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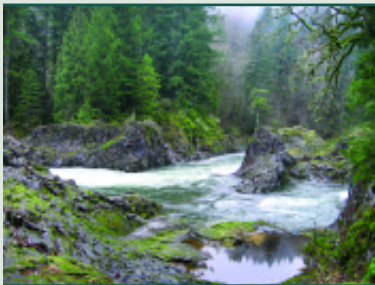
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LETTER FROM THE ASSOCIATE PUBLISHER

JENNIFER EMIKO BOYDEN

My partner and I had our second child in early January and I'm seeing how parenting — like fundraising — is not something we're born with, but that many of the skills needed are easily learned. I'm amazed at how much the experience of raising our older child has prepared us for raising our youngest. Things like knowing how little baby gear you actually need in the early months, despite the recommendations of some baby books or retail suppliers. Or feeling confident that a cry is not always a need to nurse but may be a request to be picked up, talked to, or put to sleep.

Fundraising, too, is learned, though aspects of it are also decidedly “unlearned,” like asking for what you need, including money — something most children are perfectly willing to do. Like parenting, fundraising is also something that gets easier and more successful with experience. And because learning new skills doesn't happen from just reading about them, I hope you'll take the information you read in this issue of the *Journal* and put it right to work!

This issue of the *Journal* offers lessons learned from the fundraising experiences of our authors. Pat Munoz of River Network offers up ways that even small amounts of money can be invested for short-term returns, an easy way to start building an organizational nest egg or bring in a steady flow of supplemental income. Next, Nicole Hsiang and Karen Topakian describe the key elements of successful fundraising letters, using a recent appeal letter they wrote for the Agape Foundation to highlight their points. Richard Male has some important advice for fundraising during an increasingly unstable economic period. Finally, George Taylor describes how integrating fundraising planning into the early stages of building an organization can contribute to a healthier and more sustainable group for the long haul.

And speaking of the long haul, please join us for the second **Raising Change: A Social Justice Fundraising Conference** on July 25 and 26 in San Francisco, where hundreds of social justice fundraisers and activists will gather to share their experiences of raising money for social change. An exciting line-up of workshops and keynote presentations will provide you with the inspiration and skills you need to continue doing the important work you do. More detailed information can be found on our web site: www.grassrootsfundraising.org. Hurry, the early bird registration deadline is May 31st!



USING your MONEY to MAKE MONEY

BY PAT MUNOZ

Nonprofit organizations often have financial assets that, if invested wisely, could become a source of steady, reliable income, a growing nest egg for future use, or both. Because busy executive directors and boards seldom have the time to think about the best way to invest these assets, they often lie dormant in bank accounts, generating little, or no, financial returns. This article discusses various alternatives for investing these financial assets and offers some potential guidance for how to develop an investment policy.

CATEGORIES OF ASSETS

Most nonprofit organizations have some financial assets — cash in the bank — whether they be \$5,000 or \$500,000. For investment purposes, these financial assets can usually be divided into three categories: short-term, medium-term, and long-term. Short-term assets are those that may be needed within several days or weeks to pay operating expenses. These monies might include grant funds from a foundation, donations from an annual appeal, or a large gift from a major donor. Medium-term assets are usually funds held in an operating reserve for budget deficits or emergencies. Long-term assets are generally funds the organization has set aside in a permanent reserve or an endowment fund to generate cash flow through interest, dividends, and appreciation. (For more information on why, when, and how to establish a reserve or an endowment, see the series on endowments in the 2005 issues of the *Grassroots Fundraising Journal* at www.grassrootsfundraising.org.)

**A small cash reserve,
if invested judiciously,
might double within
10-12 years.**

Whatever their size or expected use, these financial assets should be managed thoughtfully and consistently in order to preserve capital while providing maximum profits for the organization. Consequently, nonprofits with financial assets should have a policy for investing and tracking these assets appropriately and productively and should put in place a system for implementing that policy.

How Much Is Enough?

As you read this, you may be saying, “But we are so small! We don’t have enough money to invest!” And you may be right. Small organizations should not tie up their short-term assets unnecessarily when they are needed to pay day-to-day costs.

But a cash-flow analysis may reveal opportunities to use your cash advantageously without causing undue administrative hassles. For example, if your year-end appeal brings in \$15,000 and that money is not needed for operational costs for a number of months, why not sweep it into a savings or money market account or invest it in short-term certificates of deposit (CDs) or bonds, where it may generate significant interest?

With longer-term assets, the same holds true. A small cash reserve of \$20,000, if invested judiciously in a variety of stocks, bonds, and CDs, might double within 10–12 years if the proceeds are reinvested each year.

This kind of wise money management will impress funders and individual donors alike and may even motivate supporters to add to the reserve or endowment “pot.”

A previous version of this article appeared in *River Fundraising Alert*. Reprinted with permission from River Network. www.rivernetwork.org

Short-Term Assets

With funds that may be needed tomorrow, one of the best ways to ensure they are constantly working for you is to establish a “sweep” account at your bank, brokerage firm, or credit union.

With a sweep account, the organization determines what is an appropriate working balance to maintain in the operating checking account. The bank, credit union, or brokerage firm then can automatically transfer (sweep) anything in excess of that amount at the end of every day into an investment account where the funds earn the market rate of interest. Since this sweep is electronic, the organization does not have to do any calculation or make any transfers.

Should there be a need for more funds on a given occasion, the holder of the account will automatically cover any checks by sweeping money from the investment account back into the checking account. Thus any surplus funds are put to work earning interest. There are minimums and fees for most of these accounts and these will vary with the institution and the amount of funds maintained by the nonprofit.

Medium-Term Assets

Generally, medium-term funds that may be needed within a few months to a year to pay operating costs should be kept in low-risk, liquid investments such as savings accounts, CDs, and money market accounts.

One effective investing technique for medium-term funds is called laddering. First, divide your investment into roughly equal amounts. Next, deposit these amounts in short-term CDs of different maturities. The length of maturity terms should be spaced at intervals that don't jeopardize your access to at least some of your funds at any given time.

For example, divide \$4,000 of a \$5,000 fund into four equal parts, keeping \$1,000 in an account you can access immediately. Next, invest \$1,000 each in a 3-, 6-, 9- and 12-month CD. As each CD matures, extend, or roll over, the CD for another year. This allows you to establish a stream of CD investments that mature every three months. If you ever need more than \$1,000 of your fund, the longest you will have to wait (unless you pay a fee for early redemption) will be three months.

Long-Term Assets

Longer-term funds, such as permanent reserves or endowment funds, are usually invested in a diversified “portfolio” of investments designed to produce the highest possible return while exposing the organization to a prudent amount of risk as defined by the organization's investment policy (see below). For small organizations wishing to invest, diversification is essential to minimizing risks of losing a substantial amount of money due to a depressed industry sector or an unsuccessful company.

Carefully chosen equity (stock) mutual funds, including index funds, can offer a means of achieving risk diversification consistent with the organization's investment policy statement. Other appropriate long-term investments for small organizations might include exchange-traded funds (ETFs) and corporate or U.S. Treasury bond funds.

INVESTMENT POLICY

There are several reasons to have an investment policy:

- Improved investment results
- Clear, shared responsibility for funds management
- Ease and consistency in making investment decisions

An investment policy is valuable not only for day-to-day guidance; it also helps avoid changing investment strategies frequently in response to fluctuations in economic and market conditions or as a result of the changing risk tolerances of board members.

A good policy should address the following issues:

- Investment objectives (safety, growth, liquidity, and so on.)
- Asset allocation and diversification (percent in fixed income, equities, cash)
- Preferred quality ratings for stocks, bonds, and other securities
- Social criteria for investments, if any
- Authorized board or staff to invest funds and manage accounts
- Reporting requirements (when, to whom)

A thorough policy can also spell out the organization's investment philosophy, selection and duties of external investment management firms, and investment performance objectives. See the sample investment policy on page 6 for the kinds of things groups specify.

Overseeing Investments

Although the board of directors maintains ultimate oversight and decision-making responsibility for investments, organizations may designate an investment committee to draft policy, manage investments, and/or review decisions made by a professional investment manager and recommend policy changes to the board.

Such committees should include the treasurer and board members or non-board members who have investment experience. In some cases, boards may delegate responsibility for this function to the executive director or other staff member. In this case, two staffers should be designated to provide adequate financial controls, and these persons should report regularly to the board.

Diversification of long-term assets is essential to minimizing risks.

River Network Investment Policy

NOTE: This is an actual investment policy statement designed for a particular organization and none of the information in it should be used verbatim by any other organization. Each organization needs to carefully craft its own Investment Policy, taking into consideration its own financial needs, risk tolerances, and financial expertise.

FINANCIAL ADVISOR

River Network employs a Financial Advisor(s) to work with the Finance Committee to invest our reserve. Using the guidelines set out in our investment policy, the Advisor makes investment decisions throughout the year. The Investment Advisor will submit quarterly reports on our portfolio performance. The Finance Committee formally reviews our portfolio and its performance at least twice annually.

In seeking an investment advisor(s), we look for the following:

- **Experience.** We want someone with a proven track record: someone who has worked with nonprofit organizations and someone with experience using environmental social screening as an investment criterion.
- **Resource.** An investment advisor can often be an added resource in assisting with record keeping and advising on planned gifts. He/she can also be a strong source of referring potential donors to River Network.
- **Geographic location.** Though geographic location is somewhat flexible, it's best if an advisor is near our Portland office.

INVESTMENT POLICY

The Board of Directors has delegated supervisory authority over its financial affairs to the Finance Committee of the Board. The Finance Committee is responsible for regularly reporting on investments to the full Board. In carrying out its responsibilities, the Finance Committee and its agents will act in accordance with these Investment Policies and all applicable laws and regulations. The Board reserves to itself the exclusive right to revise the Investment Policies. The Committee will review the investment policy annually.

General Investment Principles:

1. Investments shall be made solely in the interests of River Network.
2. The Investment Accounts shall be invested with care, skill, prudence, and diligence under the circumstances then prevailing that a prudent person, acting in like capacity and familiar with such matters, would use in the investment of a fund of like character and with like aims.
3. The Investment Account shall be so diversified as to minimize the risk of large losses, unless under the circumstances it is clearly prudent not to do so.
4. Cash is to be employed productively at all times, by investment in short-term cash equivalents to provide safety, liquidity, and return.

INVESTMENT OBJECTIVES

River Network's objectives for the operating reserve, in order of importance, are:

1. Preservation of capital
2. Current income
3. Capital appreciation

River Network's objectives for the permanent reserve, in order of importance, are:

1. Current Income
2. Capital Appreciation
3. Capital Preservation

ASSET ALLOCATION

River Network's reserve is divided into two different funds:

- Operating Reserve
- Permanent Reserve

Each fund has a different set of objectives though the primary investment objective of all funds is to preserve and protect its assets. The financial advisor is authorized to utilize portfolios of equity securities, fixed-income securities and short-term (cash) investments. The advisor shall stay within the limits below.

- **Cash and Short-term Reserves:** Operating Reserve 60–100%; Permanent Reserve 0–30%
- **Fixed-Income Securities:** Operating Reserve 0–40%; Permanent Reserve 20–40%
- **Percent Equity:** Operating Reserve 0–20%; Permanent Reserve 50–80%

ASSET QUALITY

- **Common Stocks:** The quality rating of at least 80 percent of common stocks should be B+ or better, as rated by Standard & Poor's or other equivalent rating services.
- **Convertible preferred stock and convertible bonds:** The Investment Advisor may use convertible preferred stocks and bonds as equity investments. The quality rating of convertible preferred stock and convertible bonds must be BBB or better, as rated by Standard & Poor's, or BAA or better as rated by Moody's.
- **Fixed-income securities:** The quality rating of bonds and notes must be A or better, as rated by Standard & Poor's or Moody's.

SOCIAL SCREEN

River Network desires to invest in companies whose business conduct is consistent with our beliefs and goals. Therefore, the Advisor will use its best efforts to use a coarse environmental social screen [such as the Domini 400] for our investments and use the following screening strategies. The strategies are broad in that we do not want to limit severely the investment options of the Advisor. However, we do not want our funds to be invested in companies that work against the mission of the organization.

- Avoid investing directly in securities of any company which the Board deems to be against the values of the organization.
- Support companies that promote and display our values.

The Finance Committee will review new positions in River Network Investment Accounts on a regular basis and will immediately advise the Investment Advisor if the asset is not acceptable to the organization.

The investment committee or staff, or both, should meet annually to review the performance of the investments and recommend any necessary changes.

Hiring an Investment Manager

Some organizations engage outside professionals to manage their investment portfolios. The manager will charge a fee, usually in the neighborhood of 1 percent of the portfolio annually. Nonetheless, if the organization has significant assets, it will probably do better with a manager. Banks or brokerages may also charge a fee per investment transaction (purchase or sale).

Some organizations, particularly smaller organizations with limited administrative staff, use community foundations to invest their long-term funds. Many community foundations will accept and manage endowments for other nonprofits and invest them along with their own funds. They will make periodic payouts to the nonprofit and provide reports on how the investments are doing.

Using a community foundation has other benefits: often the foundation will give the nonprofit's donors access to planned giving vehicles such as charitable annuities, provide added visibility in the community, and recommend the nonprofit to their donors and in their publications. Directors of community foundations are often experienced fundraisers themselves and can provide tips and guidance to smaller nonprofits they are associated with. The community foundation nearest you can be easily found by going to www.communityfoundationlocator.org.

The downside to using community foundations for investment purposes is that the nonprofit must relinquish control over the funds in the endowment. The endowment becomes the property of the community foundation, to be managed on behalf of the nonprofit in perpetuity unless the nonprofit goes out of business, in which case another similar organization is chosen by the foundation as the recipient of the proceeds from the endowment.

Like banks and other institutions, community foundations charge a fee to manage endowments, and this tends to be slightly higher than that charged by banks.

Stock Gifts

More and more, small organizations are becoming the recipients of stock gifts, particularly at the end of the year. Since most stock gifts are for unrestricted operating support, it is usually unwise to hold the stock and speculate on its short-term performance. The usual procedure is to sell the stock immediately and put the proceeds into a savings account or other safe vehicle.

Even if the stock gift is intended for the operating reserve or endowment, most organizations choose not to hold on to individual securities, but to sell the gift and add the proceeds to the reserve or endowment capital, to be invested in accordance with the investment policy.

Socially Responsible Investing

Socially responsible investing (SRI) integrates personal values and societal concerns with investment decisions. Screening individual companies to determine their record in terms of any of the social screens you may want to put in place (environmental record, treatment of workers, type of product produced) can be extremely difficult, if not impossible, for small organizations, but the same end can be achieved by investing in a socially responsible fund that screens its investments for impact (positive or negative) on the factors of importance to you.

One good source of information on socially responsible investing is the Social Investment Forum (www.socialinvest.org), which has great charts for comparing mutual funds and a directory of social investment resources.

HOW TO BEGIN?

A good place to begin is to sit down with your accountant and board treasurer and look over your financial situation.

Could your long-term assets be invested more productively? Does a cash-flow analysis reveal opportunities to shift short-term funds into savings or invest money temporarily in short-term CDs?

Once you have determined that there are opportunities to invest your assets more productively, the next step is to involve your board. Ask them to develop a simple investment policy that addresses the questions of allocation, management responsibility, and risk tolerance. (See sample at left.)

With your policy in place, the individual or committee in charge should talk with financial experts, such as your local banker, local broker, or perhaps your local community foundation program officer, about investment opportunities. Do you have a board member or volunteer who is experienced in financial management and might take on this responsibility? If not, could you recruit someone from your membership to help out?

JUST DO IT

Don't feel that you have to get everything perfect the first time. As long as you err on the conservative side, doing something is better than doing nothing at all. **GF**

Many thanks to all the people who assisted with this article, including Clem Dinsmore, of A.G. Edwards & Sons, Inc.; Bill Botzow and Susan Schwartz, River Network; Donna Merrifield; Marguerite Griffin, The Northern Trust; and Linda and Stan Collyer.

PAT MUNOZ HAS BEEN INVOLVED IN NONPROFIT FUNDRAISING FOR OVER 25 YEARS. SHE CAN BE REACHED AT PMUNOZ@RIVERNETWORK.ORG, (202) 364-2550.

Dissecting

A FUNDRAISING APPEAL

BY NICOLE HSIANG & KAREN TOPAKIAN

Writing a fund appeal can be a daunting task, especially if you are a relative newcomer to the trade. It needn't be as difficult as you think, however. Before you start to write there are two things to consider so you can tailor your message: First, who is your audience, and second, why do they give? Even though fund appeal letters are sent to hundreds, if not thousands of people, they are read one person at a time. It is to that one person that you must write.

WHO IS THE READER?

In order to answer these two questions, ask yourself, Who is the reader? Is it a current donor, a lapsed donor (someone who hasn't given in more than 12 to 18 months), or is this an acquisition mailing to someone whom you are asking to become a donor? Each one of these readers would require a different message.

If you are writing to a lapsed donor, you will want to remind her or him of how valuable their past gifts have been to your organization, the progress you've made since their last gift, and how much work lies ahead that can't be accomplished without their financial help. An acquisition letter has a bigger job to do: it must introduce the organization and its mission to the reader as well as present a compelling reason for the reader to give.

The letter annotated here was written to the current donors of the Agape Foundation — Fund for Nonviolent Social Change. The letter was directed to people who have given more than once and in many cases for many years. These are donors that Agape knows well.

WHY DO THEY GIVE?

Once you have decided on your audience, the next step is to determine why they give. If they are already or have been donors are they interested in a particular program or in the organization in general? Do they give because of a particular staff person or board member? You may not know the answers to these questions about the bulk of your donors, but if you do, a personal note on the letter from that staff person or board member will go miles toward ensuring that next gift. If they give because of a particular program, make sure you highlight or

mention all your programs in your letter, so each donor sees the ones that are meaningful to them. The reader wants to see their own beliefs, interests, philosophies, and perspectives reflected in the appeal.

Fundraising letters often revolve around a theme. The one here has peace as the theme because Agape historically has funded anti-war efforts. We know that our donors care deeply about this issue and want us to continue providing resources to end the current war. Drafting a letter around a theme can give you a new way to talk about the same issues you have been addressing for a long time. It's a packaging and marketing technique that works.

WHAT TO SAY

The beauty of writing a fund appeal is that it need not be great literature. It had best not be fiction, yet it's not journalism either. It is conversational, repetitive, informative, and emotionally moving. The letter doesn't need to follow all of the rules of good writing. You can use phrases as sentences. Start a sentence with But or And. Repeat phrases for rhythm or emphasis. Use contractions. Most important, use the word "you" early and often. The word "you" should appear more often than "I," "me," or the name of the organization, program, or project that you are writing about. Why? Because people like to read about themselves, and writing "you" accomplishes that task.

The letter needs to include a few basic points: a thank you for their past gift; the impact or results of that gift; exciting, critical, timely activities that you are planning to do next; and an ask for another gift to accomplish those goals along with anything else you may want them to do.

How you frame the letter can vary widely. You can lead with the thank you or build it into the text. In order to engage the reader's heart, start with a compelling story about someone or some issue that benefited from your organization's work. Then work in the thank you to let the reader know how their gift played a role in this success. You can also lead with a challenge or a dilemma that only the reader's gift can resolve.

People give to your organization because they care about the work that it does. So tell them what you have done and what you plan on doing next. Everyone wants to

be part of a winning team. Help the reader see and feel that they are part of your victories. Because they are.

THE END MAY BE FIRST

Donors have learned that fund appeals aren't mysterious, so nothing is ruined when they read the last paragraph first. And they often do. Make it worth their while. Give your most compelling reason to give in that last paragraph. Kim Klein (founder of the *Grassroots Fundraising Journal*) tells us that donors often only read the first paragraph, the last paragraph, and the P.S. — and maybe nothing else. They will skim the letter looking for anything bolded, highlighted, bulleted, or in italics. That doesn't give you license to fill the page with these eye-catching elements. A little can go a long way. Two per page is a good rule of thumb. But do use them to break up the page.

If you get stuck starting or ending or just writing in general, pick up a copy of Mal Warwick's excellent book, *How to Write Successful Fundraising Letters*. He too saves the best for last. Chapter 19 is titled, "How to Overcome Writer's Block." Warwick provides examples of strong leads, outstanding ways to use the word "you," powerful ways to end a letter, and ways to start a P.S. The best of writers needs a jumpstart every once in a while.

The annotations on the letter here will show you how we put these ideas into practice. By incorporating these suggestions, your next fund appeal letter may flow a little easier and, we hope, raise more money. **GF**

NICOLE HSIANG WAS AN INTERN AT GIFT IN 2005, AND CURRENTLY WORKS AS DEVELOPMENT ASSOCIATE AT THE AGAPE FOUNDATION AND AT SAN FRANCISCO WOMEN AGAINST RAPE.

KAREN TOPAKIAN HAS BEEN THE EXECUTIVE DIRECTOR OF THE AGAPE FOUNDATION — FUND FOR NONVIOLENT SOCIAL CHANGE SINCE 1993.

Agape Foundation
Fund for Nonviolent Social Change

Autumn 2007

Dear Friend,

Think about it for a minute. To be for or against the war, we all have a choice.

But what if military recruiters showed up in your high school every day, offering you and your family money for enlisting in the army? Or citizenship if you are an immigrant? What if you were harassed, detained and imprisoned for refusing to go to war?

The truth is, choosing peace isn't easy in today's society. It takes incredible strength and determination to do what you feel is right when our government thinks you're wrong.

When activists and World War II conscientious objectors opposed to the Vietnam War started the Agape Foundation in 1969, they understood the critical need to strengthen the anti-war movement with funds and resources. **In fact, we were founded in order to fund anti-war activism.** It's unfortunate that we are still doing that today.

For more than 38 years, our support has amplified the voices of those in our community who say "NO!" to war and violence, providing more than \$12.5 million to grassroots organizations in California. **With your financial assistance, the Agape Foundation has funded more than 30 organizations specifically working for demilitarization** since the onset of the war in Iraq.

Let me show you just some of the many ways that your generosity is helping the Agape Foundation to create peaceful change in a time of war by funding the organizations that seek that change:

- **Empowering students to resist military recruitment on their school campuses**
 - Coalition Against Militarism in Our Schools, South Pasadena (Spring 2007)
 - Military Out of Our Schools (MOOS) - Bay Area, San Francisco (Spring 2006)
 - Monterey Peace and Justice Center, Counter Recruitment Campaign, Monterey (Fall 2007)
- **Distributing progressive art and media to inspire and educate the public about the truth behind military violence.**
 - Art and Revolution, San Francisco (Spring 2002)
 - Dancers Without Borders, San Francisco (Spring 2003)
 - The Freedom Archives, San Francisco (Spring 2003)
 - War Times, San Francisco (Spring 2002)
 - Whispered Media, San Francisco (Fall 2003)

(Continued...)

Annotations:

- If possible, change "Friend" to the reader's name.
- Personally address the individual reader by using "you" and "your" as much as possible.
- Include one sentence that reminds the reader about the historical context of the organization — the age of the organization and its reason for existing.
- If this letter is to existing donors, be sure that you acknowledge and thank them as much as you can for their part in your organization's achievements. Make sure they know that their donation matters.
- Write "I" or "me" to personalize the voice of the letter writer. It is almost as important as "you."
- Begin with a short, catchy lead sentence to grab the reader's attention.
- Asking rhetorical questions is a good thought-provoking device.
- Peace is the central theme of the letter. A theme is a good tool to employ to frame your appeal, particularly if it's a theme that mirrors the mission of the organization.
- Keep your paragraphs fairly short — around two or three sentences — so that there is a lot of white space in between. Short paragraphs make it easier for the reader to quickly skim through the letter and are therefore more inviting.
- Use a bold font to highlight strong key sentences. Many of your readers will only read the lines in bold. Given this fact, you want to make sure that your message comes across in those sentences alone!
- Include numerical data to shore up your arguments, support your position, or reinforce your accomplishments.
- Use bullet points strategically to break up the paragraphs, add more space, and make it easy to read a lot of facts and information.

- **Strengthening the organizing work of youth, women and people of color affected by militarism in their communities.**
 - Asian Pacific Islander Coalition Against War, Oakland (Spring 2002)
 - East Asia – U.S. – P.R. Women’s Network Against Militarism, San Francisco (Spring 2002)
 - Guerrero Azteca Peace Project, Escondido (Fall 2005)
 - Next Generation, San Anselmo (Spring 2006)

After stating your organization's accomplishments, follow with what you are doing right now that needs your donor's continued support.

In appeal letters, it's okay to start a sentence with "And" or "But" because they are devices that make the letter flow, as if it were a conversation.

And right now, as you are reading this, the Agape Foundation's Board of Trustees is reviewing Fall '07 grant proposals, one-third of which are specifically focused on anti-war work. Your continued support could help us to fund: a book about nuclear arms and foreign policy, a film about Iraqi soldiers who have died in the war, and grassroots anti-war organizing in Nevada County.

But wait, there's more!

Mal Warwick would call this a "transition sentence" that recaptures attention as it transitions to another topic.

Just recently, on September 20th, the eve of the UN-declared International Day of Peace at our 3rd annual Agape Foundation Peace Prize Ceremony, we awarded the **Rising Peacemaker Prize** to Pablo Paredes, a former Navy soldier who in 2004 was court-martialed and sent to jail for refusing to go to Iraq. Since his release, Pablo has worked tirelessly to end the war, to defend the rights of GIs, and to educate thousands of young people about the myths and realities of military recruitment before they enlist. **Paredes received a standing ovation in a room of more than 200 people who supported his belief that the war in Iraq is illegal and unjust.** And thanks to donors like you, he also received a check for \$1,000 to further his work for peace.

If you were there, I'm sure you'd agree that it was an inspirational and moving event that motivated us all to not only stand by our beliefs, but to act on them as well, **no matter how difficult it may be.**

End the letter with a message of hope and a reason to give.

Let's end the war now. Please send a generous donation to the Agape Foundation now so that we can continue to recognize and support the people who are paving the path towards peace and liberation for all.

The "ask" should be as direct as possible. It is often put in bold font or underlined. It is not necessarily the last sentence of the letter.

Sincerely,
Karen Topakian
Executive Director

P.S. Hot off the press! Take a look at our enclosed annual report to read more about the 90+ nonviolent, social change organizations that the Foundation supported in 2006. A 43% increase from 2005! And take a look at the numbers from our audited financial statement!

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How to Prepare Your Nonprofit

FOR AN **ECONOMIC RECESSION**

BY RICHARD MALE

During the past several months a sense of panic has settled in about the economy, led by the issues of housing foreclosures, the loss of value in the international and national stock exchanges, and the federal government's economic stimulus package. Most economists are saying we are either close to or already in a recession that could last more than a year.

For nonprofits, these economic worries bring an additional challenge to raising funds. Individual giving is 85 percent of total philanthropic dollars; whether and how much someone gives away depends a great deal on how the individual who is giving the money feels about the economy. Private foundations, too, are feeling the pinch, as most are invested in a decreasing stock market.

So how should nonprofit organizations prepare for this recession if they haven't already done so? What should your contingency plan be if your fundraising results are affected by these economic changes? What can you anticipate and how will you provide leadership to your organization?

Here are 10 tips to help your organization face a not-so-certain future. Not surprisingly, the key is to put even more attention on strengthening your relationships with your donors. And because giving in response to direct mail as well as giving by foundations and corporations are all likely to decline during this time, making sure your donors understand what you are doing and feel appreciated for their support will be more important than ever.

1. Make it personal and stay in touch with your donors. When donors feel insecure about their future they tend to pull back on their donations. One exception to this trend is faith-based giving, where donors are likely to continue giving for another 18 months at the same level as they had

been giving prior to a period of financial insecurity. For all other types of organizations, it is important to get closer to your donors by doing such things as calling them by phone to thank and update them, inviting them to tour your building, or having breakfast briefings a few times during the next six months.

2. Don't rely as much on direct mail either for acquiring new donors or for getting relatively new donors to renew their support. Studies suggest that direct mail donations have been either flat or decreasing over the past few years.

3. Expect foundation funding to decrease as foundations' investment portfolios take a hit. Obviously, there are some foundations that will give more than the 5 percent of assets they are required to spend by law. But most

Making sure your donors understand what you are doing and feel appreciated for their support will be more important than ever.

foundations will probably decrease the amount they give, and more will be focused on their existing grantees rather than on new organizations.

4. Stay in touch with all your donors more regularly. Create a monthly e-newsletter for all of your donors, friends, and stakeholders that will keep them in touch with what is happening in your organization. Begin to collect as many e-mail addresses as you can.

5. Redefine your major donors downward so you have a larger base of "high touch donors." If you define your major donors now as those who give \$500 or more, try to lower the threshold amount to \$250 so you will have a larger pool of donors to cultivate and ask in personal ways.

6. Focus more on a "few major donors" and increase the personal time you spend with them. Your best donors could

end up being lifesavers who carry you through when times are tough.

7. Rely less on corporate philanthropy and more on corporate sponsorship and marketing dollars. On average, corporations give about 1 percent of pre-tax earnings to philanthropy. This amount might decrease even more during a lagging economy. What is likely to increase is sponsorship and underwriting dollars for your special events.

8. Increase your fundraising capabilities. In particular, consider investing more time and money in your database, attending a workshop or training session, and increasing your development staff. Realize your costs may increase a bit during these times.

9. Increase opportunities for your donor prospects and your donors to become involved. Donors are looking for increased involvement and less checkbook philanthropy. Look for ways they can be active in volunteering, special events, and committee assignments.

10. Develop contingency plans that answer all of the "what if" questions in terms of reduced revenue. Can you use volunteers where staff were functioning in good times? Are there opportunities for board members to play more technical roles? **GF**

RICHARD MALE IS A NATIONAL AND INTERNATIONAL CONSULTANT AND TRAINER WITH NONPROFIT ORGANIZATIONS IN THE FIELD OF CAPACITY-BUILDING AND COACHING. SIGN UP FOR HIS FREE WEEKLY "RICH'S TIPS" ON HIS WEBSITE — WWW.RICHARDMALE.COM.

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Fundraising **FROM THE BEGINNING**

BY GEORGE TAYLOR

Many organizations start out as simply a group of people wanting to do something about a problem or issue they care about. Along the way, they discover that they need to be better organized in order to get that change to happen. This usually means creating a more formal structure — that is, an organization. Often late in the process, they realize they need funds to support the organization's work.

I speak from experience. In 2000, I cofounded a group called Seaflow with others who were concerned about the whales, dolphins, and fish that were being seriously

arranging for public meetings, we all personally contributed what we could to pay for copies of informational materials, rent for places to make presentations, phone charges, housing for guest speakers and activists, and so on.

In the first flush of enthusiasm for our mission, we thought that our issue could be resolved quickly. This is a common stage for activist groups. In that first excited beginning, money concerns and the actual functioning of the new organization are low on the scale of things discussed. Eight years later, we are still working to alert the Navy and commercial interests to the damage their practices have caused and we're still working on policy solutions.

After the initial founding stage of our organiza-

tion, key volunteers began to be burdened by all the work as well as by the constant small drain of personal funds. We needed to start fundraising. This was a big step, and a good one. Fundraising and planning forced us to take a longer view about what it would take to solve the problem we had formed to address.

We shifted gears and started taking the time to build the internal capacity of the organization. For Seaflow, as for so many groups, we discovered that this internal work leads to better campaigns, better strategies, and better working conditions for employees and volunteers. It also gives the whole group better stability and sense of purpose.

THE FIVE THINGS YOU NEED TO START RAISING MONEY

Looking back at my experience with Seaflow and other groups I have consulted with, I see that by developing a few written statements that provide clarity about goals and plans, a team of activists can move quickly into fundraising. The following essential check list will help you get started.

Creating an organization was the furthest thing from our minds when we started.

harmed by Navy sonar and other sounds off the California and Hawaii coasts. We decided that policies were needed to protect these animals, and we set out to inform community members and influence decision makers.

Like a lot of other activist organizers, about a year into our campaign we realized that we had created an organization — the furthest thing from our minds when we started. Eventually, Seaflow grew to have an annual budget of \$200,000. This article will help you take advantage of what we learned along the way. It will provide you with some steps you can take as you build your new organization that will help you get off to a strong start and enable you to bring in the money you need.

BUILDING STABILITY AND PURPOSE

Like many organizations, at first Seaflow was merely a group of committed volunteers organizing community meetings. As we found that people were interested in our cause, we scheduled more events — at bookstores, retirement homes, and schools. While studying the issues and

For each of the vast subjects touched on, you can find more detail and great resources at the *Grassroots Fundraising Journal's* website: www.grassrootsfundraising.org.

1. A Core of Activists

If you cannot draw a core group together, you have no project. Look to your friends, other activists, or other people you know who have shown interest in your topic. For Seaflow, environmentalists and animal rights activists were natural to reach out to. Describe the problem to them. Present them with your ideas. Show them your first drafts of a mission statement (see ours below). Listen to and incorporate their feedback.

Many successful groups of activists also bring allies together — other activists who are working on similar issues in the community — for strategy discussions about their issue. There are many reasons to do this: to find out what other groups are working on, to assess who political allies will be, to find out what resources are in the community, and perhaps most important, to avoid duplicating efforts that others are already involved in.

As you begin to spread the word and recruit new activists, members, or volunteers, your job is to provide inspiration and education. People not only need to learn about the cause, they need to feel your passion and your concern.

2. A Mission Statement

With your core group, and based on the information you have gathered, you are ready to develop a mission statement. A mission statement identifies who your group is and what you want to do. It should be clear and inspiring. The process itself is edifying because it forces the core group to focus.

Here, as an example, is Seaflow's mission statement:

Seaflow is an educational, nonprofit organization building an international movement dedicated to protecting whales, dolphins, and all marine life from active sonars and other lethal ocean noise pollution. We draw on science, creative action, the arts, and community for inspired participation to safeguard the web of life

Only when Seaflow volunteers started working on our mission statement did we recognize that we needed an international coalition of interested people and organizations. The mission statement helped us focus our attention on human-made sound. That became our niche. We are still the only group in the country that focuses on the dangers of human-made sound in the ocean.

Mission statements are not easy to write. They can take many laborious discussions. Think of yours as a work in progress that is moving toward a clear statement of who you are and what you want to accomplish. When your key players read it together, you should feel a sense of shared purpose and focus. You can revise it as that focus becomes clearer.

3. A Preliminary Plan

A few of your leaders should create a one- or two-page overview, called a case statement. It contains the following elements, each of them necessarily brief:

- The background of the activists working on the campaign
- The need for the campaign
- What the campaign will accomplish — your purpose
- How you will accomplish your goals

The first section provides credibility for an organization that doesn't yet have a track record to show to potential donors.

When a donor gives you money, whether it's ten dollars or a thousand, or when a volunteer commits their valuable time to you, they want to know who's involved and what they've accomplished in other organizations or projects.

The second section explains the problem you are trying to solve and the evidence you have of the need for the campaign. For example, Seaflow began when we heard that Navy sonar exercises had driven mother and baby whales out of their breeding sanctuary in the Hawaiian Islands. We used these stories in our campaign literature and talks. When we could show that Navy sonar exercises resulted in dead whales washing up on beaches, people began to pay attention.

The third section gives donors and activists benchmarks so they can know if the campaign you are creating is succeeding. For Seaflow, one specific accomplishment was to create ocean noise regulations, nationally and internationally.

The final section presents the clearly defined projects and campaigns that flow out of the mission statement. Again, the activists should work together to assess what key groups they want to reach: Who are the natural allies for their campaigns, and what organizations do they belong to? Who has the power to make the change? This section begins to describe your campaign: How will you create the change that you are seeking — by mobilizing educated citizens? By bringing lawsuits? Once Seaflow was clear on our benchmarks, we began sending our staff and volunteers to United Nations meetings to educate delegates. We could fundraise for these specific, targeted projects.

Think of your mission statement as a work in progress.

Developing this document is a huge step for an organization or group as you move from the visionary to the actual. Your core team of activists should agree on everything that is in this statement. And they must know it cold so that they all give a coherent and consistent message to donors and the public. Unity of purpose and message also creates a strong field of connection between volunteers and helps to build a cohesive organization.

This document is one that can be shown to funders, volunteers, the press, and so on, as appropriate. It becomes the basis of longer strategic plans, marketing materials, education brochures, and the like.

4. A Simple Fundraising Plan

A fundraising plan is typically an internal document for staff and volunteers to use to organize their efforts. How much money do you need to cover your expenses for the next six or twelve months? To know this, you need to project what your activities will be and what they will cost. For example, Seaflow's programmatic strategy was to put on a lot of educational events. We knew each event would cost between \$50 and \$100. To do one event each month for a year, we would need about \$1,000. Knowing this, we could plan the fundraising activities to raise that money.

I am a great believer in community-based fundraising. More than 75 percent of the money donated in the U.S. in any year is given by individuals — the people who agree with your cause and believe in your organization become your community. So start with local meetings with your friends. Show them the mission statement, projects descriptions, and one-page statement. Ask for their support and feedback. Ask them for money. If you cannot ask your friends for money, it's going to be hard to ask strangers. More important, as people are inspired and engaged, they bring in the next round of donors and volunteers.

A fundraising plan should include the potential sources of income — events, donors, possible grants, and so on — as well as the amounts you think you can raise from each. These plans can be used to track which events and fundraising projects are successful each year. As years go on, they will provide a bigger picture about what works best for your group.

Fundraising plans must eventually be coordinated with strategic plans and with accurate yearly budgets. You can begin to ask: Which sources of revenue are the most beneficial, based on the skills of our staff and volunteers? When do we need to plan fundraising activities to cover shortfalls from other sources of income?

5. Ask for Money

Fundraising solicitations give you more chances to do what you do best: tell people about your issue in a way that

both helps them understand what it is and that moves their own hearts into action. Typically, the fundraising pitch takes less than 10 percent of the time spent in any presentation.

Activists are always thinking ahead, asking, "What is the next commitment or project to propose to people drawn to the cause?" Writing a letter or going to a protest are good answers to this question, but so is writing a check.

Fundraising takes practice. You'll get feedback about how your requests were received, and you'll improve. Over time, you will develop better and better collateral materials that demonstrate both why the community needs your campaign and the credibility of your organization.

Eventually you may want to write grant proposals, perhaps solicit from corporations with a local presence, and find other ways to raise funds, but the most cost-effective, energy-efficient way to raise money at the beginning of your project is to build a community of believers. As the months and years of fundraising continue, you tell your community your success story: "We told you we needed money for this, and this is what we accomplished with the money we raised."

WHAT SEAFLOW DID RIGHT

The activist experience of the cofounders, combined with the invaluable advice of local and national organizers, insured that Seaflow did a few things right as we began.

1. *We created inspiring educational events that attracted people who became our core volunteers.* Luckily, the three cofounders had already presented at many public events, and our topic had a clear emotional draw: Whales and dolphins were dying on beaches after Navy exercises.

If you cannot ask your friends for money, it's going to be hard to ask strangers.

We used these episodes to help people understand other crucial impacts of noise in the ocean.

2. *We planned for sustainable growth.* The magnitude of the problems many of us confront in our social transformation work is daunting. For us, the main ocean-noise creators are the US Navy, the oil and gas industry, and commercial shipping. Seaflow organizers eventually re-focused our efforts on the long haul it would take to deal with huge cultural and economic forces (fear and greed, to be specific). We realized that our work would take decades.

Throughout our financial and strategic planning, we kept in mind the need for sustainability within Seaflow's campaigns, job descriptions, and work loads. Personally, I had to let go of my images of a "quick fix" and be open to the grief I felt that animals were being injured and I couldn't

save them quickly. I learned to rely on other organizations and allies that we were able to support and educate. Those alliances and personal friendships gave me hope when I felt Seaflow's task was too large.

3. *We accurately predicted yearly budgets.* We itemized carefully the small but accumulating costs of upcoming events and projects. And we kept within our budget at all times by delaying projects we could not afford and by estimating costs accurately.

For seven years, we have been in the black every year, and we have \$40,000 in a reserve fund. All told, Seaflow staff and council have raised almost one million dollars.

I am happy that we have shown that you can start slow, be sustainable, and do good work. Seaflow board and staff were able to convert that great influx of passion and commitment into a long-term process for cultural change and save some whales and dolphins from harm.

CONCLUSION

Founding leaders and the volunteers we gather and inspire to action have a tremendous passion for social change, but often this passion and immense care are blunted or worn down by predictable institutional issues that include lack of foresight, lack of planning, and lack of attention to financial planning and fundraising.

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By bringing more systematic organizational and financial planning to our projects, we will create a new level of sustainability in our work: well-paying jobs, employee health and happiness, low turnover. Good planning helps to maintain the joy, creativity, and zeal of our nonprofit workers, and produce greater impact in our work. **GF**

GEORGE TAYLOR IS DEVELOPMENT CONSULTANT AT MARINLINK IN MARIN COUNTY, CALIFORNIA, AND DIRECTS THEIR FISCAL SPONSORSHIP PROGRAM. REACH HIM AT GEOTAYLOR@EARTHLINK.NET.

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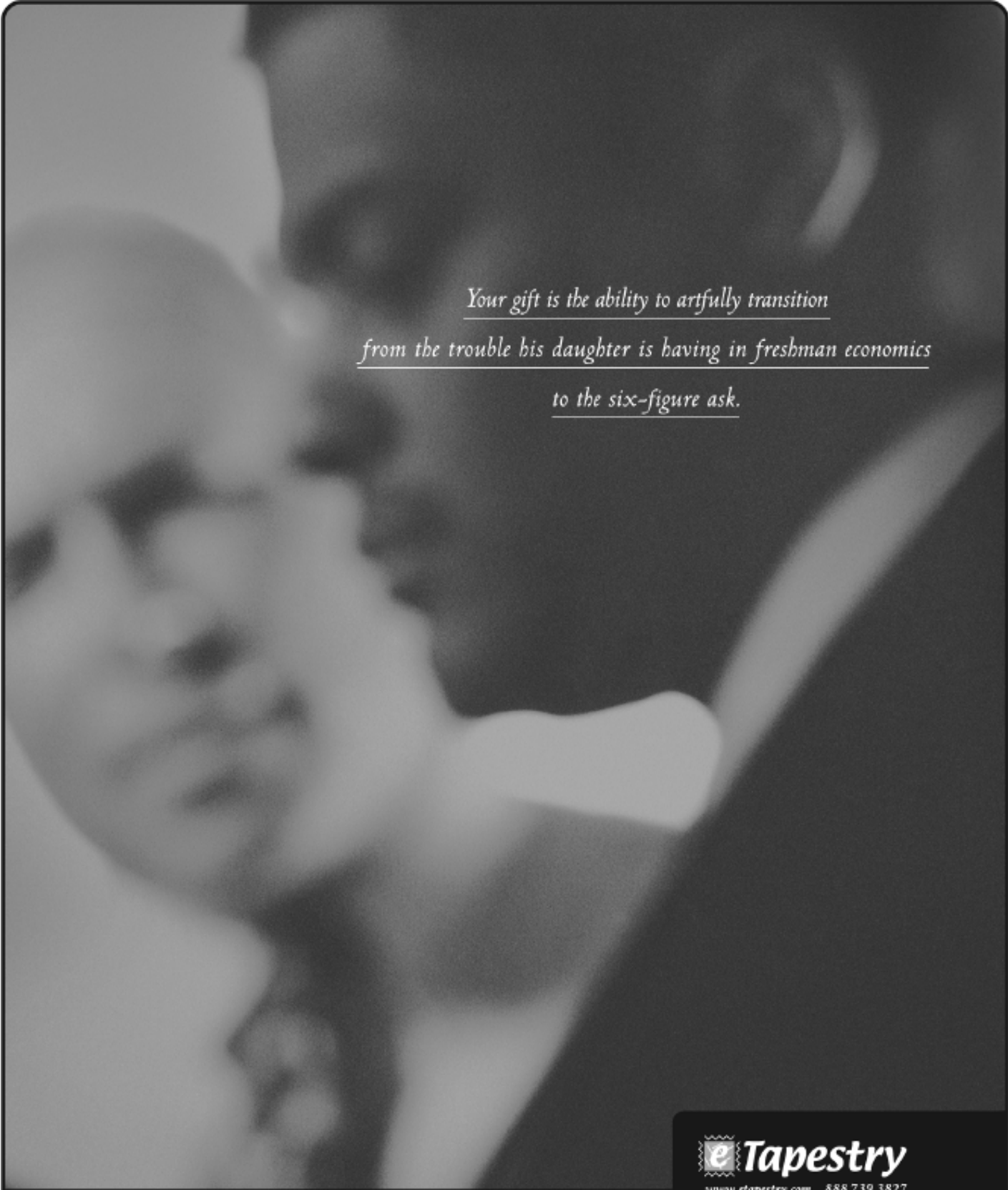
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