Contents

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On Our Cover • PROJECT EXPLORATION, A SCIENCE EDUCATION NONPROFIT, WORKS TO MAKE SCIENCE ACCESSIBLE TO THE PUBLIC — ESPECIALLY YOUTH OF COLOR AND GIRLS — THROUGH PERSONALIZED EXPERIENCES WITH SCIENCE AND SCIENTISTS. PICTURED, MARCO AND SHUREICE ENGAGE IN HANDS-ON PALEONTOLOGY FIELDWORK AS PART OF A PROJECT EXPLORATION YOUTH PROGRAM. PROJECT EXPLORATION RAISES HALF OF ITS $1.8M BUDGET FROM EARNED-REVENUE STRATEGIES, INCLUDING RENTING EXHIBITS AND LICENSING IMAGES SUCH AS THIS ONE. WWW.PROJECTEXPLORATION.ORG

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LETTER FROM THE ASSOCIATE PUBLISHER

JENNIFER EMIKO BOYDEN

My extended family has a huge gathering each New Year's Day with most of my mom's 32 first cousins and their families. Feasting on traditional (and nontraditional) Japanese dishes, watching the college bowl games, and visiting with each other is an annual affirmation of the importance of family — no matter how you define it — and the network of support it provides.

Here at the *Grassroots Fundraising Journal* our own family is growing. After a couple of years of informal conversations, exploratory meetings, and more serious negotiations, the *Grassroots Fundraising Journal* is entering into a partnership with the Grassroots Institute for Fundraising Training (GIFT). For the past ten years, GIFT has been increasing the number of skilled fundraisers of color through a six-month-long internship program and has helped build the grassroots fundraising programs of social justice organizations around the country. We are excited about the possibility of eventually merging with GIFT and look forward to our increased capacity to support the work of nonprofits.

Experiences like New Year's Day with my family remind me of how good it feels to be a part of a community, and the more I learn and think about grassroots fundraising, the more I realize how fundamentally it is about building relationships, community, and ultimately social justice movements.

The articles in this issue of the *Journal* illustrate three different elements of grassroots fundraising and how they build community. Deborah Agre of the Middle East Children's Alliance gives us an in-depth look at how newsletters build relationships with donors by providing important information about the work, and she discusses the ideal frequency, length and content of the newsletter itself.

Next, Kim Klein walks us through the process of establishing a successful legacy giving program, emphasizing the importance of communicating with donors about the essential nature of our work and how it is funded, and the need to break through the taboo of talking about death and money — all steps in the process of deepening our relationships with our community of donors.

We wrap up the issue with a piece by fundraising and organizational development consultant Nancy Otto on thank you notes. Nancy gives us guidelines for what to say in thank you letters and when to send them, and she describes how making the time to acknowledge each gift builds a sense of caring and community with our donors. Neglecting to thank our donors for each gift and failing to communicate with them on a regular basis throughout the year hinders our efforts to build relationships, communities and a viable social justice movement.

We hope you enjoy reading this issue of the *Grassroots Fundraising Journal* and wish you the very best in your fundraising (and community building) efforts in the upcoming year!

Newsletters:
AN ESSENTIAL PART OF THE Fundraising MIX

BY DEBORAH AGRE

It was already September and the July newsletter still wasn't done. I was especially concerned for two reasons: We had two events coming up that we wanted to promote in the newsletter, and we had a lot of new donors as a result of the recent humanitarian crises in the Middle East who hadn't received any information from us except a short thank-you letter.

I decided to get a newsletter out fast. To make it easier, I reduced the number of pages from twelve to eight and decided to focus the content on our recent humanitarian aid efforts, with an autobiographical piece by our partner in Gaza who was carrying out much of the work. Our upcoming events were announced in a few places, and an article by our featured speaker was included to generate interest in what he had to say. The design showed off our new logo and was printed in four colors for not much additional cost. I also included a page with basic information about the Middle East Children's Alliance, both for the benefit of new supporters and because the newsletter had to serve as our informational piece for event attendees.

In many ways this issue was a departure from the kind of newsletters we had been doing. It was shorter, more time-sensitive, and more focused. Nonetheless, it had all the elements I consider essential for a newsletter to be an effective part of our fundraising program.

First-person accounts by people in the field are very compelling.


MECA NEWS

MIDDLE EAST CHILDREN'S ALLIANCE

Fall 2006

A child in Gaza with cooking oil and food staples. In the spring, I worked with local youth to distribute 1,000 food parcels donated by MECA.

Hello ... I am still here ...from Gaza with love

Dr. Mona Elfarra,
MECA Director of Gaza Projects

I am a mother. I have 3 children, 2 girls and one boy. My son is Mohammed who is studying environmental sciences in the UK. My eldest daughter, Basma, is studying in Gaza, Alazhar University. She is married and living 700 meters away. My youngest daughter, Sondos, is 13. I am a physician by training and a community activist. I used to work with the Union of Health Work Committees, and now I'm the health development consultant for Al-Awda Hospital (Jabalia refugee camp). I was one of the founders of this hospital in 1997, as well as several community based programs that aim to improve health quality and link health services with cultural and recreation services, particularly in the most needy areas in Gaza. I am also vice president of the Red Crescent Society in the Gaza Strip.

I love Gaza, and would not replace it for any part of the world. It is my home and I have a cause to fight for here. We all struggle on different levels to achieve our national goals: freedom and an independent Palestinian state.

I was born and brought up in Khan Yunis town, southern Gaza Strip. I love the countryside, which has been largely destroyed over the years by the Israeli occupation. My late father's citrus

Continued on page 5

People almost always read photo captions, so put something in that reinforces their giving.

Above: First-graders holding their new backpacks stocked with cherished school supplies provided by people who give $50 or more each month to MECA's Dheisheh Children's Fund. The Fund also supports the Ibdaa kindergarten and assists families facing severe medical or financial crises.

NEWSLETTERS BUILD RELATIONSHIPS

The relationship between an organization and its supporters is essentially a long-distance one. Even local organizations communicate with their donors primarily through the mail. While websites and e-mail communications are important, most donors still like to get a paper newsletter. Many people do not like to read things on a computer screen, and you just can't reach everyone via e-mail. That said, you should also post your newsletter on your website and send a version of it through e-mail. (Though, for the privacy of your donors, I would exclude lists of donor names from those more public places.)

A newsletter serves several purposes in a fundraising program. First, it's an important benefit people get in exchange for their financial support. Even if they don't actually read it, it gives them something tangible that reinforces your organization's existence and efforts. It gives them another opportunity to give, shows them how their money is being used, and recognizes their support. Newsletter articles — and photos — can deepen a donor's commitment by expanding their understanding of the issues your group addresses and by introducing them to the leaders of the organization and the people the organization serves. People who attend an event or sign a mailing list often give their first gift in response to getting a newsletter.

Ideally, a newsletter should go out at least four times a year in order for supporters to perceive it as a regular publication and a benefit of membership (even if you're not technically a member organization). For some very small organizations, though, this is just not possible, and producing a newsletter twice a year may be all you can manage. If you're short on time or funds, four-page newsletters are fine; supplementing your newsletter with an occasional one- or two-page memo from the director or board chair — especially to major donors — is great.

Although a newsletter is not a direct appeal for funds, it is a key part of any fundraising program and shares many features of fundraising letters. The articles should be short, the writing simple. It should be pleasing to look at, and people should be able to flip through and see things that catch their attention, such as photos with captions, pull-quotes, headlines, and subheads. I get a monthly newsletter with good articles from an organization I care about, but the articles are long and there are no photos. The type is small and in a sans serif font. (OK, this may seem picky, but a serif font is just easier to read.) Most months, I put it aside to read later, and then I rarely do.

People are generally busy when they pick up their mail and get their first look at your newsletter. They need to see right away that there are a few things of interest to them and that it won't demand an enormous amount of their time and concentration.

WHAT TO PUT IN YOUR NEWSLETTER

Newsletters should have a variety of articles and announcements of different lengths. Here are a few things that should be in every newsletter:

• ***A donation form.*** The text of this form can be very general, such as reinforcing a recent fundraising letter or ongoing campaign, or it can be a pitch for a monthly giving program.

• ***A reply envelope.*** A "remit" or "wallet-style" envelope folded or stapled into the newsletter is best, as it allows space for the fundraising message and for the

Profiles of an organization's leaders inspire and motivate donors.

SPOTLIGHT

Loretta Ross

Three Decades of Advocating for the Health and Rights of Women of Color

By Rebecca Farmer

Loretta Ross is one of many activists who came to her work by way of injustices she faced. She's also a big believer in working together to create social change—and reaching out, across and within movements, to achieve that end. As one of the members of BCA's new National Advisory Council (see page 8 for more information), she will help connect the breast cancer movement to other areas of women's health and social justice.

Currently, Loretta is the national coordinator of SisterSong Women of Color Reproductive Health Collective (www.sistersong.net), but her activism spans decades. SisterSong was formed in 1997 by 16 organizations to fulfill a need for a national network that would organize women of color in the reproductive rights movement. The collective also was founded to educate women of color and policy makers on reproductive and sexual health and rights, and to work toward acquiring access to health services, information, and resources that are culturally and linguistically appropriate. In less than ten years, the collective has grown to encompass 80 organizations. Originally comprising solely women of color organizations, membership was opened in 2003 to all individuals and organizations that work on behalf of people of color.

"SisterSong became a home for everybody," Loretta says. In particular, it became a home for radical progressives in the movement who were dissatisfied with simply critiquing omission of marginalized groups from the system rather than critiquing the overall systems of oppression. Breast Cancer Action is a new member of the collective.

Loretta Ross is a member of BCA's new National Advisory Council!

In 1974 Loretta first became active in a tenants' movement in Washington, D.C., and worked to help pass the city's first rent control policy. It was during this work that she met Nkenge Toure, then the director of the DC Rape Crisis Center. A rape survivor herself, Loretta became the center's director in 1979. "That was my first feminist work," she says.

Prior to that job, at age 23, Loretta was involuntarily sterilized by a malfunctioning IUD and had to have a full hysterectomy. "I've been working in the women's movement pretty much ever since then," she says. "It sounds like a horror, but it opened up the rest of my life." The sterilization and an earlier struggle against parental consent laws to obtain an abortion were her personal introductions to the world of reproductive rights. Her experiences in that field and others have driven the work she has done over the past 30 years.

continued on page 4

donor's name and address. Although this information is also on the donation form in the newsletter, some people will hang on to the envelope after they're done with the newsletter, and vice versa.

• ***A message*** from the director, board chair, founder, or anyone who's perceived as a leader of your organization. This brief essay should capture the person's voice and be more like a friendly personal letter, rather than an article.

• ***Photos with captions.*** Here's where you can show off your recent accomplishments. People almost always read photo captions (and often don't read anything else), so try to put something in the captions that reinforce the donor's giving.

Other things you may want to include:

• ***A list of donors*** — particularly major donors — who've given in the period since the last newsletter.

• ***A reprint of an article*** by someone closely associated with your organization, if it's not too long and technical. Also, announcements of public appearances or publications by people in your group or people who are considered leaders in the area your organization addresses.

• ***A question & answer or advice column.*** Such a column is good if your organization deals with legal, health, or consumer matters that directly affect your supporters. The Breast Cancer Fund, an organization in San Francisco that addresses the environmental links to breast cancer, includes in its newsletter a regular feature with a question from a reader and an answer from an environmental health expert about reducing personal risk.

• ***Personal stories.*** If you're a direct service organization, stories by or about clients or "people in the field" are great.

• ***Event announcements.*** Ours always go on the back page, below the address panel, so it's the first thing people see when they pick up the newsletter — even before they open it.

• ***Stories about lesser-known aspects of your work.*** Several years ago, I gave to a local children's organization because a child I know was helped by their well-known program for kids with very sick parents. Later, I learned through their newsletter that the organization did other important work with kids in my community; now I'm an even more committed (and generous) supporter.

• ***Profile of a volunteer, donor, or board member.*** Getting to know people inside the organization gives readers a more personal sense of your group.

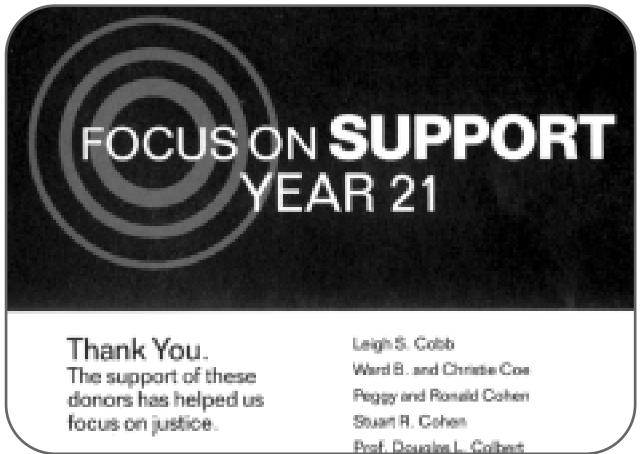
• ***Information about leaving money in your will,*** and profiles of supporters who have done so.

THREE LESSONS

So far, my recent "seat-of the-pants" newsletter is generating the same size and amount of donations as other newsletters have in the past. So, I've learned a few lessons. The main lesson: just get the newsletter out. Second, shorter may be better — or at least as good. No more twelve-pagers from us. Third: start working on the next newsletter as soon as the current one goes in the mail. This habit will help keep you on schedule to get a newsletter out each quarter. Keep an eye out for good photos and story ideas all the time.

By keeping in mind the essential and desired components of a newsletter and its place in your program's fundraising, it should be less of a chore to "think up" what should go in the next one. That way, your chances of actually getting out a newsletter each quarter grow larger — along with your fundraising success. GFJ

DEBORAH AGRE IS DEVELOPMENT DIRECTOR OF THE MIDDLE EAST CHILDREN'S ALLIANCE. SHE CAN BE REACHED AT DEBORAH@MECAFORPEACE.ORG



A newsletter is a good vehicle for publicly appreciating your donors.

Considering LEGACY GIVING

BY KIM KLEIN

Legacy giving (also called planned giving) refers to gifts that donors plan to be distributed from their estate after their death. These gifts are generally made by long-time, loyal donors who believe in the need of the group to exist after their own life is over, and more important, who have faith that the organization will continue to do a good job for years and years to come. These are not necessarily major donors; many bequests come from donors who have given small amounts to an organization for a long time.

When I look around at board meetings I attend, I often reflect that in fifty years, people who aren't even born yet will be running the organization. I will be deceased. What would I need to know about this organization to trust that it will continue to attract people to its board and staff who will continue to do good and needed work? Whatever information that creates that confidence is fundamental to getting donors to consider legacy gifts.

Most groups use legacy gifts to build endowments. An endowment is a permanently restricted fund invested to generate interest. The principal, or corpus, is never spent; it is added to as more legacy gifts come in. The interest income can be used as the organization wishes, if the donor hasn't created terms restricting how the gift can be used. Interest income is usually allocated to general operating costs, as these are the most difficult to raise money for.

GETTING READY FOR A LEGACY GIVING PROGRAM

Many organizations think that getting ready for a legacy giving program involves going to seminars and memorizing complicated financial planning language, then identifying the organization's oldest donors, telling them what you have learned, and watching them sign on the dotted line. In fact, before anyone in the organization begins the process of learning the many different ways to word a bequest, a number of things have to be in place.

First, it is critical that your organization discusses and agrees on the need to exist far into the future and comes to grips with what that means for your overall mission. Second, in addition to deciding how far into the future your group needs to exist, you need to look at whether people trust you to do your work now and understand your need for funds. Does your group have a good reputation — not just for work accomplished, but for stewarding resources, handling money responsibly, and raising money with integrity? Although many grassroots organizations could answer yes to all these questions, they may be surprised at the extent to which their donors have no sense of how their group deals with money. If you don't put out an annual financial report, if you don't publish the names of your donors from time to time, and if you don't regularly talk about how you raise money, your donors may have never thought much about your financial needs. You can start a legacy giving program without people being aware of how your organization raises and spends money, but it will not go very far until that information is more commonly known.

You need a donor base that includes people who have given your organization money for several years and who think of your organization as one they will support as long as they can.

I have known donors who had a favorite grassroots organization to which they made significant donations and for which they volunteered, only to make legacy gifts to their university or another much larger institution. They made this decision because they could not be sure the grassroots group would last long enough to benefit from a bequest or because they did not trust that the organization could manage an endowment. This is a vicious circle, and people in fundraising roles in small organizations need to break it by learning as much as they can about legacy giving and convincing some of their bolder donors to take the leap. Once a few do it, others will follow.

Third, and closely related to the previous point, you need a donor base that includes people who have given your organization money for several years and who think of your organization as one they will support as long as they can. Many groups need to develop their donor base — both in numbers and in donor loyalty — before they begin a legacy giving program.

The first step in a legacy giving program is motivating donors to make a will. The second step will then be to encourage them to name your organization as one of their beneficiaries.

If one or more of these elements are not in place, do what is needed to build that foundation, then come back to legacy giving in a year or two. (Go to www.grassrootsfundraising.org for articles that will help you build that foundation.)

PREPARING TO TALK ABOUT LEGACY GIVING

Many organizations that may be ready to start a legacy giving program hesitate to do so because of the almost universal taboo about talking about death. Not only do people feel awkward talking to anyone about their death, they feel doubly awkward raising the subjects of money and death at same time. Such a discussion may seem not only in bad taste but intrusive.

However, it is important to remember that in the United States bequests, which are the most common form of legacy giving, account for nearly 10 percent of all the money given to nonprofits — as much as is given in most years by foundations and always more than the amount given by corporations. If you want people to think of your organization when they are drawing up their estate plans, you will have to ask them in one way or another.

When you ask someone for a bequest you are not asking them to die — as inevitable as that will be for us all. You are instead making a statement about your organization and its need, complimenting the donor on their loyalty and commitment to your cause, and giving them another opportunity to act on that commitment.

THE IMPORTANCE OF A WILL

The terms of almost all legacy gifts, even very complicated ones, are laid out in a will. To give you a sense of the market, more than half of all people die without a will. Of people who make a will, only about 7 percent include a bequest. Even among very wealthy people — for whom a bequest would lower estate tax for their heirs — recent statistics show that only 18 percent of estates included bequests.

Everyone should have a will because no one knows when they are going to die and because everything you own during your lifetime you also own after your death. You have the authority to direct what happens to your property after you have died, but if you choose not to make a will the state will make that direction for you. Introducing your donors to legacy giving is thus a service to them because it causes them to think about making or updating their wills. Your nonprofit may get some money as a result, but the main service is that making a will protects the donor's family and other interests.

If a person dies without a will (called "dying intestate"), the law specifies who will receive the estate, depending on surviving family members: spouse, child, parent, brothers and sisters, nieces and nephews.

MOTIVATING DONORS TO MAKE A WILL

In most grassroots organizations, the first step in a legacy giving program is motivating donors to make a will. The second step will then be to encourage them to name the organization as one of their beneficiaries. A few case studies about what happens to people who don't have wills motivates most donors to create one (see sidebar on page 10).

Most people underestimate the worth of their estate and overestimate the time or cost involved in setting up a will. In addition to the distribution of property, a will can carry wishes about how the person wants to be buried, whom they want looking after children or pets, and any other legal or other obligations the deceased wishes heirs to assume.

A warning before proceeding further: Nonprofits cannot be involved in the creation of someone's will. They can encourage people to create a will, offer workshops about wills led by attorneys or estate planners, and discuss what they know about wills with donors and in written materials, but they must not get involved in giving legal advice or in helping people to write their wills. The only advice anyone in a nonprofit should give current or potential donors is that the donor consult their own attorney or financial planner. The reason for these cautions is to avoid being accused of "exerting undue influence," thus opening the way to legal challenge of a will.

THE BEQUEST

The simplest form of legacy giving to a nonprofit — and the most common — is the bequest. A person notes in their will what property they wish your organization to have: cash, stocks, bonds, art — anything of value. People who already have wills and don't want to change them substantially can add a "codicil" or amendment to their will to specify gifts to your organization.

One of the most famous and earliest bequests was given by Ben Franklin in 1790. He left the equivalent of $4,000 (in today's dollars) to be divided between the people of the state of Pennsylvania (76 percent) and the city of Philadelphia (24 percent) on the condition that it not be touched for two hundred years. (Franklin had great faith in the future of his state and city!) In 1990, when the two hundred years were up, Franklin's bequest was worth $2.3 million.

Although nonprofits cannot direct people how to word their wills, they can, in their newsletter or other printed material, let donors know the appropriate wording for a bequest a donor may wish to leave to your group.

How Someone Makes a Bequest

Anyone can make a bequest as long as they are of sound mind when they make their will and they own something they can't take with them. Bequests are not only for wealthy people — if all someone owns is a late-model Ford, they can leave that car to a nonprofit, which can then keep whatever amount they can sell it for.

All bequests are revocable during the life of the donor — a will can be changed any number of times. Your organization may be included in one will and left out of a later version. Thus, unrealized bequests (bequests promised to you by donors who are still alive) cannot ethically be counted toward a fundraising goal.

Although nonprofits cannot direct people how to word their wills, they can, in their newsletter or other printed material, let donors know the appropriate wording for a bequest a donor may wish to leave to your group. In addition to the wording for a general bequest described here, you can find wording for other types of bequests on our website (www.grassrootsfundraising.org).

The general bequest is the simplest bequest, whereby a donor gives a stated amount to the nonprofit group without attaching any conditions. The bequest reads as follows:

> I give and bequeath to *(exact legal name and address of organization)* the sum of $_____ *(or a specific piece of property)* to be used as the board of directors directs.

To be absolutely certain there is no confusion about which nonprofit organization the donor meant, it is a good idea to include the address of the group.

The Importance of a Will: THREE STORIES

Names have been changed, but the following stories are otherwise true.

Mary Springhill, age fifty, died of breast cancer. She had no children and her parents were deceased. She had separated three years earlier from her abusive husband but they were not divorced. Mary's estate, including a house, a new car, and some savings, was worth a little more than $400,000. Mary had never gotten around to writing a will; during the time she had cancer, she was too sick to think about preparing one. Now, as the surviving spouse and sole heir, her husband is the beneficiary of her entire estate.

Alice Williams, age thirty-three, was killed in a car accident. She and her parents had clashed about her pro-choice activism as well as her progressive attitude toward many issues, and their relationship was very strained. At twenty-one, Alice had inherited $100,000 from an aunt. She had saved the money, using the interest it generated to augment her salary. Without a spouse or children, Alice's estate of $100,000 went to her parents. Alice may not have objected; however, to counter what they saw as Alice's "evil attitudes," her parents gave it all to a variety of anti-abortion organizations.

Fay and Marianna were lovers for five years, living in a home Fay had bought before they got together. Fay also had a comfortable inheritance from her father. They had planned to add Marianna's name to the title of the house and create wills, but before they got around to it, Fay was struck and killed by a drunk driver while walking across the street. Because Fay had no will, her mother became her legal heir. Having never approved of Fay's relationship with Marianna, Fay's mother evicted Marianna from her house and told her she would receive nothing from Fay's estate.

GIFTS FROM INSURANCE AND RETIREMENT FUNDS

Any time a person owns an asset, such as an insurance policy or investment in a retirement fund, they will be asked to name a beneficiary. That beneficiary can be a nonprofit organization. Or they can name an heir and then a nonprofit in the case that the heir dies first. Here are a couple of common examples.

Existing Life Insurance Policies

People generally buy life insurance to protect their survivors if sufficient assets have not been accumulated. The value of the life insurance policy may cover mortgage debt or protect a business. As a person gets older, they may not need that protection and can change the beneficiary of their insurance to a charity of their choice. With certain kinds of policies, the older the life insurance policy, the more cash value it has built up. Sometimes people realize that they don't need the policy any more, and they donate its value during the policyholder's lifetime (this, of course, is not as much money as the policy would pay as a death benefit). The Life Insurance Fact Book (a real page-turner) estimates that there are some 400 million life insurance policies in existence in the United States.

Once a year, send a mailing specifically focused on wills either to your whole donor list or to donors who have given for three or more years in a row.

Buying Life Insurance to Fund a Gift

For people wanting to make a gift to an organization that is far greater than they imagine they would ever be able to give from accumulated assets, buying a life insurance policy and making the charity a beneficiary may be a way to go. The premiums on such a policy may be tax deductible.

From an organizational viewpoint, this kind of insurance is problematic because it means the donor is paying out money to help your organization, but you will not see the results of this money until the death of the donor, perhaps far in the future. If the donor stops paying his or her premiums, the nonprofit has neither the insurance nor the donor.

IRAs or Other Retirement Plans

Most Americans are eligible to participate in some kind of tax-deferred retirement plan. You can encourage your donors to make your organization the primary, secondary, or final beneficiary of their plan or to name your organization as a recipient of a percentage of the proceeds. This money may come to you if the person dies before retirement or before they have used all the money in the plan.

OTHER STRATEGIES

The types of legacy giving I have described are the vast majority of planned gifts and will keep the average small nonprofit quite busy.

Beyond bequests, there are other legacy giving strategies, some of which can benefit donors during their lifetime by paying dividends on money put in trust for the nonprofit after the donor's death. Some organizations have had good luck working with their local community foundation to hold and manage trusts such as these and related types of funds. Since community foundations are set up to handle complicated giving arrangements, they have the language and the knowledge of how to do so. A foundation may also impart to a donor a sense of solidity and stability that reassures them that their investment will be well managed. Your organization receives the interest, just as you would if you were managing the asset, but without any of the headache.

INTRODUCING YOUR LEGACY GIVING PROGRAM

The best way to introduce a legacy giving program is also the easiest and most low-key: use letters, newsletters, and your website. In them, discuss your endowment and your vision for the future, and ask donors to think of you when they are making their estate plans. Then add a description of some of the kinds of bequests and an invitation to make your organization a beneficiary of a donor's will.

Start with the newsletter. Once or twice a year, include an article that focuses on the need for your organization to exist for a long time and therefore to have an endowment, and on the need for donors to have a will that expresses their commitments. Use real-life stories and give people examples of language they can use to create a codicil (amendment) to their current will.

Once a year, send a mailing specifically focused on wills either to your whole donor list or to donors who have given for three or more years in a row. You may wish to send a brochure explaining bequests with the mailing. Many planned giving professionals will provide you with a generic brochure for a small fee, which you can customize for your own organization (check the National Committee on Planned Giving — www.ncpg.org — for names of local professionals).

Many people are happy to answer questionnaires, so one way to introduce your legacy giving program is to include a questionnaire in a mailing or newsletter, as in the following example:

Reviewing Your Plans

- Do you have a will? . . . . ☐ YES ☐ NO
- If the answer is no, would you like more information about how to create one? . . . . ☐ YES ☐ NO
- Have you reviewed your will in the last three years? . . . . ☐ YES ☐ NO
- Have you experienced significant changes since you last reviewed your will (such as moved to another state, had a child, bought a house)? . . . . ☐ YES ☐ NO
- Have you included the organization you care about in your will? . . . . ☐ YES ☐ NO

Follow the questionnaire with the article in your newsletter described above or with a letter giving some of the answers to commonly asked questions about preparing wills and leaving money to charity. In the article or the letter, offer to meet with anyone who would like to discuss your organization's need for an endowment and how they might help.

In every newsletter and on your website, include a notice (like a classified ad) that your organization is receiving bequests and ask people making up their wills to remember you. Here is sample language for such ads:

> As you are making out your will, remember us with a bequest. Our full legal name and address are __________. For more information about bequest language, call or write: phone number, postal and e-mail addresses.

Or:

> If you have provided for *(name of your group)* in your estate plans, please let us know. If not, please let us show you how you can. Call or write: *(group's name and addresses)*.

Givers can also be reminded that they can name your organization as the first, second, or final beneficiary for part or all of the proceeds from IRAs, insurance policies, wills, or any other estate-planning documents.

Present this information frequently and people will begin to notice. Once they begin to notice, they will remember your organization when they are making out their will.

Create a Legacy Giving Mailing List

As you do more mailings about legacy giving and as people contact you for more information, you will develop a list of people who have identified themselves as wanting information about legacy giving. This list will include some serious prospects who may consider giving a legacy gift as well as people doing fundraising for other groups who want to see your material and people who love to get mail and write away for everything. You will have to sort out the serious prospects from the others in order to focus any personal attention you want to give to genuine prospects.

People interested in legacy giving can also be encouraged to sign up for information sent by e-mail. Any e-mail notices you develop should also be posted on your website and reached through an icon, "Making a Bequest" or "Ensuring Our Future." Look at the websites of large organizations to get ideas for how to promote legacy giving using the Web.

Many organizations create a "heritage society" — a group of people who have included your organization in their will. These people get some special mailings from time to time, some of which can describe your organization's legacy giving options in more detail, using examples and stories. They can be invited to receptions or lectures designed for them.

Hold a Seminar

A good community service that can also generate some legacy gifts is a seminar on estate planning. Invite people who have indicated an interest in legacy giving and announce your seminar to the broader community, if you like. Have an estate planner there and plenty of materials both about your group and about estate planning strategies. If you can, have someone there who will discuss how they included your organization in their estate plans.

The purpose of the seminar is to help people think through what they are going to do with their estates, so you don't want to spend a lot of time talking about your organization. However, you will need to mention yourselves a few times to drive the point home that if a person includes a charity in their will, you hope it will be yours.

A seminar lets you meet people, making follow-up easier. One follow-up technique is for your group to help form groups of people who want to discuss estate planning or legacy giving options with the help of an expert. Each month or so, your group provides an expert for these prospects to meet with who presents one topic in depth. (The group can also discuss related personal issues, such as when children should have access to their inheritance, the kindest thing to do with pets at the death of an owner, living wills, and so on.)

Many groups have found success in cosponsoring seminars such as those described above. More people attend and it is clear that no one charity is being emphasized.

A MUTUALLY BENEFICIAL GIFT

Once you are able to move past your anxiety and awkwardness about talking about legacy giving, you will see that a legacy gift is probably the most mutually beneficial gift a donor can make. In any gift, the organization benefits from the donation and the donor benefits by knowing that work he or she believes needs to be done will continue. The bigger the gift, the more assurance the donor needs to have that this will be the case. An organization expresses its gratitude to these donors for moving the work forward through thank you notes, special events, and other kinds of attention. With a legacy gift, the donor may actually be thanked with income earned as well as taxes lowered.

A gift given through a donor's estate is the final expression of commitment from a donor to an organization and the most profound opportunity the organization offers the donor to help. It is the ultimate exchange. It does not and cannot take place outside of a relationship that the person has with the cause and the mission of the organization.

An organization that wants a working legacy giving program will have in place everything that a working fundraising program needs: a desire to work with donors, the capacity to keep meticulous records, people willing to ask, plans and goals for the future, and a belief in the enduring value of the work. GFJ

KIM KLEIN IS CO-FOUNDER OF THE *GRASSROOTS FUNDRAISING JOURNAL*. THIS ARTICLE WAS ADAPTED FROM HER RECENTLY UPDATED BOOK, *FUNDRAISING FOR SOCIAL CHANGE, 5TH EDITION*.

Mom was right…

Write that thank you note!

BY NANCY OTTO

I have many memories from growing up of my mother standing over me, not letting me go out to play until I had written thank you notes to everyone who had sent me a gift for my birthday or the holidays. At the time, I could care less what effect these notes had on my relatives and parents' friends. I just wanted to get them over with. But now I know my mother taught me a valuable lesson. Taking the time to thank someone with a thoughtful and sincere thank you creates a strong sense of relationship and caring between the giver and recipient, or in the case of nonprofits, between the donor and the organization.

For nonprofit organizations, sending a thank you note to a donor, no matter what the size of the gift, is imperative. In our fast-paced society, when someone takes the time to read or scan an organization's fundraising letters, pull out a check book, find a pen, put a stamp on the envelope, and set it out for the mail delivery, or log on to the computer and find the group's website to make an online donation, they are making a notable effort.

And then there is the monetary gift itself. For many donors, the decision to give to an organization reflects either an immediate positive gut reaction to the work of the group or the people involved, or a more thoughtful, considered approach about what types of issues they want to affect and which organizations they feel are poised to make the most difference. Either way, if your organization is the beneficiary, it is because you have succeeded in moving their hearts and their minds. Your next move in response to their gift is key to whether they stay emotionally connected to the organization's work.

SEND IT SOON

Your organization should have systems in place to send out a thank you letter ideally within three days of receiving a gift. You need to know before the gifts start coming in who is going to write the letter, who is going to sign it, and what the letter should cover. The letter does not have to be long — it simply needs to acknowledge the amount of the gift, why it is particularly helpful at this time, the amount that is tax-deductible by law, and any reminders about upcoming opportunities for the donor to connect with the organization. Here's an example:

> Dear ____________ ,
>
> Thank you so much for your gift of $100. Your gift comes at a crucial time, as we are about to launch our new project to provide support services to homeless youth.
>
> We hope you can join us at our kick-off event next month on the 8th at 6:00 PM. We will send you more information about the details as it gets closer.
>
> Again, thank you so much! We will be in touch.
>
> P.S. For IRS purposes, no goods or services were exchanged for your donation, so the full amount is tax-deductible (tax ID #).

The staff or volunteer who opens the mail should know that gifts from donors need to be given urgent attention. They need to get those gifts to the appropriate person who can then write the thank you letter right away. At the very least, observe the fundraising maxim, "Thank before you bank," and send out a thank you letter before depositing the gift. Once the thank you letter is sent, be sure to have a way to record when it was sent in the donor's record.

FORM OR HANDWRITTEN?

The thank you letter can be computer generated, although handwritten letters touch people much more deeply and leave a longer-lasting impression. If yours is a small nonprofit just starting out with a small group of donors, handwritten thank you letters are worth the investment in time to write them.

If you are a more established group, with hundreds or thousands of donors responding to an appeal, generating handwritten letters to each one of them would be quite labor intensive. But you could write handwritten letters to a select group of major donors on your list, and you could also add a special handwritten note on a computer-generated thank you letter to all donors.

Remember, what you decide to do regarding thanking a donor will have a ripple effect later on when you come to ask them to give again. If you have touched your donors emotionally with a personal thank you note, you will have an easier time approaching them again for their next gifts.

PUT YOURSELF INTO IT

As you write these letters or notes, spend time being thoughtful. Don't attempt to write them all in one sitting. Try to intersperse them throughout your day so you can approach each one with clarity and focus.

Try to personalize the notes on computer-generated letters as much as possible — don't just write "Thanks!" or "You're the best!" — these throwaway comments leave the donor feeling that you are not really focusing on their individual gift. Try to refer to anything you might know about the donor that would help the donor realize you are really thinking about them as you are writing to them. "Thank you so much for your gift — especially during this difficult period for you and your family. Our thoughts are with you." Or, "You have been such a loyal donor. Thank you so much for your continued support of our work. You are crucial to our ongoing success." Again, if you are going to take the time to send a thank you, you might as well spend a minute more to personalize it so that the letter really is meaningful to the donor.

Many organizations also recruit their board of directors and volunteer solicitors to call donors to thank them by phone or to write a handwritten note.

In addition to sending the donor a thank you letter, many organizations also recruit their board of directors and volunteer solicitors to call donors to thank them by phone or to write a handwritten note. You can do this by choosing several times throughout your fundraising campaign to hold phone banks for board members and volunteers to be in one place calling donors to thank them. You can also create a system whereby you alert your board members and volunteer solicitors every time a donation comes in so that the appropriate person can call or send a letter right away.

However you do it, having board members and volunteer solicitors call donors to thank them for their gifts in addition to sending them a letter is impressive to donors. This coordinated effort tells the donor that the group is well-organized and thoughtful — building confidence in their investment in your organization.

These calls also allow for board members and volunteer solicitors to possibly get to know the donor better and start establishing a relationship with them. For organizations whose board members are resistant to soliciting donors by phone, having them make thank you calls first is an effective way for them to get used to the idea of talking to donors and to build confidence toward soliciting them the next time.

YOU CAN NEVER BE TOO THANKFUL

You can never acknowledge your donors too much. As another form of appreciation, many organizations list their donors by name under different gift-range sizes in their newsletters, annual reports, event programs, and on their website. Be sure to give your donors the option of remaining anonymous.

Most donors look for their names in these public lists — so be sure your records are as accurate as possible, particularly the spelling of the name and inclusion in the right gift category. Seeing one's name among a long list of other donors tells the donor that they are not alone in their belief that this organization provides a valuable service. I was once a donor for a nonprofit that I had an immediate positive reaction to but did not know a lot about. I gave some money but was not sure if this organization was one that I wanted to continue giving to. Then I received a newsletter from them and saw the list of everyone else who was a donor. When I recognized many people I have a lot of respect for, I immediately felt reassured that this organization was a good choice for my donations.

Thanking your donors personally and publicly is not only about raising more money from them. Treating your donors thoughtfully and sincerely creates a community of donors who become more connected and invested in your organization. You may very well find your next board member from this donor community as well as your next host for a house party.

Do not make the mistake of thinking that a thank you note is insignificant. It is a crucial link in your process of building and maintaining a vibrant and engaged donor community. GFJ

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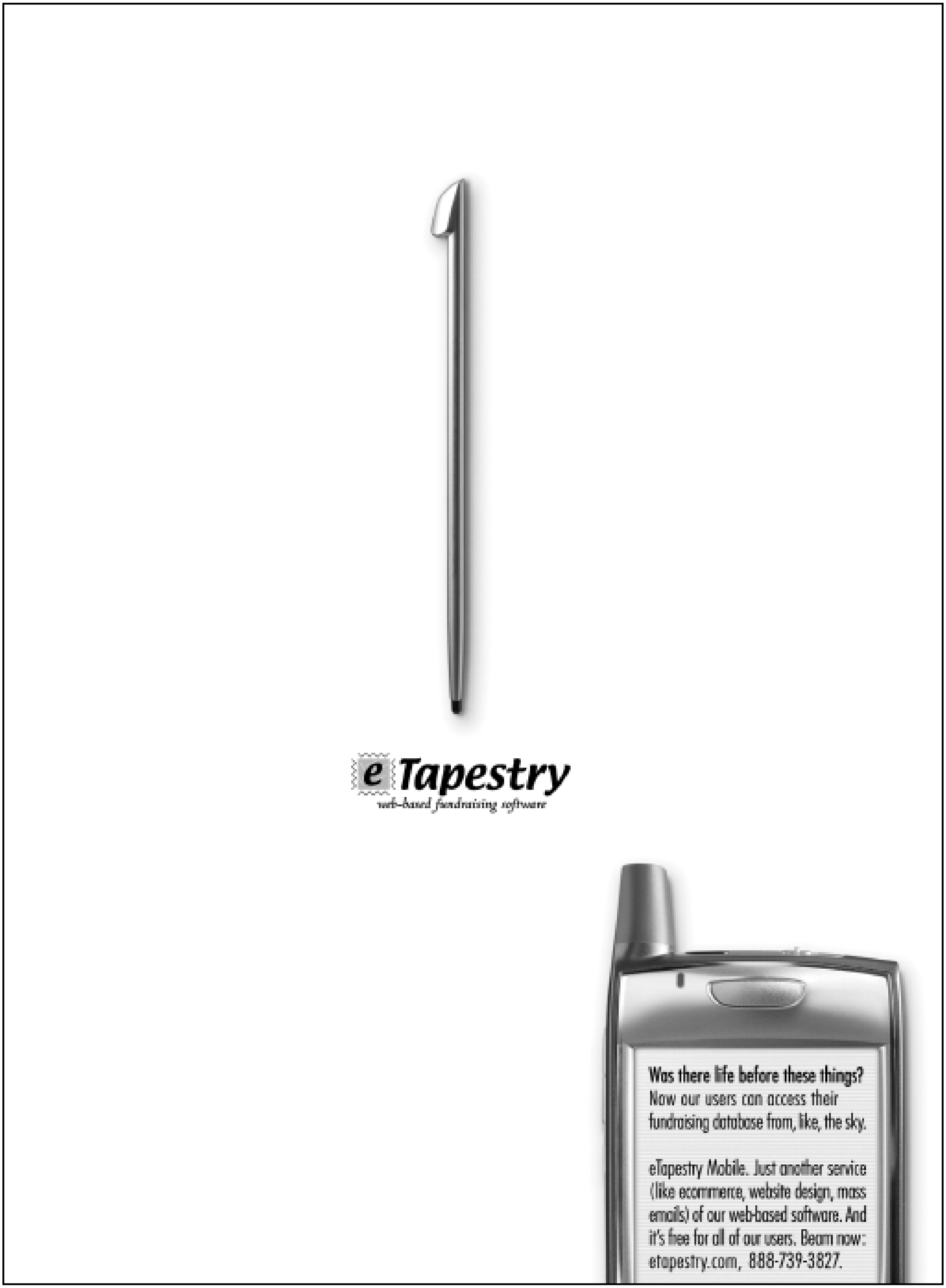
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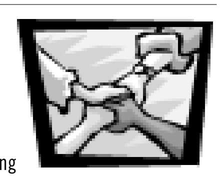

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