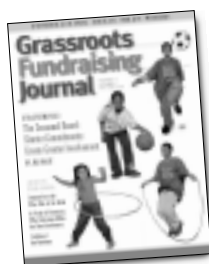
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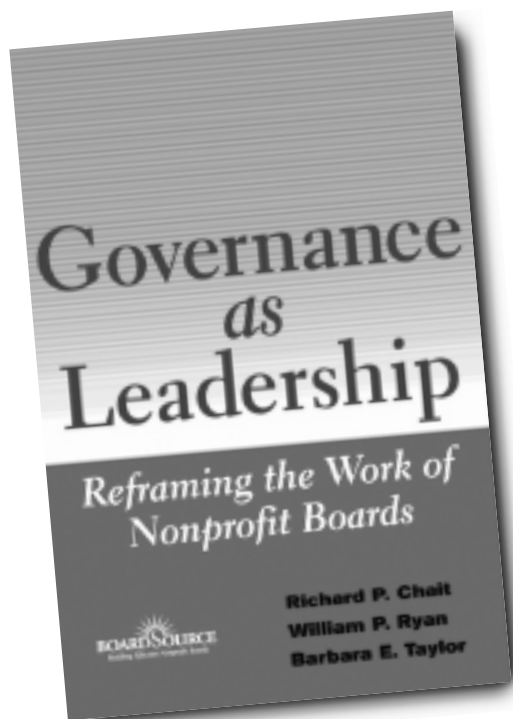


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BOOK REVIEW



Governance as Leadership: Reframing the Work of Nonprofit Boards

By Richard P. Chait, William P. Ryan and Barbara E. Taylor

\$35 / 224 pages / Hardcover / BoardSource, 2005

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Reviewed by Manami Kano

Extensive prescriptions have been written to cure what is ailing nonprofit boards, but the new and significant ways of thinking offered by *Governance as Leadership* make this book a worthwhile read for executive directors, board members, and consultants.

As a board member and consultant myself, I have sampled the good, bad, and ugly of these governing bodies. Whether the board was the de facto staff for a small, mainly volunteer organization or the gentle and somewhat clueless aunts and uncles of a staff-driven group, figuring out how to participate meaningfully with the organization with limited time and while developing a functioning partnership with the executive director have been ongoing challenges for me, as for most board members.

In this academic, yet accessible and practical book, the authors propose a different way of looking at the persistent problem of how boards can operate effectively. With the assumption that boards are a valuable component of nonprofits rather than a necessary evil, the book tackles the problem of board *purpose* rather than focusing solely on board *performance*.

Board purpose, they suggest, has come to a crisis as the result of several shifts over the years. One important shift has been the professionalization of nonprofit management. This professionalization has resulted in elevating the role and expectations of the executive director, who has moved from administrator to organizational leader

setting the group's vision and direction. Conversely, board members have less time to give to an organization; moreover, they are increasingly expected to function as technical managers, overseeing budgets, audits, facilities, personnel policies, program reviews, and the like.

"Nonprofits usually want a Noah's ark of professional experts," the authors write. "As a result, many boards resemble a diversified consulting firm with specialties in law, labor, finance, marketing, strategy, and human resources." With more governance occurring at the staff level, they say, "the real threat to nonprofit governance may not be that boards micromanage, but a board that microgoverns, attentive to a technical, managerial version of trusteeship while blind to governance as leadership."

In contrast, the authors advocate that boards reposition themselves as leaders and work in partnership with nonprofit managers. They identify three modes of governance that enable effective board leadership: fiduciary, strategic, and generative.

Fiduciary leadership has become synonymous with good governance: make sure resources are used effectively and prudently, prevent mission drift, and ensure board members act in the best interest of the organization. Required by law, this is an essential part of governing, yet it is not the only role of the board.

Strategic concerns have also become a common role for boards, as nonprofits have begun to think more like

their for-profit counterparts. External forces, such as competition from other groups, along with other economic and political pressures, have resulted in strategic plans becoming the sign of legitimacy and professionalism of nonprofit groups.

The authors argue, however, that the third mode — generative governance — while the least developed and employed of the three, is as essential to effective governance. This generative mode emphasizes developing a multiplicity of perspectives rather than technical expertise and empowering the board to do meaningful work involving “framing on the front end the problematic situations that most demand organizational attention and making sense of the organization’s experience.” Because generative opportunities are accompanied by high stakes and potential for conflict, this is essentially risky and messy territory that most executive directors and boards would rather avoid. But the authors suggest, it may hold the key not only to reinvigorating boards but to advancing organizational goals.

Seeing board operations in terms of these three modes is useful, as the framework gives us a common language to talk about both what’s working and what needs improvement. While the book is more of a theoretical discussion of a new framework for board governance than a handbook, some helpful tactics, such as for promoting robust dialogue, along with some diagnostic exercises are presented to help implement governance as leadership.

Too many of us in the nonprofit sector have come to believe that boards simply “don’t work,” so we think they must be managed and contained to do the least possible amount of damage to the organization. This line of reasoning concludes that because board members typically don’t have the time to think fully about the organization and feel compelled to leave critical decisions to the staff, or because board members often choose to retreat from the larger work of the board to pursue their own pet projects, boards are a burden that organizations must bear to keep

their nonprofit status. In both cases, the premise that boards are critical to the organization is absent.

Is it possible to bring the board back as a critical component for leadership in an organization? The authors argue that it is, and that perspective alone makes this book worth reading. **GF**

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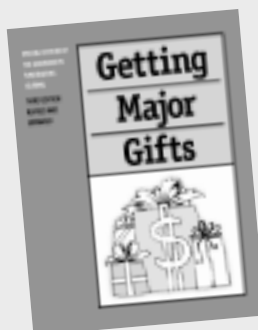
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