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THE WHITE HOUSE

Office of the Press Secretary

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THE CRUSADE FOR A DRUG-FREE NATION

FACT SHEET

> "We can be proud our students are just saying 'no' to drugs. But let's remember that ending this menace requires commitment from every part of America and every single American -- a commitment to a drug-free America."
>
> --- President Reagan
> State of the Union Address
> January 25, 1988

The Nation's drug problem reflects the consequences of 25 years of neglect dating back to the days when illicit drug use was called a harmless, victimless crime. As Governor of California, Ronald Reagan spoke out against the drug culture. In his first White House press conference, the President said, ". . . the answer to the drug problem comes through winning over the users to the point that we take the customers away from the drugs. . . ."

Since 1981, President Reagan and First Lady Nancy Reagan have led an unprecedented assault against illegal drugs that have been killing our children, wrecking our workforce and weakening our Nation. The President has committed the federal government to help stop drug use. Mrs. Reagan has declared there is no middle ground on this issue: Any use of illicit drugs is unacceptable. Real progress toward the goal of a drug-free America will be best achieved by preventing individuals who do not use drugs from beginning, and by convincing those who do use to stop.

Increasing numbers of America's young people are saying "no" to all types of illicit drugs. The Department of Health and Human Services has reported that current use of cocaine among high school seniors dropped by nearly one-third in 1987. And only one in 30 seniors used marijuana on a daily basis in 1987, the lowest level since surveying began.

PRESIDENT REAGAN'S COMMITMENT TO A DRUG-FREE AMERICA

The Drug Abuse Budget

- Because of the President's commitment, Federal spending for drug enforcement and abuse programs is more than three times higher in FY 1988 than it was in FY 1981. In FY 1989, we will request about $400 million more than Congress appropriated in FY 1988, a 12 percent increase in just one year.

Federal Funding for Drug Enforcement, Prevention and Treatment (in millions of dollars, with estimates for FY 1988 and 1989)

1981	1988	1989
$1,186	$3,482	$3,891

- Included in the budget are funds for the enforcement of drug laws through interdiction and seizure; investigation and prosecution; research; treatment for drug abusers; drug-abuse prevention; drug screening for the Armed Forces; eradication of illegal drug crops at home and abroad; prison construction; and other activities that assist in meeting the President's goal of a drug-free America.

- Each year from FY 1982 to FY 1986, between $212 million and $250 million in block grants to pay for treatment for drug and alcohol abuse was distributed to State and local governments. In FY 1987, as a result of the President's initiative, $163 million was added to these dollars.

- State and local governments and the private sector are playing a critical role in preventing and treating drug abuse.

Recent Administration Initiatives

- In August 1986, the President redoubled efforts against drug abuse with six specific goals for a drug-free America.

  1. Drug-free workplaces for all Americans.
  2. Drug-free schools, from elementary to university.
  3. Expanded treatment for drug users.
  4. Improved international cooperation to cut off the production and transportation of illegal drugs.
  5. Strengthened drug law enforcement, using all of our additional resources to stop drug traffickers.
  6. Increased public awareness and prevention -- the key to preventing drug abuse.

- The Department of Education published Schools Without Drugs to mobilize school, parent, and community efforts against drug use.

  -- 1.8 million copies have been distributed to educators, parents and drug enforcement agencies.

  -- The Department of Education has a new program for schools, The Challenge Campaign, to encourage schools to adopt the initiatives outlined in Schools Without Drugs.

- The Department of Housing and Urban Development has taken the lead in a cooperative national effort to achieve drug-free public housing. A national conference was held in Atlanta and a series of regional conferences were held for over 2,100 public housing residents, administrators, law enforcement officials and drug treatment officials to explore ways to achieve drug-free public housing.

- The Department of Health and Human Services has developed models for identifying drug use in the workplace and appropriate employee assistance and treatment programs.

The Decline in Illicit Drug Use

The evidence is clear: The crusade for a drug-free Nation is succeeding. The President's program is changing behavior. Drug use, and the acceptance of drug use, are declining. A recently released HHS survey confirms the positive effect the President's programs are having on high school drug use.

- Cocaine: Current use of cocaine among high school seniors dropped by one-third in 1987, from 6.2 percent in 1986 to 4.3 percent in 1987, the lowest level since 1978. And the number of students reporting they used cocaine at least once in the past year fell by nearly one-fifth, from 12.7 percent in 1986 to 10.3 percent in 1987.

  Last year, nearly half the seniors (48 percent) saw "great risk" in trying cocaine. In 1986, only one-third (34 percent) saw such risk. Fully 97 percent of seniors disapprove of regular use of cocaine, and 87 percent disapprove of even trying the drug.

- Marijuana: One in 30 seniors used marijuana on a daily basis in 1987, compared to one in nine in 1978. This is the lowest level of use since the University of Michigan began its survey of drug use in 1975.

- Today's seniors finally realize that using illicit drugs is not just dumb, it is deadly. The President's approach -- described in his first Presidential press conference -- of taking "the customers away from the drugs" is succeeding.

# # #

Punishing Drug Traffickers

- o President Reagan believes the first duty of a civilized society is to protect itself from those who prey upon the innocent.

- o The number of Federal drug investigators increased from 3,151 in 1981 to an estimated 6,230 in 1988.

- o FBI drug convictions reached record levels in 1986, and DEA arrests and convictions are the highest ever.

- o Between 1979 and 1987, average sentence length for persons convicted of drug law violations increased by 44 percent, from 51 months to 73 months.

Average Federal Prison Sentences
For Violations
Of Drug Prevention and Control Laws
(in months)

Year	Sentence
1979	50.8
1980	54.5
1981	55.5
1982	61.4
1983	63.8
1984	65.7
1985	64.8
1986	70.0
1987	73.0

PROGRESS TOWARD A DRUG-FREE SOCIETY

The Nation has launched an aggressive attack on drug pushers by expanding Federal drug law enforcement to its highest level and persuading young people that drug use is a deadly diversion that will not be tolerated. Substantial gains have been made toward a drug-free military, drug-free schools and drug-free public housing. Through a wide-ranging anti-drug program, the Transportation Department is ensuring safe transit of people and their goods. And, as the Nation's largest employer, the Federal Government is setting the standard for promoting a drug-free workplace.

- o Drug use in the military has dropped by 67 percent since 1981.

- o In 1981, one country and two States were eradicating narcotics plants. Today, 20 countries and 46 states are doing so.

The First Lady

- In his address, President Reagan singled out First Lady Nancy Reagan as one of the "heroes" who "has helped so many of our young people to say 'no' to drugs." The President said: "Nancy, much credit belongs to you and I want to express to you your husband's pride and your country's thanks."

- The First Lady is a national and international leader in the crusade against illicit drug use. She has traveled over 170,000 miles to 62 cities in 31 States and 8 foreign countries in her campaign to encourage young people and their parents at home and abroad to "Just Say No" to drugs. The First Lady has been instrumental in the establishment of thousands of parent and youth groups.

- In 1985, Mrs. Reagan hosted two international conferences on drug abuse, one at the United Nations and the other jointly held in Washington and Atlanta.

The Vice President

- In January 1982, Vice President Bush, at the request of President Reagan, established the South Florida Task Force in coordinating the law enforcement offensive against drug traffickers. This landmark approach significantly strengthened our ability to interdict the flow of drugs.

- In March 1983, the President asked the Vice President to lead the National Narcotics Border Interdiction System (NNBIS), a nationwide extension of the South Florida Task Force, to improve interagency coordination and cooperation. NNBIS increased the role of the military and of intelligence agencies and promoted international anti-drug efforts. NNBIS has won unprecedented cooperation from Federal, State and local law enforcement agencies. The military loaned equipment worth $400 million to the effort and operated sophisticated surveillance aircraft and Navy ships in support of law enforcement efforts.

Enforcing Drug Laws

- Thousands of pounds of heroin, hundreds of thousands of doses of illicit dangerous drugs, hundreds of thousands of pounds of hashish and tens of millions of pounds of marijuana have been confiscated under this Administration. The value of drug-related assets seized by the Drug Enforcement Administration in 1987 increased 25 percent over the 1986 level to $501 million. Seizures of clandestine laboratories in 1987 were up 34 percent to 682 laboratories.

- Seizures of cocaine by Government agencies have consistently and substantially increased since 1981. In FY 1987, a record estimated 92,000 pounds of cocaine were seized at U.S. borders.

- A Drug-Free Federal Workplace -- In September 1986, President Reagan signed Executive Order 12564 significantly strengthening the policy against illegal drug use by Federal employees. The Executive Order requires Federal agencies to establish programs to educate their employees on the dangers of drug use, to identify drug users, and to provide treatment and counseling. It also provides, where appropriate, for drug testing of Federal workers, particularly those in positions involving public safety and national security. Scientific and technical guidelines for drug testing were issued by the Department of Health and Human Services in February 1987. Case law supports drug testing. And the Supreme Court has twice refused to disturb decisions upholding mandatory testing programs.

- The Anti-Drug Abuse Act was signed into law in October 1986. Virtually every new or enhanced program was in place, and awards made to those eligible, by the end of fiscal year 1987. Block grant funds for treatment services are available for distribution to the States and the funding is in place to initiate new or expanded drug and alcohol services. The Department of Health and Human Services established the Office of Substance Abuse Prevention to carry out the prevention activities of the Act.

- The National Drug Policy Board was created in March 1987. The President gave the Board oversight and coordination responsibilities for all Federal drug abuse health and enforcement functions. The Board has adopted five strategies to reduce the supply of illegal drugs: enhanced international cooperation; stepped-up interdiction of drugs entering the U.S.; improved intelligence on drug activities; stepped-up investigations to eliminate drug trafficking organizations; and targeting prosecution of top drug organizations. The Board has developed four strategies to reduce demand for illicit drugs: prevention education; reduction of drug use by high-risk youths; improved treatment for addicts; and fostering attitudes of intolerance to drug use by adults.

- White House Conference for a Drug-Free America was established by the President on May 5, 1987. Its mandate is to review and assess all aspects of the drug crisis and report to the President and to Congress. To meet its goals, the Conference has held six regional forums. A national assembly will be held in Washington from February 28 to March 3 to discuss the findings of the regional conferences. Effective programs to create a drug-free America will be highlighted.

- United Nations International Conference on Drug Abuse and Illicit Trafficking was held in Vienna in June 1987. Attorney General Meese represented the President in the first U.N. conference on drug abuse. By unanimous consent, all 138 nations agreed to "commit ourselves to vigorous international actions against drug abuse and illicit trafficking as an important goal of our policies."

AT THE CROSSROADS: THE CRUSADE FOR A DRUG-FREE AMERICA

The nation stands at a critical juncture in the struggle against the illegal use of drugs, one defined by the intersection of two highly visible and seemingly contradictory trends.

The Crossroads

o The shift in attitudes away from illicit drug use and drug users is an extraordinary success story.

-- Ten years ago, the majority of our fellow citizens could be divided into two camps: those resigned to the fact of illegal drug use, and those who accepted the myth that drug use was glamorous, harmless, or someone else's problem.

-- Today, most Americans know the dangers and are intolerant of drug use.

-- Young people have been the primary target of the intensive education and prevention efforts ordered by President Reagan and energized by the moral leadership of First Lady Nancy Reagan.

-- The crusade against drug use is symbolized by three words the First Lady offered our children -- Just Say No. This crusade will prove to be one of the most significant investments ever made in the future of this nation.

-- Because knowledge and attitudes are the bedrock of behavior, we can be confident that the next generation will reject illegal drugs in record numbers.

o Today, however, a second, ominous trend appears to contradict the promise of recent gains and threatens to undermine the confidence of many Americans in our progress against illegal drugs. There has been a surge in drug-related crimes, deaths by overdose and by AIDS, which can be contracted through IV drug use, births of drug-addicted and drug-impaired babies, and even the destabilization of national governments by traffickers in drug-producing countries. All this is viewed by some as signs we have lost our struggle against drugs.

-- These problems reflect the long-term consequences of the myth that illegal drug use is glamorous, harmless, or victimless.

-- U.S. law enforcement agencies have made an unprecedented response to the trafficking and sale of illegal drugs. Yet a persistent demand for drugs is served by seemingly limitless supplies. It is increasingly evident that enforcement, while necessary, is at best only half of a required two-prong attack against illicit use of drugs.

<u>The Problem</u>

o The major obstacle to the elimination of illicit drugs from our society is the unwillingness or inability of current drug users to give up their habits. Their demand is increasing the supply of illegal drugs here, while at the same time foreign demand for drugs is increasing the supply abroad.

-- Much of the contemporary demand for illegal drugs is driven by people between the ages of 20 and 40 who began using drugs in the 1960s and 1970s. Their continued use today supports a vast underground market in illegal drugs that is as expensive as it is deadly.

-- One segment of the youthful population has not heard or responded to the Just Say No message. They are the school dropouts and those who have missed or rejected educational messages. They have placed themselves, their peers, and their communities at high risk for their illegal drug use.

-- Unchecked, these users threaten to undercut the very real gains we have made against illegal drugs.

o Anyone who silently consents to illicit drug use jeopardizes the progress we must make to reduce, and ultimately to eliminate, drug use.

-- America can no longer excuse drug users. Misdirected compassion, or even understanding without action to stop drug use, makes continued illegal use of drugs possible.

-- We must become so intolerant of drug use that the habit is unacceptable anywhere.

-- Even knowledge about the drug abuse problem is not enough. Nothing will happen unless action, including legal action, is taken to stop drug use; and a variety of actions may be needed. To be effective, these actions will have to be forceful and swift: fines; seizure of property; forfeiture of driving and other privileges; drug screening; compulsory work within the community; mandatory education; or even jail offer a range of actions targeted on the user.

Seeking a Solution

- o There is no one approach that will solve our drug problems, or win the crusade against drug use.

- o For seven years, this administration has had a comprehensive strategy to combat drug use: international eradication, interdiction, and enforcement programs; along with treatment, education, and prevention efforts. Today, almost every American acknowledges that a comprehensive strategy is the best approach.

- o Prevention and education are essential elements in the strategy. The next, and more difficult step, is to demand that users of illegal drugs be held accountable for the damage they do to themselves, to their families and to society.

- o Citizens across the country, in every community, in every family, in every setting, are challenged to make their individual contributions to the future by taking action now to stop the user and the use of illegal drugs.

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Sue
WH Ceremony

One Hundredth Congress of the United States of America

AT THE SECOND SESSION

Begun and held at the City of Washington on Monday, the twenty-fifth day of January, one thousand nine hundred and eighty-eight

Joint Resolution

To designate October 24 through October 30, 1988, as "Drug Free America Week".

Whereas illicit drug and alcohol abuse has reached epidemic proportions and is of major concern to all Americans;

Whereas illegal drug and alcohol use is a major public health threat and is one of the largest causes of preventable disease, disability, and death in the United States today;

Whereas drug and alcohol abuse cost American society nearly $100,000,000,000 a year in lost productivity;

Whereas illegal drug use does not discriminate on the basis of age, gender, or socioeconomic status as evidenced by the following statistics:

(1) twenty-three million Americans age twelve and over currently use illicit drugs,

(2) a nationwide Weekly Reader survey revealed that of the sixty-eight thousand fourth graders polled, 34 per centum reported peer pressure to try wine coolers, 41 per centum to smoke, and 24 per centum to use crack or cocaine,

(3) the fifteen-to-twenty-four-year-old age group is dying at a faster rate than any other age group because of accidents, homicides, and suicides, much of which is related to drug and alcohol abuse;

Whereas the problem is not insurmountable. Americans have begun to lay the foundation; however, we must continue to build on the important strides we have made in our efforts to prevent illegal drug and alcohol use. The most recent national polls reveal that progress has been made—

(1) since 1979, there has been a steady decline in the use of marijuana on a daily basis among high school seniors, and in 1987, marijuana use among this group was at its lowest level in eleven years,

(2) in 1987 there was a significant drop in the use of cocaine, and the number of high school seniors associating great risk with trying cocaine once or twice rose from 34 per centum in 1986 to 48 per centum in 1987, and

(3) illicit use of stimulants and sedatives continues to decline among high school seniors, college students, and young adults in general;

Whereas the American people indicate that drug abuse is one of the most serious domestic problems facing this Nation according to public opinion polls and have begun to take steps to fight it;

Whereas the National Federation of Parents for Drug-Free Youth has declared October 23 through October 30, 1988, as "National Red Ribbon Week"—a comprehensive public education and fund-raising drive, involving thousands of parent groups across the country;

Whereas other outstanding groups such as the American Council for Drug Education, the Just Say No Foundation, the National Parents Resource Institute for Drug Education, TARGET, the National Crime Prevention Council, the Elks, and others have demonstrated leadership, creativity, and determination in achieving a drug-free America;

Whereas we must get the message across that any use of an illegal drug is unacceptable—that there is no safe use of these drugs—and that illegal drug use will not be tolerated;

Whereas drug and alcohol abuse undermines our economy, threatens our national security, affects productivity, and ruins and destroys lives: Now, therefore, be it

Resolved by the Senate and House of Representatives of the United States of America in Congress assembled, That the week of October 24 through October 30, 1988, be designated as "Drug Free America Week". The Senate of the United States recognizes and commends the hard work and dedication of concerned parents, educators, business leaders, private sector organizations, and government leaders and urges them to continue their tenacious efforts. The Senate urges these groups to sponsor town meetings, conferences, and fundraising activities that support community drug and alcohol education and to observe "Drug Free America Week" with other appropriate activities, events, and educational campaigns.

SEC. 2. Every American is encouraged to wear red during the "Drug Free America Week" to symbolize their commitment to a healthy, drug-free lifestyle.

Speaker of the House of Representatives.

Vice President of the United States and
President of the Senate.

NATIONAL CAMPAIGN FOR A

drug free

AMERICA

FUNDRAISING FOR COMMUNITIES

"WHAT WORKS"

This manual was prepared for use by the thousands of concerned citizens who have organized efforts to make their communities a more healthy, productive and happy place in which to live. It is our hope at the Office of the National Campaign for a Drug Free America that it will serve as a useful tool to raise funds to expand existing programs and to establish new, community-based preventions efforts. We wish you well in your efforts to promote and sustain a Drug Free America.

Angie Hammock
Director,
The National
Campaign for a
Drug Free America

NATIONAL DRUG FREE AMERICA WEEK
OCTOBER 24 – 30, 1988

ROCKVILLE, MD 20857 ★ 301·443·0606

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The manual was written by the American Council for Drug Education. Kathleen Curtis was the principal analyst and author. Trina Brugger contributed her talents in writing the public relations section and reviewing the entire manuscript. Anita Hartman was an able researcher and Anita Hetzer and Joyce Kisner were invaluable in their ability to decipher handwriting and meet deadlines.

We want to thank all the generous people who shared their time and experience with us as we explored the world of fundraising. With their skill and enthusiasm, it is clear why the third sector is alive and thriving today.

Lee I. Dogoloff
Executive Director
American Council for Drug Education

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INTRODUCTION

Drug abuse, alcoholism and mental health are issues that face every community in our country. Throughout the nation, individuals have joined together in groups -- small and large, local and national -- to solve these problems. They all have a common cause.

They also have a common need -- to raise enough money to support the programs they offer. This manual is a guide for the staff and volunteers charged with raising that money. It is designed in a series of steps from organizing for success to evaluating how successful they are. Other books on this subject may differ in their presentation of the information but the basics are the same.

There is no magic in fundraising. Above all, you need to be a good planner, organizer, manager, and marketer. When you combine these skills with your own enthusiasm and common sense, you will be successful.

Many good resources already exist on this subject and a list of some of these resources is included in this book.

A few terms that will be used throughout this manual may need some explanation, especially those that are used interchangeably.

Development and Fundraising: Both are terms used to denote the programs designed to acquire money and other resources to support a nonprofit group.

Board of Directors and Trustees: These are terms used to describe the people who are responsible for directing and overseeing the nonprofit group. They are also the principal fundraisers.

Resources: Money, people, products and services are all available in your own community to offer you support. You need to assess them all to be truly successful.

Annual Campaign: The annual campaign is the program to raise money for operating expenses to pay for your programs and your support functions. A well-planned and well-executed annual campaign will approach all funding resources through a variety of appropriate activities. These include personal solicitation, direct mail, proposal writing, special events, matching funds programs and federated programs such as the United Way of America and the Combined Federal Campaign. The annual campaign is the main focus of this manual.

Capital Campaign: A capital campaign seeks funding for major undertakings or expansions such as real estate purchases, new buildings and major pieces of equipment. Funding for an endowment to pay for the on-going maintenance of this real property is often a component of a capital campaign as well. Effective campaigns are well organized with high profile community leadership and often involve professional development consultants. Contributions are solicited over a set period of time from individuals, corporations and foundations. Effective publicity is an integral part of a capital campaign. A capital campaign does not replace the annual campaign; they run concurrently.

Planned Gifts: Planned gifts are donations made through wills, trusts, gift annuities, life insurance, securities, and real estate. Planned gifts are sometimes called deferred gifts because they are often received after the donor's death. However, not all planned gifts are deferred. Each kind of donation has its own advantages based on current tax laws and the individual donor's needs. A full scale planned giving program needs expert management in estate planning, the law, taxes, and investments and can be expensive to staff and to operate. Some organizations limit their acceptance of such gifts to those obtained through wills thus limiting the cost to themselves. While planned giving can result in substantial donations to your group, it is also a complex subject that requires extensive research before getting involved. There are several national firms that specialize in planned giving and offer workshops, literature and on-site consultation.

BEFORE YOU GET STARTED

Before you ask for your first donation, you need to be able to answer "yes" to a few questions.

1. Do you have 501(c)(3) tax-exempt status?

2. Do you have a board of directors?

3. Do you have a lawyer and an accountant who will volunteer their help when you need it?

4. Do you have a clearly articulated mission statement or goal that is accepted by your staff and volunteers?

5. Do you have one person who is specifically charged with the job of raising money for your group?

Once you answer "yes" to all these, you are ready to get started.

A successful fundraising program requires pre-planning and well-organized execution. Generally, it is not something that can be done well in response to a crisis. Designate someone as your chief fundraiser who may be a paid staff member, a trustee or another volunteer. Give that person the authority and the responsibility to represent your cause and to raise the money you need to fund your program. Provide the clerical and other kinds of support he or she needs to get started and do not expect instant results.

Building up your group's credibility in the community takes time and that is the basis for a successful development program. People must be aware of you and have a positive impression of what you do and how you manage your resources before they will support you.

As you read through this manual, remember that you and your volunteers know your community better than anyone else does. You know what your volunteers can do and you have many creative, imaginative ideas of your own. You also know what resources your community has -- the people, companies and civic groups that can help you reach your goals.

The material in this manual is organized in a series of six steps to help you make friends and raise money for your cause.

Step 1: Set program goals.

Step 2: Assess your financial and personnel needs.

Step 3: Inventory all your resources.

Step 4: Develop a fundraising plan.

Step 5: Implement fundraising activities.

Step 6: Evaluate your results.

How complex or how simple these steps will be depends on the characteristics of your group. The size of your group, the range of your programs, whether you have paid staff or are all volunteers, how well-known or brand-new your group is, and whether you are local or national -- all these factors will impact the way you implement the steps.

Since no two groups are exactly alike, the discussion of the steps may not cover every detail that will arise in your particular situation. Use these steps as the outline for your actions and use your own creativity to make them fit your needs.

Remember, fundraising starts with F-U-N.

Make a plan, set your eyes on your goal, keep your enthusiasm up and you can't miss!

Good luck.

STEP ONE: SET YOUR PROGRAM GOALS

In the previous section, you answered "yes" to the question: "Do you have a clearly articulated mission statement or goal that is accepted by your staff and volunteers?" Now you need to ...

- o develop objectives to reach that goal.
- o plan the methods you will use to reach those objectives.
- o design specific activities to carry out the methods.
- o calculate the financial and personnel resources needed to complete the activities.

Your development goal grows out of your program goal. Fundraising does not exist by itself -- it is clearly tied to the program goals you have set for your group. The total of all the financial and personnel resources you need to reach those program goals is your development goal. How to reach your development goal is the subject of this manual.

For example, if your program goal is to provide a drug and alcohol free prom night, a simple action plan could look like this. (Action steps are included for only Method #1 under Objective #1 in this simplified example.)

GOAL: A drug-free and alcohol-free prom evening for all students

OBJECTIVE #1: Coordinate school personnel, parents and students into a cohesive group on this issue

METHOD #1: Hold meetings with representatives of each group

ACTION #1: Arrange a location

ACTION #2: Issue invitations by phone

ACTION #3: Prepare agenda and copies for all attendees and mail five (5) working days ahead of time

ACTION #4: Hold meetings and mail notes to everyone invited -- whether they came or not

METHOD #2: Design and agree upon prom night plans and sanctions for inappropriate behavior

OBJECTIVE #2: Raise awareness of parents about possible drug and alcohol problems connected with the prom and gain their support

METHOD #1: Hold a meeting of parents whose children are eligible to go to the prom

METHOD #2: Send letters to parents of same after the meeting

OBJECTIVE #3: Raise awareness of students about drug and alcohol use, sanctions to be imposed if use occurs and gain their cooperation

METHOD #1: Hold a school assembly

METHOD #2: Discuss in homerooms

METHOD #3: Sign a pledge

METHOD #4: Implement promotional campaign to educate students

OBJECTIVE #4: Provide drug-free and alcohol-free prom night activities

METHOD #1: Help students plan pre- and post-prom activities that exclude alcohol and drugs

METHOD #2: Provide adult supervision of all prom night activities

METHOD #3: Meet with student representatives and manager of prom location to discuss acceptable behavior by students and what is expected of the hotel staff (i.e. no alcohol served to prom guests)

OBJECTIVE #5: Evaluate the success of your program

METHOD #1: Meet with students and discuss what happened

METHOD #2:	Encourage students to write down their suggestions for next year's prom
METHOD #3:	Survey parents by mail for their reactions
METHOD #4:	Publish results of student and parent surveys and give to both groups

Your development goal is the total of all the resources you need to complete the activities you designed to reach the program goal. The fundraising activities that you do to reach your development goal are the means to an end. They are not the central focus of your group but they must be well-planned and executed to enable you to raise the money that you need to fund your program.

STEP TWO: ASSESS YOUR NEEDS

Decide what you need in people, money, services, and products to reach your development goal. Following is a list of the various needs identified in the previous example.

- meeting places
- telephone
- volunteers
- typewriter or word processor
- make copies of agenda
- postage
- artwork for pledges
- beverages and food for pre-party and post-party
- locations for pre- and post-parties
- printing pledge cards, posters, etc., to promote drug and alcohol free evening

Many of these items can be donated -- such as meeting rooms and typewriters. But others, such as postage, must be paid for in cash.

Groups with other goals might need office equipment, cars, vans, busses, brochures printed, materials distributed, press releases written, or a product sold. Your needs will vary depending upon the goals of the program you offer.

STEP THREE: INVENTORY YOUR RESOURCES

Review all the people and places in your community who might be able to help you. The following list suggests some of the resources that are available. Have a brainstorming session with key staff and volunteers and make up a specific list of names.

Individuals
Businesses
Civic Organizations
Religious Organizations
Political Organizations
Foundations
Governments
Schools/Colleges/Universities
Unions
Professional Organizations
Media
Other NonProfits

People are your key resource -- whether they are staff or volunteers or donors (and some belong to more than one category). Your challenge is to decide how to effectively involve the best people in your cause. People make the decisions about donating the time, money, products and services that you need. When you develop this key resource, the others will follow more easily. People give to people and your efforts will be more successful if your donors are approached by someone they know and respect.

VOLUNTEERS

Today's volunteer can be anyone: student, busy homemaker, unemployed person, or business executive to name only a few. Volunteers know that their time is valuable and they want to fill a real role in your group. They may want an opportunity to grow -- to develop a new skill. Some may be seeking professional contacts or unpaid experience in a new field. You need to know what opportunities you can really offer a volunteer, and be sure to be open minded. Sometimes a person new to your group can see opportunities that you have missed.

Volunteers can fill many roles, such as:

- Board members
- Director and staff members
- Advisory committee members
- Fundraisers
- Consultants
- Interns
- Professional services such as law and accounting
- Program delivery volunteers

Be creative in assessing your needs and in locating the right people to fill them. Talk to people who know your community well about who they think can help you. Talk to such people as your minister or rabbi or priest, your bank president, the president of Junior League, your Chamber of Commerce, your lawyer, and your accountant. If five or ten of your group's members talk to these people, you will have a long list of potential volunteers. Some names will appear on everyone's list and those are your "hot prospects."

How else can you let people know about the volunteer opportunities you have? You can contact the Volunteer Center in your area, many of which are run by your local United Way. Even if your United Way does not run the Volunteer Center, they can tell you who does. They can help match up your needs with the people who contact them looking for a place to volunteer.

Newspapers often carry a weekly column of volunteer opportunities. Call the paper, ask to speak to the person in charge of the column, and find out what you have to do to get included. You will probably have to fill in a form or write a short description of your group and your need for volunteers. Be sure to include the specific name of someone in your group and his or her daytime phone number.

Every time you speak to a civic group or church membership or anywhere, mention how involved volunteers are in your organization. Talk about the current volunteer opportunities you have open. Remember, people do not know what you need until you tell them.

Earlier in this manual, you said "yes" to the question "Do you have a board of directors?". Now is the time to evaluate whether you have the right people on your board to be your chief fundraisers. Good fundraisers are upbeat and enthusiastic believers in your cause and they are not afraid to ask for money, volunteers and the other things you need to support your program. In many ways, your trustees are the chief salespeople for your group.

The best situation is a board whose members will all seek financial support for your group. Some will be more aggressive than others, but everyone can do something for the cause they represent.

If your board members are unwilling or unable to be effective fundraisers, you have some options to consider.

1. Replace current members.

2. Add more members.

3. Recruit a "Development Council" whose members are responsible only for raising money and are not members of your board.

Board members who are unwilling to ask for money, may like the Development Council option. That really should be a temporary solution, however. While the Council members raise your money, you should be replacing board members or adding new ones to the board who will do their share. Your board policies should include a section on financial obligations. You must be clear about this when recruiting new members.

An equally important role of the board member is to make a personal contribution. The size of the gifts will vary according to the individuals' ability to contribute, but everyone must be willing to give something. Staff members should be encouraged to donate also. A membership campaign is often a good vehicle for generating board and staff support.

Remember, it will impress prospective funders if you can tell them that every board member is also a donor to your group. It is difficult to explain to a prospect why he or she should contribute when your own board members will not do so.

MONEY

People are your key resource, but not the only one. The obvious focus of most development attention is money. Money, however, does not donate itself. People donate money -- they are the key.

In 1987, $93.68 billion was donated to nonprofit groups in the U.S. Individuals gave 88.4% of the total, foundations 6.8% and corporations the remaining 4.8%. (Figures are from Giving USA, published by the American Association of Fund-Raising Counsel Trust for Philanthropy.)

However, donations are not the only source of money for a non-profit. A more complete list includes:

- better money management within your group (deposit checks every day and pay bills on time to take advantage of discounts)
- fees for services you provide
- product sales
- endowment income (solicit money that is then invested, not spent, and draw only on the interest to fund your programs)
- traditional fundraising methods:
  - Membership dues
  - Personal solicitation
  - Direct mail
  - Canisters in restaurants or stores
  - Payroll deduction
  - Matching gifts
  - Federated groups
  - Memorial giving
  - Grantsmanship

- Special events
- Planned giving
- Capital campaigns

IN-KIND DONATIONS

In addition to people and money, you should also look for direct donations of the products you need. The most obvious are office equipment and supplies but many other items, new and used, can be yours for the asking.

land
buildings
rooms for meetings or storage
cars or other vehicles
items for auction from celebrities and others
prizes for fundraising events
flowers
computer hardware or software
overstock items from a manufacturer or retailer
out-of-season items
beverages and food for meetings or events
telephone banks for phonathons
TV or radio studio time to tape PSA's

Be sure to check out the current IRS rules on evaluating these in-kind contributions. In-kind donations are different from those of cash or time in one major way: the prime motivator for donating a product is often the tax deduction available to the donor. You need to know the tax rules before you get started. Ask your accountant or lawyer -- who should be donating their services! -- to review the law.

It helps to be a creative scavenger when you are looking for donations of products. But, even if you do not get what you ask for this time, you are expanding your access to possible resources for future requests.

SERVICES

Donated services can be a major source of non-cash support. Corporations are the obvious donors but anyone who has a skill that you need is a potential resource to be tapped.

Do not assume that a person or company has only the skill for which they are paid. An accountant can be a calligrapher and a lawyer might like to share his or her public speaking skill on your behalf. Be creative -- ask them what they would like to do and match that with what you need.

Here are some suggestions of services that can be donated.

- Audio-Visual: Students or professionals can take pictures or videos and edit them into a slide or video presentation.

- Computers: A local company could give you computer time and storage space for your mailings.

- Investments: A stock broker or private investor could counsel you on investing your group's assets.

- Loans: An individual or company could loan you money at low, or no, interest.

- Planning and Goal Setting: Organizational development professionals can meet with your staff and trustees to help clarify your mission and how you will plan and execute your plans to meet it.

- Professional Services: Accountants and lawyers should serve on your board and offer their services for no cost.

- Public Relations: Professionals can write your brochures, newsletters, news releases, slide presentation script or public service announcements.

- Purchasing: A company could place your smaller order for office supplies along with its own so you could take advantage of a quantity discount.

- Transportation: A church or other organization could loan you their busses for your trips.

Free or low cost assistance in technical areas is available from some nonprofit organizations as well as from companies. See the Resource List in this manual for some suggestions.

When you decide to ask someone to donate their services, remember that it may take longer for the job to be done than if you paid for the service. If time is a critical element, explain that to your volunteer so he or she can decide if they can do what you need in your time frame.

STEP FOUR: THE ANNUAL CAMPAIGN

The fundraising plan is often called a "campaign". A development campaign is similar in many ways to a political campaign.

- Both have a goal.
- Both are limited by time.
- Both have heavy volunteer involvement.
- Both use a variety of techniques to generate support.
- Both are pursued in support of a cause.

The term "campaign" also conveys a sense of urgency that can be helpful in motivating both donors and volunteers.

The ultimate goal of a development program is to enable the group to become self-sufficient through the year-round receipt of income from an array of sources. An organization such as yours has three broad areas of funding available to help you reach financial self-sufficiency. The annual giving program, deferred/planned gifts and capital gifts are all components of a truly complete development program. The focus of this manual is the annual campaign.

A well-structured annual campaign includes the use of as many fundraising techniques as are necessary to move toward that ultimate goal.

We will discuss several specific fundraising techniques.

- o Personal solicitation.
- o Direct mail.
- o Foundation grantsmanship.
- o Government grants writing.
- o Special events.
- o Federated organizations.
- o Matching gifts.

It may not be possible to reach your ultimate goal of self-sufficiency in only one year. You probably need to define interim goals which you can reasonably expect to meet and which move you closer to self-sufficiency. These interim goals provide the "success stories" you need to convince prospective funders that your group is worthy of support. Most people who donate large amounts prefer to fund well-managed, successful programs. Setting and meeting reasonable goals give you the credibility you need to get money for additional programs.

Several factors, which are under your control, greatly influence whether you will reach self-sufficiency. These are:

1. the visibility of your group in your funding community
2. the maximum involvement of effective volunteers and
3. the level to which you personalize your approach to prospective donors.

Let us look at a fictitious local group called EDUCATE that was started two years ago. (This is a simplistic example.) Their program goal is to wipe out drug and alcohol use among high school students in their community within five years. Their primary methods are education, peer support, and substance-free activities for teens. Currently, they are fully funded by local, state and federal grants totaling $25,000 a year. Their development goal is to raise up to $100,000 a year, reduce their reliance on the government grants, and become self-sufficient through community support.

After analyzing their program, the board and staff decided that to reach their goal of drug free teens, they need to do several things.

1. Convert part-time staff to full time Executive Director.

2. Hire additional staff.

3. Recruit and train more adult volunteers.

4. Recruit and train more teen volunteers.

5. Educate the general public about the issue and EDUCATE through an increased number of speaking engagements and media contacts.

6. Strengthen their working relationship with the school districts.

7. Network with local, state, regional and national organizations who can help them.

8. Raise more money from community sources up to the five year goal of $100,000.

To reach their development goal, they set the following interim goals.

Now: Funded by $25,000 in grants
New: Raise $5,000 from other sources

Year 1: Receive $25,000 in grants
Raise $15,000 from other sources

Year 2: Receive $15,000 in grants
Raise $40,000 from other sources

Year 3: Receive $15,000 in grants
Raise $60,000 from other sources

Year 4: Receive $15,000 in grants
Raise $85,000 from other sources

Year 5: Raise $100,000 from sources other than the original grants

Next they reviewed the range of fundraising projects and decided which they could do with their existing staff and volunteers and which required more resources than they currently have. They decided that they have enough resources to raise the first $5,000 in a series of volunteer-intensive activities.

- They planned small, low-cost special events such as city-wide car washes every weekend for a month, bake sales in shopping areas, a spaghetti dinner, etc.
- They increased the number of speaking engagements at civic groups and churches and requested contributions from each of them.
- They contacted the local United Way to find out how they could qualify for funding under programs such as the donor option plan or new venture grants.
- Since there are federal offices in the area, they also applied to be included in the program to solicit federal employees at their workplaces, the Combined Federal Campaign.
- They started an annual membership drive through their quarterly newsletter.
- They started to research foundations and corporate foundations that would be interested in EDUCATE's programs.
- They continuously recruited new teen and adult volunteers for their programs and their fundraising activities.

Their plans for future years include additional projects and expansion of those already started.

Year 1: Receive a grant from a non-government source.
Recruit two civic, service, or church groups to do benefit events.
Continue successful small events with EDUCATE volunteers.
Increase memberships through personal solicitation by board members.

Year 2: Receive two or more grants from non-government sources.
Solicit corporate funding through contacts by board members.
Expand benefit events.
Continue EDUCATE volunteer events.
Increase membership through the addition of higher level gift clubs.
Celebrate five year anniversary with a testimonial fundraising dinner or other formal event.

Years 3 & 4: Increase income from all sources through the recruitment of new volunteers and the addition of staff as needed.
Add a membership mailing.

Year 5: Celebrate your success! Hold a gala event to establish an endowment to fund community action programs that work with teens!

There is no magic involved in formulating a development plan. The skills needed by a good fundraiser are those of planning, organization, management, and marketing. Add to these enthusiasm and common sense and you have the recipe for success.

THE ANNUAL PLAN

Plan your development campaign for at least a full year at a time. You really should have a written five year plan that is reevaluated and modified as needed but will make you focus on where your programs are going and how you will get the money to support them.

The annual plan for a group whose goal is keeping teenagers drug free through a series of drug and alcohol free activities could look like this.

Annual Plan: Fundraising

Nov. Bowl-a-thon: Meet with alley manager to plan President's Day event; ask him/her to donate food and drinks.
10K Race: Submit it to jogger's calendar (some are done 6-12 months in advance).
Speak to a group and request donations.

Dec. Bowl-a-thon: Design flyer for bowlers, pledge sheets, posters, instructions for team captains, prizes, imprinted pencils to give away; recruit businesses to print these items; recruit Drug Free America Clubs to participate and have each appoint a team captain.
Speak to a group and request donations.

Jan. Bowl-a-thon: Recruit a company to donate food and drinks; teens get pledges.
Drug Free America Walk and Rally: Recruit corporate sponsors for transportation, food and drinks, t-shirts, caps, buttons, banners, printing posters and flyers.
Mail newsletter.
Speak to a group and request donations.

Feb. Bowl-a-thon: One week before checklist: phone calls to food and drink donors, alley manager, team captains (could have a meeting at the alley), printer of the pencils, prize suppliers; get money bags from your bank; on President's Day supervise the event; within one week teens collect pledges and turn money into the team captains, who turn in money to the person who puts it in the bank; within three weeks hold an evaluation/wrap-up meeting and discuss what went well and what improvements should be made the next time; mail a "thank you"/success report to donors and the alley manager.
Speak to a group and request donations.
Supervise a series of bake sales done by a civic group.

Mar. Drug Free America Walk and Rally: Submit feature story proposal to newspaper to print in May; order all printed materials.
Prom: Recruit corporate sponsors for food, drink and location.
Speak to a group and request donations.

Apr. Drug Free America Walk and Rally: Finalize transportation and refreshment plans; contact Red Cross for first aid support.
Mail newsletter.
Speak to a group and request donations.

Supervise city-wide car washes done by Boy Scouts and Girl Scouts.

May Drug Free America Walk and Rally: Mail news releases to media; do the event; your feature story appears.
10K Race: Recruit chairperson.
Speak to a group and request donations.

Jun. Prom: Hold pre- and post-parties; have an evaluation/ wrap-up meeting and discuss how it went; mail "thank you"/success report letters to donors and volunteers.
10K Race: Recruit and meet with committee chairs.
Speak to a group and request donations.

Jul. Meet to evaluate the year's development campaign; set goals for next year.
10K Race: Design posters, entry forms, flyers, banners, receipts, t-shirts, trophies and prizes; recruit sponsors to print them; get permits from local governmental units such as police and health department; lay out the course; go to other races every weekend and hand out entry forms.
Membership: Decide to whom you are mailing and what package to mail; draft the letter and circulate for approval.
Mail newsletter.
Speak to a group and request donations.

Aug. 10K Race: Submit to media community calendars; distribute posters in store windows; contact school track teams; get an off-duty policeman to be your security guard; contact jogging clubs and mail sufficient entry forms to them.
Haunted House: Design and print tickets; recruit team captains in youth clubs to sell tickets; contact civic groups to publicize it among their members.
Speak to a group and request donations.

Sep. 10K Race: Submit press releases; arrange for drinks to be donated so you can sell them; one week before checklist: call businesses about donations, get electricity and cooler for the drinks, trophies and prizes, staff for registration table, money bags from bank; supervise the event; take money to the bank with the security guard; within two weeks hold an evaluation/wrap-up meeting; mail "thank you"/success letter to donors.

Membership: Put money on your postage meter or buy stamps; stuff envelopes, seal and stamp/meter them; take mailing to post office no more than one week after the 10K race.

Speak to a group and request donations.

Oct. Haunted House: Teens sell tickets; sponsored by radio station who publicizes it; send notice to community calendars.

Membership: Analyze results of four weeks.

Mail newsletter.

Speak to a group and request donations.

Nov. Haunted House: Arrange for a photograph when the radio station gives a check of the proceeds to you -- also photograph the teen who sold the most tickets and give him/her a prize; do a press release to the newspapers with the photographs; hold a wrap-up meeting with the radio station manager to evaluate the project; submit a written report to everyone involved.

Supervise a bake and craft "Holiday Sale" by a civic group.

Speak to a group and request donations.

Bowl-a-thon: Meet with alley manager to plan President's Day event; ask him/her to donate food and drinks.

10K Race: Submit the date to the jogger's calendar.

No matter what specific activities you do -- mailings, bowl-a-thon, bike race, gala event, etc. -- the planning concept is the same. You need to make month-by-month overall plans and then whoever is in charge of each event needs to break it down on a week by week level. Complex events require day-by-day plans.

Plan backwards! For instance, if you know that your printer takes six weeks to deliver and you need two weeks to stuff envelopes and your mail date is September 23, then you have to place the printing order by July 29.

Planning ahead of time and establishing who is responsible for doing what, will keep you from crisis situations. No one does their best in a crisis -- although some do better than others. Crisis situations are tense and stress provoking for everyone and are easily avoided if you lay your plans well and follow them through.

Before you start doing anything, review your plans and your materials. All of your printed pieces such as brochures must be ready ahead of time. Do not put yourself or your volunteers in the position of not having something basic that a prospective donor needs.

THE CAMPAIGN ORGANIZATION

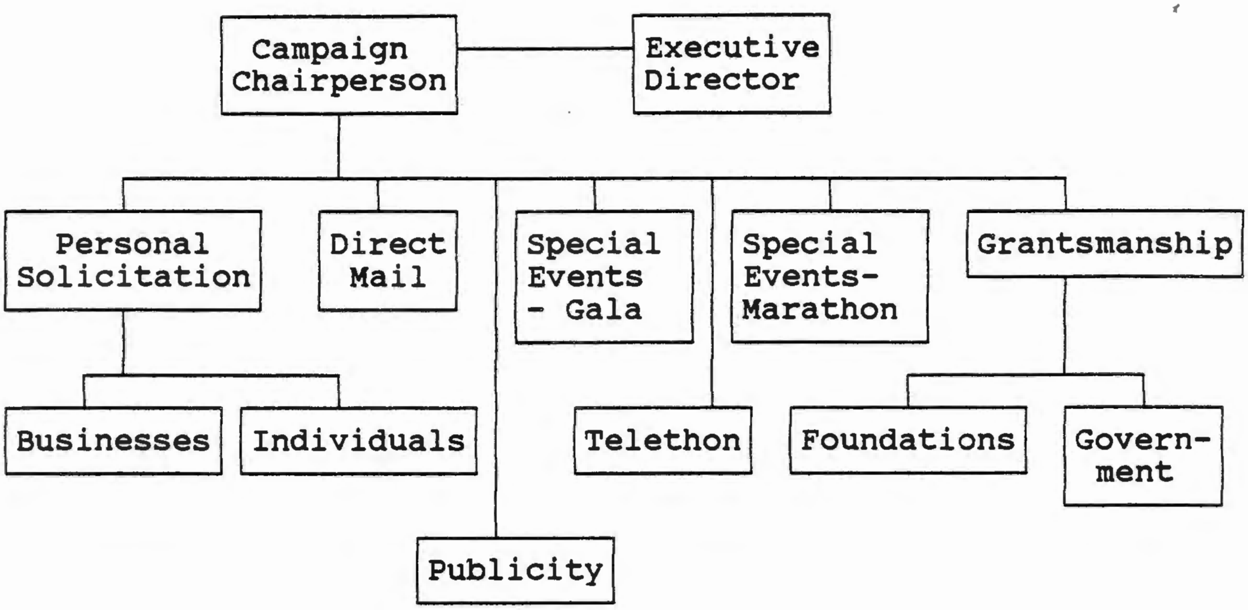
We have already mentioned some of the specific requirements for a successful development campaign.

- o Your board members recognize their role as the chief fundraisers and as financial contributors.
- o You have a clearly articulated mission statement.
- o You have an annual development goal which is the total needed to support all your programs.

We are going to plan a development campaign staffed by you as Executive Director and carried out primarily by volunteers. Your actual situation may not require such a formal or complex structure, but the basic concepts are generally applicable.

Your first task is to identify and recruit a campaign chairperson. He or she must be willing to devote time and energy to your cause. An equally important requirement is that your chairperson can recruit and motivate volunteers throughout the campaign. A powerful business or community leader will lend credibility to your cause and open doors to prospects that you may not be able to open on your own.

Your chairperson then recruits the other volunteers who will chair the committees. An organizational chart could look like this. Yours may be different because of the projects you choose.



Regardless of your basic committee structure, you should have a public relations chairperson. Whether or not this person requires the support of committee members, depends on what needs to be done. If the staff has already assembled all necessary written materials (such as the budget, brochures, donor cards for the solicitors, press releases, and media kits) only one or two people may be needed to review them. However, if the volunteers will be designing and writing all the pieces themselves, more volunteers are required. Your campaign chairperson probably knows several people in advertising, marketing, or public relations positions who could easily chair such a committee and recruit its members.

Basically, the volunteer portion of the development campaign has a pyramid structure. Each committee chair recruits committee members with whom he or she can work and on whom the chairperson can rely to get the jobs done.

The staff members play key roles in the annual campaign. The quality of their work directly impacts the willingness of volunteers to continue their involvement. One of the most diplomatic tasks is to keep the pressure on the volunteers to produce results while not offending anyone.

The staff is responsible for planning and conducting all the meetings and events and carrying out all the projects in a competent and professional manner. Accurate record-keeping, billing, and acknowledgment of gifts are vital staff responsibilities. Timely and accurate communications build a sense of confidence in your organization.

There are campaigns in which a chairperson is recruited for his or her influence and contacts in the community and is not expected to do any real work. In this case, the staff does all the work that an active chairperson would otherwise do.

One task that is best performed by you and one or two key volunteers is to review and segment your entire donor/prospect list. You need to decide which solicitation method you will use and what you will ask for from each one. You also want to be sure that a prospective donor is approached only once during any part of your campaign. It is very embarrassing for a volunteer solicitor to be told by the prospect that someone else has already asked him or her for a donation. If a request is turned down, you can consider another request later but be sure to keep straight who is asking whom and when.

Some prospects are capable of donating money, and time, and products, and services to your group. In most instances, you do not want to overburden the same people with repetitive requests so you need to decide ahead of time what project you want them to support. However, if they turn down one request, do not hesitate to approach them later for something else. You may be able to tell from their original rejection why they said no: wrong solicitor, wrong project, no interest in the cause, wrong time of year, etc. The only one of these that should stop you from making a second request is "no interest in the cause". Even then, if you have a volunteer who is sure he/she can get a gift without offending the prospect, you should do so.

For instance, you could contact your prospective corporate donors in many ways, such as:

1. by sending a volunteer known to a company's chief executive to ask for a cash contribution,

2. by having a volunteer call the chief executive and ask the company to donate one of its products for an auction.

3. by asking the company's marketing director to donate the design and production of your annual report, or

4. by sending an impersonal mail appeal signed by you asking for a cash contribution (this is the least effective method).

You need to decide which of these requests is most appropriate for the prospective donor and which response will most benefit your group.

Through this identification process, you are fitting each prospect and donor into the most appropriate solicitation category of your annual plan. Obviously, you want the largest gift they are capable of making, but that may not be the one with the highest dollar value. If this is a first time call and the prospect knows little or nothing about you, it may be best to ask for a smaller donation.

THE DEVELOPMENT OFFICE

The most important part of your development office is the people who work there. Not only must they be devoted to your cause, but they must also pay close attention to details and be able to keep confidential information to themselves. Development staff often have access to information about someone's financial, professional or marital status that is not known to the general public. To retain the donor's confidence, everyone involved must respect his or her privacy.

Since fundraising projects require the same office equipment as your program, you probably already have all the basics on hand. Once the basics are there, you can add some things that make it easier.

Basics:

1. Telephone line for your group. If you are sharing office space, be sure to have your own phone number.

2. Letterhead and envelopes with an identifiable name.

3. A way to put an appropriate message on all outgoing mail: a slug for your postage meter or a hand stamp.

4. A word processor and letter-quality printer (or a good ink jet or a laser printer).

5. A word-processing program appropriate for business use.

6. A file drawer for information on donors and prospects.

7. A manual record-keeping system to keep track of donors and their gifts: name, home address and phone number, spouse's name, business address and phone number, secretary's name, date and amount of each gift, how the gift was solicited, source of the name, date added to the mailing list, and any other information regarding their interest in your group (such as being volunteers). A simple system can be set up on a large card.

Smith, Joseph (Ann)
123 New Street
Anywhere, USA 00000
000-555-1212

The Joseph Smith Co.
525 Main Street
Anywhere, USA 00000
000-555-2121
(Pres. & CEO)
Secretary: Mary Jones

Source: Friend of Jack Brown

DATE	AMOUNT	OTHER
12/02/86	--	Date added to mailing list
12/02/86	$100	Year-end appeal (by Mary Jones)
05/01/87	$100	Project Prom (by letter)
10/15/87	--	Co-chairs of testimonial dinner committee
12/15/87	$250	Year-end appeal (by Mary Jones)
03/01/88	--	Asked them to chair fall dinner - no response

Enhancements:

1. An appropriate logo that can be printed on all letterhead, envelopes, posters, brochures, invitations, etc.

2. A computer.

3. Data base management software.

4. A volunteer programmer to set up a computerized donor record-keeping system, write a procedures manual and train your staff.

5. Additional file space.

Computers are necessary for a group that has more than 100 donors and a development campaign of more than one project. Computers help you handle routine clerical tasks more efficiently and do technical tasks. Most importantly, they free people to provide your programs and raise the money you need.

GIFT CLUBS

Many organizations set up "gift clubs" for donors who give at specific higher than average levels. Individuals can join the American Cancer Society's Excalibur Club, for example, with a $10,000 gift or become a lifetime member for $100,000. The Society's Corporate Circle of Hope fulfills the same role for businesses. People like the idea of belonging to an exclusive group with people they regard as their peers.

Gift clubs can start at any level that constitutes an above average gift for your group. A Century Club for $100 annual donors is a fairly common lowest level club.

You should assign names to your clubs to make them more easily marketable.

- Use names that have a special meaning for your group like the Cancer Society's Circle of Hope.
- Name the clubs after people who are strongly identified with your group. If possible, the person or his/her descendants should make the first gift at that level. Remember that you want someone with strong name identification so you do not spend years explaining who the person was.
- Use generic names such as The Trustees Circle, The Director's Club, The Century Club, or The Heritage Society.

Club members should receive some special benefits for their memberships in addition to the recognition by their peers. Benefits could include some or all of the following.

- Automatic annual membership.
- Periodic program updates from the Board President or the Executive Director.
- An annual non-fundraising dinner hosted by the Board President.
- A framed certificate or plaque or something else suitable for an office (such as a paperweight or pen and pencil desk set).

Be sure to keep your special benefits in line with the donations. The donor gave his or her money to support your cause, so do not spend too much of it on benefits. Know your donors and use your best judgement in deciding what benefits are appropriate.

You will need some promotional materials for your clubs. A brochure outlining all the levels is the most basic piece. An "invitation" that can be personalized and sent through the mail or handed to a prospect is a good second piece. This is particularly effective during the personal solicitation phase of your annual campaign.

Gift clubs are a useful fundraising tool. They are beneficial, however, only if they increase the number of donors at those levels. They take some extra time to conceive, build, and nurture, but can provide a steady source of growing income.

CONSULTANTS

At some point in your career as a fundraiser, you may think you need to hire a fundraising consultant.

They are especially helpful in capital campaigns when you need to raise a very large amount of money in a limited time. Generally, they are able to assess through a pre-campaign study, your community's willingness and ability to support your project.

Consultants are best employed as managers and providers of professional services. You and your volunteers are still the main fundraisers, although some consultants will do that as well.

Talk with other groups who have used consultants for a project like yours -- special event, capital campaign, direct mail -- and ask their opinions. You and your trustees should interview several consultants and evaluate their responses. Consider such things as:

- which of their employees will actually work with you,
- whether they have done a similar project; for whom; how much was raised,
- how expenses will be billed and what the overall cost of their services is,
- if they will give you a complete client list or selected references (which you should check), and
- whether they offer all the services you need.

Discuss how much they will charge you for their services. Some consultants charge a single fee for their professional services and their expenses (such as travel, telephone, hotels and meals). Others give you the two figures, for professional services and for expenses, separately. Be sure you know what they are giving you so you can compare all the bids accurately.

In any case, you should pay on a "fee-for-service" basis rather than have them keep a percentage of what you raise with their help. (This applies primarily to capital campaigns and personal solicitation appeals.) If your consultant takes a percentage, most of his/her income will come from the few big gifts that are solicited at the start of the campaign and then he/she may not give you as much help as you need to get the numerous small gifts necessary to complete your fund drive. You, however, need those smaller gifts so you can build on them for your future support.

To be sure you understand just what it is you are paying for, draw up a contract and have your lawyer review it. The Taft Group in Washington, D.C. publishes How to Hire the Right Fund Raising Consultant, which would be helpful if you are facing this decision.

TELEMARKETING

Nonprofit organizations have been asking their own volunteers to call past and current donors and request their support for many years. It is an accepted fundraising technique. There are also completely legitimate and honest telemarketing firms that can be hired to makes calls on behalf of a nonprofit group.

However, there are other companies, commonly known as "boiler-room operations" who use inappropriate tactics to raise money -- much of which does not ever get to the nonprofit involved.

In the past few years, various watchdog groups have developed or revised their regulations on charities. The National Association of Attorneys General wrote a model law for states in 1986 and many states have their own regulations you must follow. While the laws, guidelines and regulations are generally accepted, some telemarketers and nonprofits think they go too far and are overly restrictive.

You should be aware that using telemarketing by a professional firm can be an excellent decison or a very bad one. Check out any firm thoroughly before you get involved.

STEP FIVE: IMPLEMENT FUNDRAISING ACTIVITIES

A fully developed fundraising program uses all the appropriate techniques to raise money. The chief development staffer must decide where to put the most effort to support the organization's programs. New programs are best funded by one or two large gifts from foundations or corporations. Programs that do not have new components are more easily funded through a variety of annual campaign activities, such as a membership drive and special events. Your development activities must be planned to support your programs.

Some fundraisers tend to focus on just one activity: renewal of a government grant, one corporate sponsor, one private foundation, or one special event. While this may be the easiest way to survive in your group's early days, you should start to broaden your base of support as soon as you can for several reasons.

- Government funding patterns change.
- Corporate contributions fluctuate with their profits.
- Foundations prefer to give start up money rather than funding on-going operating expenses.
- Major special events are a lot of work and can become stale over time.

Consider recruiting civic groups to do benefits for you: car washes, bake sales, a dance, a spaghetti dinner or fish fry. Not only do they raise money for you, but you have a great chance to educate them about the drug, alcohol or mental health problem in their community and how you are working to solve it -- with their help.

Plan an annual membership drive, starting with you and your trustees. Set the levels at realistic dollar amounts but not below $10.00, except for a youth membership. Memberships can be difficult to upgrade unless you can offer substantial benefits and most people join at the lowest level. Be sure your lowest level covers the cost of the benefits and gives you some money for your program.

Encourage your board members to talk to friends and business associates who are bank trust officers and lawyers and CPA's about your group's need for funding. These professionals have access to people who could be interested in supporting you.

Develop a 10 to 15 minute slide or videotape presentation that you can use at speaking engagements. Videotape activities that your clients are involved in: rallies, walks for Drug-Free America, car washes, alcohol-free parties and any other activities that show what the program really accomplishes. Recruit some of the teens to talk while the tape is shown. Let their enthusiasm kindle a response in the audience. Reinforcing your words with pictures makes it more likely that your audience will remember what you do and be favorably disposed toward your cause. People are more likely to offer their support when they can actually see what you are accomplishing. When people ask what they can do to help, be sure you have a specific answer.

Always carry brochures with you and membership applications (if the form is not part of the brochure) and hand them out. Keep a notebook handy so you can write down names and phone numbers of people who really want to get involved. Contact them as soon as possible and decide how they can best make a contribution to the cause.

It may seem like a poor use of the limited time you have to be "broadening the base of your support" with a lot of small gifts. From those donors of small gifts, however, will come the commitment to your cause which leads to the major gifts of tomorrow. For most people, the first gift they give is the smallest. Cultivate their interest and their financial commitment will increase.

There are several specific techniques fundraisers use to solicit money from a full range of resources. We will discuss personal solicitation, direct mail, special events, federated groups, matching gifts, and grantsmanship.

PERSONAL SOLICITATION

When you designed your overall annual campaign, you selected some of your prospects and donors to be solicited in face-to-face meetings with solicitors. Personal solicitation is an integral part of your group's development campaign and the most effective way to raise the major gifts your organization needs. It has the added benefit of involving volunteers who will educate their friends and peers about your cause.

Individuals and businesses are most likely to make a substantial contribution if you ask them in person. (This does not include corporate foundations who fund through a proposal process.) It is easy for a prospect to ignore a letter or to not return a phone call, but when the executive is looking directly at one of his or her peers, it is harder to say "no".

The planning process began when you identified some of your donors and prospects as candidates for the personal approach. These are all people and companies who have the ability to make major contributions to your group. They are also the prime candidates for the gift clubs you set up.

The personal solicitation campaign is volunteer intensive and structured in a pyramid shape. The chairperson of your annual campaign may also be the best person to chair your personal solicitation drive. This focuses all the public attention on one key volunteer throughout the year and strengthens his or her identification with your group.

Once you have assembled your list of contacts to be made, you will subdivide them into logical groups which will be assigned to specific solicitors. You can segment your prospects into groups based on any one of several criteria and form a committee for each.

1. Committees can be organized by types of businesses such as law firms, CPA's, banks and other financial institutions, manufacturing, retail stores, restaurants, and service companies.

2. You can divide up your prospects by the size gift you are requesting: \$100-\$499, \$500-\$999, \$1,000-\$9,999, and \$10,000 or more. (Smaller gifts should be solicited by mail or other non-personal methods.)

3. You may want to group your prospects geographically so your solicitors are not running into each other as they all travel across the entire city.

LEADERSHIP GIFTS

Before you go any further, be sure your chairperson and committee chairs have given their gifts or, at least, pledged the amount of the gift they will give. Whoever recruited your chairperson, preferably you and a board member working as a team, certainly said that making a gift was part of his or her role as the leader of the campaign. It is the chairperson's job to solicit the committee chairs in the same way. It is not fair to get them involved in the campaign and then tell them the size gift you expect. As a general rule, no one should solicit a gift larger than the one he or she is giving.

This is also a good time to decide who is going to solicit your board members, and for how much. There are several options.

1. You or your board chairperson can talk about it at a board meeting, not mention specific amounts, and leave it up to each trustee to decide.

2. Your board chairperson can make personal calls and suggest amounts.

3. Their names can all go on the prospect list and be given to various solicitors like everyone else on the list.

In a capital campaign, the board is solicited first and asked to contribute a substantial portion of the total (even up to 20% or 40%). Their annual campaign contributions need not be that large, but they all must contribute as much as possible to lend credibility to your cause.

PROSPECTIVE DONORS

Your "prospect pool" includes not only past donors but non-donors as well. Board members, other volunteers and staff members should recommend people for the prospect list. Not everyone renews their gift, so you must constantly solicit new people to fund your programs.

Next you will examine your list of prospects. You and a core group of your volunteers -- bankers, lawyers, trust officers, life insurance executives -- must sit down and evaluate the giving potential of your prospects. Prior to the meeting, assemble all the information you have about each prospect, much of which is contained on the donor records you constructed earlier. You should add any recent information you have about gifts the prospect has made to other causes and who solicited those gifts. You may be surprised at how much your volunteers know about their peers.

Be sure that the members of this evaluation group are not on the list of those they evaluate. You and your campaign chair can handle them separately.

At the meeting, decide how much each prospect should be asked to contribute. Review the prospect's giving history and encourage input from the volunteers. Generally, if someone has given $100 to you in the past from a less personal request and has donated more to other causes, you should ask for more. A $250 request would not be out of line in this example. There are "natural giving levels" that you can use as guidelines. Most gifts will be $100, $250, $500, $1,000, $2500, $5000 and $10,000. This is an excellent time to encourage membership in your gift clubs, which are set up at those levels.

Some people are uncomfortable talking about others' financial ability to contribute. You should be sensitive to this but do not allow it to stop these evaluation meetings. If you hand out the basic information on each prospect at the start of the meeting, set a time limit for each evaluation, and state the topic to be covered, you will alleviate much of the "trespassing" feeling that some volunteers have. Also, be sure to collect all the data sheets you handed out before anyone leaves the room. This information must be handled in complete confidence.

Do not be afraid of offending someone when you ask for a larger gift. A prospect can always say "no" or give a lower amount but is often flattered that his or her peers think that so large a gift is feasible.

SOLICITORS

Choose the solicitor who is most likely to elicit the requested gift from the prospect. The more you know about a prospect -- friends, clubs, school background, political affiliation, church membership, professional life, spouse's affiliations -- the better able you are to match the prospect with a suitable solicitor. Generally, each volunteer can solicit from three to ten prospective donors. The best solicitor of a large gift is someone who has already donated at least that amount to your campaign.

Prospective donors sometimes do ask the solicitor how much he or she has given before making their own commitment. A negative response from the volunteer may generate an equally negative one from the prospect. Be sure that each volunteer has some "easy" prospects. It is good planning to see them first and build up confidence for the more difficult ones still on the list.

Assess the peer relationships of your prospects and solicitors. An effective solicitor is someone who is perceived by the prospect as an equal in their relationship. For example, a partner in a law firm is more likely to respond to a partner from another firm rather than to a junior member of his or her own firm. However, the junior member might be the best solicitor if they are members of the same family, related by marriage, or have some other personal or social peer relationship.

Volunteers are obviously key to a personal solicitation campaign. It is imperative that they are comfortable in their role and feel that they can rely on you for support. If you can, recruit volunteers who have successfully made solicitation calls for you or for other organizations. Otherwise, you may need to provide training for new solicitors. (The January, 1987, issue of "Fund Raising Management" magazine has an article called "Teaching Volunteers the Art of Asking".)

Offer to send letters to each prospect, briefly outlining the campaign and introducing the solicitor. State that the volunteer will be calling within a few days to set up an appointment. These letters should be mailed so they arrive the day of your kick-off event. The letters must be personalized, mailed with first class stamps, and signed by the campaign chairperson.

MEDIA EVENTS

The personal solicitation component of your annual campaign is often the most visible part, except for your special events. You should use this opportunity to publicize your group and identify your chief volunteers with your cause. The kick-off event for your solicitors provides a good promotional vehicle.

Invite the media to this event. The business reporters are more likely to be interested when your chairperson is a high profile corporate leader. You can generate additional publicity by providing information on individual committee chairs to their community newspapers. They often print photographs and biographical information on community residents who are involved in fundraising campaigns.

Introduce your chairperson and key committee chairs, announce your campaign goal, tell how much has already been pledged in leadership gifts (from your Board, campaign chairperson, and committee chairs), and explain what programs the money will fund.

SOLICITORS' MATERIALS

A meeting with your volunteers can precede or follow the media portion of the kick-off event. It starts with a pep talk by the chairperson and Executive Director. At this time, you should hand out all the solicitation materials your volunteers need. A good solicitor's kit includes material for the volunteer to use and material for the volunteer to leave with the prospect. The volunteer needs:

1. information about the organization, its mission and programs

2. the prospect information cards you prepared

3. a budget by program for which you are raising money

4. pledge cards with the basic information filled in and

5. your name and phone number at the office.

The prospect should receive:

1. a copy of the latest annual report

2. a brochure about your group and

3. a gift club brochure or invitation.

If at all possible, the solicitor should fill in the amount pledged on the pledge card, sign it, have the prospect sign it, and then return it to you. The pledge card really should not be left with the prospect. If he or she feels "rushed" or "pressured" into a commitment, the prospect may ask for more time to think about it. In that case the solicitor will ask for another appointment and return then with the card.

Once the amount of the gift is settled, the volunteer can ask the prospective donor how he or she wishes to complete the gift. There are several possibilities that you should be prepared to handle.

1. Write out a check at once.

2. The organization should send an invoice.

3. The organization should send quarterly invoices until the pledge is paid off.

4. The solicitor should return in a stated time period to pick up the check.

SOLICITORS' CALLS

Right after the kick-off meeting, your solicitors should start calling prospects to make appointments. They should ask the prospect "when" not "if" they can meet to discuss the campaign. If your volunteer is uncertain about his or her job, offer to go along to provide support. Teaming up an experienced volunteer with a novice is often a good plan as well.

Your solicitors should rehearse their presentation before their first meeting. At the kick-off meeting, you may want to make a similar presentation to them. Be sure you have written text ready to hand out in case someone says that it is just what he or she needs. Make the "pitch" in a positive and reasonable way. Your group is offering an opportunity to invest in the solution to your community's problem. The solicitors should not demand support, but neither should they beg. Appeal to the prospect's pride and you will be successful.

Plan some introductory remarks to start the meeting with the prospect. If you are personally acquainted this is easier, but it is a good time to get to know each other if you are not. Then discuss your project and how it fits into the prospect's interests. For example: drug and alcohol abuse prevention efforts help employees be more productive and save money for the employer.

At the end of this discussion, suggest a specific amount or a giving range. Sometimes the prospect will ask, but often it is up to the solicitor. End the meeting when you said you would. Respect your prospect's time.

Follow up this meeting with a "thank you" note -- for the gift received or the consideration being given. If you have the donor's check, take it to the organization's office as soon as possible for receipt, acknowledgement, and deposit.

Your chairperson should contact the solicitors within a week of the kick-off event to get their first reports. You want to take advantage of the enthusiasm generated at that event.

The timetable for the campaign should be set in advance so the solicitors know when they are expected to have results. Make the meetings as often and as long as necessary to report what has been accomplished and what needs to be done next, and to reinvigorate the solicitors. Prepare and distribute an agenda and do not waste anyone's time.

Another possible use of these meetings is to consider reassigning prospects to solicitors if the original volunteer has not been effective. This can be a touchy situation and is best handled by your chairperson after consulting with you. Do not be too quick to make changes. Sometimes your volunteers just need the push of hearing about the successes of others to spur them into action.

Issue detailed reports to everyone involved in the campaign after each meeting. Be enthusiastic about progress to date and positive about the results to come. Keep your board members informed as well.

Keep to your original campaign timetable if at all possible. Hold your final report meeting as scheduled with the media again in attendance and announce the close of your formal campaign. It is likely that some of your volunteers will not have completed all their assignments or that all pledges will not be received. Keep track of those individuals and have your chairperson continue to encourage them. You and the chairperson must use your judgment to decide when the effort is to completely end.

Issue a final report to everyone involved -- including the major donors and your board of directors. A news release to the media is also appropriate.

INVITATION EVENTS

Another personal solicitation method is structured around an invitation-only event such as breakfast or lunch at a private club or someone's home. For example:

- Send written invitation from the campaign chair to a limited number of donors/prospects to breakfast at his or her club. The event is held to introduce the Executive Director of your group, or your board chairperson, and hear him or her speak about your programs. The RSVP instructions are to call you at your office. Make follow up phone calls on your chairperson's behalf to anyone who does not respond.

- Seat four to six people at round tables with a host/ committee volunteer at each. Use place cards and try to seat people together with a volunteer they know.

- After the meal, the chairperson should introduce your talk about the programs.

- The chairperson then talks about the importance of your group to the community and offers guests an opportunity to support your group's efforts.

- Each prospect should receive all the promotional materials mentioned earlier, including a pledge card and return envelope with a first class stamp.

- Each table's host should make contact with each prospect before they leave and say that he or she will be in touch in a few days to answer any questions, etc.

- o Depending upon their schedules, the volunteers should be debriefed before leaving the room. If that is not possible, contact them within 24 hours to get their feedback about each of their prospects.

STAFF ROLE

As staff members, you play an important supporting role in the personal solicitation campaign. Donor/prospect research, meeting planning, agendas, media contact, record keeping, letter production, receipting, and gift acknowledgement are key responsibilities. No less important is your role as enthusiastic -- yet realistic -- cheerleader. Your volunteers look to you for professional guidance and support.

DIRECT MAIL

Direct mail is a good way to raise money from people you would otherwise not come into contact with and to acquire donors who will continue to contribute to your cause. Although less personal than a face-to-face solicitation, the mail approach can be personalized to a great extent, especially if you have a good computer program and a letter quality printer.

Some people refer to direct mail solicitation pieces as "junk mail" and throw them out unopened. They are turning their backs on what can be an effective and efficient way of raising money for general operating expenses.

If you do not already have one, start a file of the third class mail you get at home. Depending on where you live, your "file" may have to be a large packing box! Review these pieces when you are getting ready to design your own mailing. Ideas for color, layout, art or copy can come from anywhere.

Be aware of the groups that are successful with direct mail solicitation and study what you receive from them. What do they do that makes people want to send them money by return mail? If you are not getting any mail solicitations, make a small contribution to one of the major health groups and you will receive all their requests in the future.

In general, a direct mail program has two requirements.

1. A list of names
2. A package to be mailed

THE LIST

The ideal list is made up of names of people who are personal friends of the person signing the letter and who are believers in your cause and who are financially able to make large gifts with no additional cultivation. If your list looks like this, you are very lucky.

The "ideal" direct mail package is very simple.

1. A hand written or typewritten letter, preferably on the signator's personal stationery, with a salutation of first names such as "Dear Dick and Jane". The letter has a specific date such as June 15, 1988.

2. A mailing envelope that matches the stationery with a first class commemorative stamp. It should be addressed by hand or machine, whichever matches the letter.

3. A return envelope pre-addressed back to your group and already bearing a first class stamp.

The text of such a letter is very direct and need not be long. For example:

June 15, 1988

Mr. and Mrs. Richard Smith
123 Market Street
Anywhere, USA 00000

Dear Dick and Jane,

As you know, I have been involved with EDUCATE ever since we started it in 1980. Together we have helped it grow from 10 parents to hundreds today.

We are facing a unique opportunity over the next five years -- a drug free high school system. However, we need money to make it happen.

Specifically, we need $1,000 right now to launch the next phase.

I volunteered to recruit some of EDUCATE's supporters to join me in raising that money within one month and I knew you would want to help.

I already sent my check and I hope I can count on you for $100 toward the goal. A month is not much time, so we need your prompt reply.

Let me know if there is anything I can tell you about the campaign. I know you already believe in the cause so I hope we can count on your support.

Sincerely,

John Grant
EDUCATE Board Member

Assuming that "John Grant" asks for $100 in every letter, he needs to send at least 15 letters to get his $1,000. There are always some who cannot contribute at the time, so more prospects must be approached. You should plan for that in the beginning rather than scramble at the end of the campaign for additional names to help reach the goal. Also, John's check must be for at least $100 or he is the wrong person to be sending these letters. Someone is certain to ask him what his contribution was.

There are some things to note about the letter.

1. It is conversational. There are contractions.

2. The paragraphs are short.

3. It is written very much from one friend to another, from "I" to "you".

4. It reinforces the theme that "we are in this together".

5. It asks for a specific amount and states the overall goal.

These are all points that are common to effective letters.

Few groups are lucky enough to have such an ideal list of prospects. Most groups have an assortment of names gathered from a variety of sources. There are volunteers, board and staff suggested names who have expressed no interest, people who called once to ask for a brochure, some foundations, the CEO's of the biggest companies in town, all the school administrators, many ministers, the major public officials, and everyone who has donated anything in the past.

A mail appeal to this list differs from an appeal to the ideal list of names.

You first need to decide which prospects will receive your mailing and which will not. (A computer with a data base management program is a tremendous help in direct mail fundraising. It does all the tedious work and frees you to make decisions.) The prospects you should put on your "do not solicit" list include:

- those approached by volunteers during the personal solicitation phase of your campaign
- foundations and corporations who only respond to project proposals
- governmental funders and
- those who have already donated to this year's campaign.

Next segment the people who are known personally by the letter's signator. This is the "ideal" portion of your list and can be handled as we have already discussed.

If there are friends of board members on the list, encourage your trustees to write personal letters to them. You should provide them with suggested letters and offer to actually print the letters for them if you have adequate secretarial support (or volunteers). Once you convince one of your trustees to do this, he or she will usually get some of the others to write letters -- or make phone calls -- too.

The remainder of the names on your list are unknown to anyone connected to your group. That does not mean that they will not contribute -- some already have done so -- but their motivation to give is belief in the cause because there is no personal relationship to strengthen the appeal.

You should be building your mailing list all the time. There are a lot of opportunities.

1. When you are speaking at a club, church, or civic group, ask for a membership list. Some will refuse, but it does not hurt to ask.

2. All of your volunteers should be asked to contribute money, in addition to their time. A membership campaign is a good time to solicit staff and volunteers.

3. Whenever you talk with someone who is interested in your cause, get the name and address.

4. Ask your trustees and other volunteers for names and addresses.

5. Capture names and addresses of people who attend your events. If the event is not one where people sign in, have them fill in tickets with names and addresses and raffle off a door prize.

6. Trade your lists with another nonprofit group. Some names will be duplicates, but many will be new ones for you.

7. Many organizations publish their members' names in playbills, advertising books, or annual reports. Although you will have to spend some time looking up the addresses, these lists are genuine donors to other causes and should not be overlooked.

Another option is to purchase a mailing list. Some other non-profits in your area may sell their lists to you. Certainly there are commercial firms who would work with you. Ask other people what list brokers they recommend but do not restrict yourself to other nonprofits. If you know someone who is starting a new business and bought a list of prospective clients or buyers, ask him/her if the list worked. That is what you are doing. You are selling a cause to people who know little or nothing about it. You want a broker who can help you identify the people who are most likely to make a financial investment in your cause.

If no one is satisfied with the brokers they used, be sure to get the firms' names and find out why they were unsatisfactory. It may help you formulate the questions you should ask when interviewing brokers.

Look under "Mailing Lists" in the yellow pages of your telephone book for names of list brokers. Call several and ask the same questions of each one. If someone is too busy to talk with you or is uninterested in answering your questions, cross them off your list and go on to the next one. The following are some of the questions you need to discuss.

1. What is the guaranteed deliverable rate? Is there a refund if undeliverables exceed the promised rate?

2. How long will it take to ship the labels to you after the broker receives the order?

3. Is complete prepayment required?

4. Are the shipping charges included? If not, what are they?

5. What is the cost per thousand names?

6. What is the minimum number of names you can order or the minimum dollar value of the order?

7. In what formats can the labels be printed? How many across a sheet of Cheshire paper? Are pressure sensitive labels available?

8. Is there a lower nonprofit rate?

9. Is there a basic flat fee in addition to the cost per thousand labels?

10. If the list rental is for one use only, what would the charge be for a second use? (You may want to mail a newsletter 10 days in advance of the solicitation.)

11. Can you get a computerized list or index cards of all the names as well? At what cost?

12. How often do they update their list?

13. Can they deliver the labels pre-sorted by zip code so you can take advantage of lower postal rates?

14. Do they need a sample of the package before they will ship the labels?

There are lists available of people segmented in every way you can imagine. Before you call the brokers, you should have a good idea of the characteristics of the names you want to buy. Possible criteria could be:

- two-parent or single-parent households
- children of a certain age range
- number of children
- annual income
- level of education of parents
- home ownership
- make of car
- magazines subscribed to
- profession
- one or two income
- religious affiliation

How can you decide what criteria to use? One way is to look at the people who already donate to the cause and define the commonalities between them. If they generally tend to be from two-income homes, have an annual income of $100,000 and have teenage children, then you should purchase names of people who fit a similar profile.

Remember, though, the more discriminating you are in selecting the names, the more expensive the list will be to purchase. However, if your criteria are the right ones for you, you will bring in more money from a well-selected list than from a cheaper, less accurate one. If you are uncertain about how to select a broker or a specific list of names, find a volunteer who has the time and expertise to help you.

You are probably buying only a portion of the names that fit the criteria you set. If your mailing is successful, you may want to mail the same appeal to another set of names from the same group. If you think this is a possibility, ask your broker if they can do something so that there will be no duplications in the second set of names with the first. Or you could ask if they can delete the names of the people who responded already before they extract the second set of names. Discuss all this before they extract your first labels or it will probably be too late.

What you really want to buy is a list of people who will give to your group after receiving only one request in the mail. No such "cold list" will ever give you a 100% return rate. You should consider such a mailing a success if the contributions cover all the expenses of the mailing.

You see the results of buying a cold list in the renewal contributions that you get from your new donors over time. Develop a plan to upgrade the level of their gifts. Start by saying "thank you" for this first gift and immediately add them to your mailing list. If you have a recent newsletter or a brochure that was not enclosed in the mailing, send it along with the thank you letter. This reinforces the positive relationship developing between you. One or two of your donors may request that you not "waste his or her money" on thank you letters or receipts and that his or her check is enough for the IRS. You should comply with this request but continue to send the newsletter.

This is a good time to remember that every donor is one person, an individual. Even if you mailed out 10,000 letters to strangers, each person got only one letter and each donor responded to your appeal as an individual. Your reply to him or her should be as personal and as one-on-one as their gift was to you.

THE PACKAGE

Now you have your list. Whether it is the in-house list that you maintain on your computer or a cold list from a broker, you have the names you will be soliciting by mail. Next you have to decide what to send to them.

The solicitation package has several components. We will discuss five specific items.

1. the letter
2. the mailing envelope
3. the reply envelope
4. the reply device
5. other inserts

THE LETTER

If you have letterhead for your group, use it for all your direct mail appeals. It should have the group's name, address and phone number printed on it as well as your logo, if you have one. The board of directors can be printed down the left side of the page. List the chairperson at the top, followed by the officers, and then the other members. The Executive Director's name should follow the listing of the trustees.

A letter has several distinct parts.

Date

Inside Address

Salutation

Body of Letter

Closing

Signature

Typed Name
Title

Initials

Enclosures

P.S.

The date should be as precise as possible. If you are sure of your mail date, use that specific date on the letter. If not, use at least the month and year. That is much better than "Spring" or no date, which is unacceptable. Your appeal must have some sense of urgency, of a problem to be solved now. Using a specific date helps reinforce the time-sensitive quality of your appeal.

Since these letters are going to people who are not friends of the signator, you will not use a familiar salutation. But you still have a choice to make about the inside address and salutation parts of this letter. You can personalize every letter with titles and last names (i.e., Dear Mr. and Mrs. Smith) or you can delete the inside address and send the letters to "Dear Friend". As a general rule, you should personalize to the greatest level possible.

If you have a short list and sufficient clerical help, this is not a problem. With today's data processing and printing capabilities, there actually is a simple way to print even thousands of personalized letters. When you buy the names, ask for them on electronic media that can be read by your computer or by the computer of a mailing service you are using. The cartridge or tape contains all the names and addresses that you could have printed as labels. The computer software can then merge that data with the letter and envelope and print them. Generally a high speed ink jet or laser printer is used. Whether or not you choose this method depends on the kind of hardware and software you have in-house or what is available in your community and on what you are able to spend.

You may even be able to find a business with the kind of computer capability you need who will donate time and personnel to your project. Otherwise, customization becomes a matter of cost. Personalizing adds to the cost of printing, to the length of time it takes to do the job, and to the postage on each piece mailed. If you have purchased thousands of names, it may be more cost effective to simply print the less personal "Dear Friend" letters but try to be more creative than just "Dear Friend" in your salutation. "Dear Parent" or "Dear Drug Free America Advocate" are more personal and cause-specific than "Dear Friend".

If you decide to personalize your letters, you can increase the number of times you use the prospect's name or address in the body of the letter. For instance, you can say "...All your neighbors on Market Street are interested in our cause..." or "...You know, Mr. and Mrs. John Smith...". When this first became possible, several years ago, because of expanded technology, it was impressive and effective. Today's readers are more sophisticated, however, and recognize this technique and tend not to respond positively.

A commonly asked question about a fundraising letter is, "how long should it be?". The answer is simple, although not very helpful: It should be long enough to elicits the response you requested. There has been some research into the effectiveness of multi-page appeals that says that two page letters produce better results than do one page, three page do better than two, and four page do better than three. This is only true, however, if your longer appeal is so well written and engrossing that the reader reads the whole thing. If the cause, the problem, your solution, and your request can be persuasively stated in a short letter -- write a short letter.

Your letter should have a single focus such as a specific project you want to do or support for general operating expenses. Do not leave your reader confused about the use of his or her money. You can use the following formula to organize your letter.

1. State the specific problem in terms of the people affected. Use a personal example -- how the problem affects one person and those around him or her. Show the reader how your group is solving that person's problem. Don't talk in generalities or about "people" in a mass. Touch the reader with a story of one person.

2. State how you are solving the problem.

3. Tell the prospect what his or her gift will do to help solve it.

4. Ask for a specific amount.

Although the format of a fundraising letter resembles that of a business letter, the best appeal letters reach for an emotional response. They appeal to the heart with pictures drawn by words. A good letter makes a reader respond because it makes him/her feel good about writing the check. It is not an intellectual response, but clearly an emotional one.

Some people advocate "crisis" letters in which you tell the reader that unless contributors respond quickly, the group will go out of existence. If you are having a genuine crisis, you can do this. Be aware, however, of the risks you face. Individual donations to crisis appeals tend to be low and hard to renew or upgrade in future appeals. For instance, if my $5 gift saved you from ruin last year, why do you need more this year when you are not in a crisis situation? Also, you cannot cry "crisis" too often because no one wants to contribute to a group that is always on the verge of dissolution. People like to be part of a success. They like to feel pride in the groups they support. Appeal to their pride, and you are more likely to encourage real commitment among your donors and to be successful in the long term.

A business-like closing is appropriate for a fundraising letter. A religious closing like, "Shalom" or "God Bless You" is best from a minister, rabbi, or priest. A simple "Sincerely" will suffice in most cases.

Who is to sign your letter? Your overall annual campaign chairperson is an excellent choice especially if he or she has been featured in your media publicity. Your board chairperson is also a good choice, especially if he or she has high name recognition across the community. Other possibilities are local celebrities, politicians, or sports figures. Be sure to choose someone who is well liked in your area or the signature is likely to do you more harm than good.

It is a good idea to type the signator's name and title in your organization's name below the signature. Some people's handwriting is illegible and the typed version is a necessity.

Placing the writer's and secretary's initials and the word "Enclosures" below the closing adds another business-like touch to your letter. If you need to shorten your letter to fit it on one page, you can delete these two lines. If they fit, use them.

The P.S. is considered by some direct mail experts to be the second most important part of a letter. That is because tests have shown that the reader's eyes move from the first paragraph directly to the P.S. If you have not captured the reader's attention by then, he or she probably will not read any more. The P.S. is a good place to reiterate your request for a specific amount of money and to tie it to exactly what it will provide. For example: "Your $50 donation will keep our 24-hour hot line open for two days."

One final word of advice: Do not write your letter by committee. A well-written letter is the result of art and craft and science. If you do not feel qualified to write the appeal, find a volunteer who knows what to do. Do not assume that your trustees or even your campaign chairperson is well-versed in how to write such a letter. The letter's signator must be comfortable with the content of the letter, but it should come from you, in draft, for approval. Besides, most campaign chairs are busy people who are accustomed to someone else handling the details and they are used to seeing just the final product. No letter will satisfy everyone unless it is so bland that it will also not elicit any response. Be firm in your convictions of what is required. (Read any of Jerry Huntsinger's books for an excellent lesson in raising money through the mail. See this manual's Resource List for one of his books. He is also a contributor to "Fund Raising Management" magazine.)

THE MAILING ENVELOPE

The mailing envelope should match your stationery in color, paper quality, and type style used. Your group's name and return address should be obvious on it. Most mail appeals are sent in #10 envelopes because most business stationery is 8-1/2" x 11" which folds in thirds to fit a #10. A smaller package, such as a #6-3/4 envelope, is often used by business people to solicit friends because it has a more personal look than the larger envelope.

Much research has been done to measure the effectiveness of various ways to address the envelopes including writting by hand, typing labels on a closed envelope, or labels in a window envelope. The real purpose behind such research is to find out which method results in the envelope being opened most often. The answer is that the more personal in appearance it is, the more likely it is to be opened. Labels may be necessary for larger mailings, but should not be the first choice in other situations.

You should have a message slug for your postage meter as well as a rubber stamp so that every envelope you mail carries a cause related message. The message links the name of your organization very clearly to the overall cause for which you exist.

THE REPLY ENVELOPE

You should make it easy for someone to send a gift by enclosing a reply envelope in your letter. The reply envelope must be smaller than the mailing envelope so it fits inside without folding. A #9 fits into a #10, for example. The reply envelope should be pre-addressed back to your office. Whether or not postage should be prepaid is a question you need to answer for yourself. There are a couple of good reasons not to do so.

1. It costs you money.

2. Everyone has stamps at home to pay their bills. When the utilities and department stores prepaid their bill payment envelopes, it made sense for charities to do likewise. Today, however, everyone needs stamps at home.

The color of a reply envelope is another decision you need to make. Some research shows that a strongly colored envelope, such as hot pink, gets a higher rate of return. The theory is that people want to get it out of their homes quickly because it is not a very comfortable color! If you are doing a fairly large mailing, you could test whether or not the color of the reply envelope increases the rate of return by randomly selecting half the list to get white envelopes and the other half a colored one. You can also measure whether the color can be tied to the size of the gifts you receive.

THE REPLY DEVICE

You should consider enclosing a reply device in your mailings. A simple piece that reinforces the message of your letter and also asks the donor for some information is best. Often, a person will throw out your letter and mailing envelope but keep the reply envelope and fully intend to send a check later. By the time "later" comes, he or she may have forgotten what your letter said. The prospective donor is likely to have kept the reply device because it has to be filled in and returned with a check. Your message is there as well and the donor remembers why he or she should give. A simple piece could look like this.

EDUCATE

1512 Main Street, Anywhere, USA 00001 (301) 555-5555

Join our fight to free our children from drugs.

______________ Name	____ $ 10 Member
	____ $ 25 Sponsor
______________ Address	____ $ 50 Advocate
	____ $100 Century Club
______________ City, State, Zip Code	____ $250 Trustee Club
	____ Other
______________ Home Phone	

____ My company has a matching gifts program.

____
Company Name

NOTE: EDUCATE is a 501(c)(3) organization and all donations are eligible as deductions under IRS rules.

You can use the reply device to elicit other information from your donor as well. In the above example, EDUCATE asked for names of companies with matching gifts programs.

Another possibility is to use the reply device to recruit volunteers. You can add a line that reads "I would like to be an EDUCATE volunteer. My phone number is ___________." Be careful about doing this -- you may dilute the message that you need money by asking for volunteers. You generally do not want to offer people a choice between making a donation or doing something else. However, if you really do need volunteers as well as money, this is one channel of communication that you can use.

OTHER INSERTS

Any other inserts you put in your package should be there for only one reason: they strengthen your appeal. Pieces that detract from your message or cause the reader's focus to shift should be avoided. A well-done brochure is often an asset. A flyer about an upcoming fundraising special event should not be enclosed in an appeal for membership dues. The recipient then has a choice between writing a check or going to a future event and is likely to do neither. You can always send the flyer with the thank you letter to those who donate.

WHEN TO MAIL

Some months are better than others for responses to direct mail appeals. Summer months are generally the worst ones because so many people take vacations. Their mail piles up and they may not have the time needed to devote to your piece when they finally get it. The Thanksgiving and Christmas seasons are good for direct mail. A year end tax-related appeal often works well for donors in higher income brackets. A membership appeal in the first quarter of the year is good. If your program operates on the school calendar schedule, mail your membership appeal about two weeks after classes begin.

You can ignore all the conventional wisdom if you already have an appeal pattern established and it works. There are successful July appeals by some groups.

If you are doing a special event or something else that is getting a lot of publicity, take advantage of that and do a mailing. The mail works best for groups that are well-known and respected. Take advantage of the opportunities created by good publicity to get financial support for your cause.

You can also do a successful mailing when your cause is a "hot topic" in the media. If you provide drug and alcohol-free post-prom parties and a local TV station is running a series on teen drinking, do a mailing to get support for this year's parties. If there is an alcohol related teen tragedy, you can show how your group is working to prevent this from happening to some other family.

BULK MAIL

If you are unfamiliar with postal regulations regarding third class nonprofit bulk mail, contact the Post Office Bulk Mail Office. There are annual fees that must be paid in advance to allow you to mail at the third class nonprofit pre-sort rate or the first class pre-sort rate. There are additional fees for the use of Business Reply Envelopes (BRE).

If you are going to assemble your bulk mailings yourself, be sure to follow the postal regulations precisely. They check these mailings carefully and you will have to visit the postal center to correct your mistakes. It is costly in time and money.

There are mailing service bureaus that will do all or some of the work of bulk mailing for you once the printing is done. Ask for references among other fundraisers and business people just like you did when looking for a list broker. (Some mailing services will also act as your list broker.) Develop a list of questions to ask your prospective services.

1. Can you handle Cheshire and pressure sensitive labels? How many across?

2. Can you meter envelopes or must they have printed indicia on them?

3. Do you have a nonprofit discount?

4. Is there a minimum charge regardless of the size of the order?

5. What is the cost per thousand of
   ...affixing labels?
   ...inserting 3, 4, 5 pieces?
   ...metering and sealing envelopes?
   ...bundling according to postal regulations?
   ...taking to post office?

6. Do they require a check for the postage when they receive the order?

7. Is prepayment required or will they bill you?

8. Can they give you names and phone numbers of references who do mailings similar to yours?

9. How long will it take to complete a mailing once they receive all the printed materials?

Direct mail requires attention to detail and is relatively expensive in staff time and money when you start a mail program. It can, however, be a source of steady and growing income. If you are thinking about using mail to reach people beyond those who already support you, ask yourself if your group is well known enough to prompt people to respond. If you think you are, make a financial commitment to a series of mailings so that you can really test what appeal works for you with what segments of the population. An aggressive, consistent program will keep money coming in to support your program.

TESTING

Once you decide to mail to people not on your "ideal list" you have to be very careful. You have to plan and be willing to start small. If your list broker has 20,000 names that fit your criteria, mail to 2,000 to 5,000 of them and test the results. What percent came back with gifts? How much did you raise? What was the average gift? Did you cover your costs?

It is best to divide any purchased list in half and test one aspect of the mailing. You could send a one-page letter to half the names and a two page letter to the other. Half could get a brochure and the other half not. Test a bright pink reply envelope versus a white one. Send the same letter but signed by two different people. Remember, test only <u>one</u> difference in each mailing. That is the only way you can measure the difference in results.

You can also test the selection criteria for the list itself. If you are buying from a broker who sells magazine subscribers' lists, you could buy 2,500 names from "Redbook" and 2,500 names from "Good Housekeeping" and mail the same package to each.

No matter what you test, the results will help you make your decisions about your next mailing. If you mail often enough and test all the possible combinations of letter, signator, color, etc., you will finally find the package with the best results for you. This is what you should use repeatedly to raise money from "cold" lists. TEST! TEST! TEST! That is the word to remember when doing direct mail.

SPECIAL EVENTS

Every organization can benefit from special events. They offer a unique opportunity for favorable publicity for your group and your cause. They can pay off financially as well -- both in immediate profit and in new donors attracted by the accompanying publicity.

Be sure to capture the names and addresses of all the volunteers, donors, and attendees. You will use this list to thank everyone involved and it will also be the basis for recruiting next year's volunteers and donors. Also, you should ask these people for a financial contribution at some point during the year.

While special events are fun and often financially rewarding, they are always hard work. Whether the event turns out to be a success or a total failure, the work has to be done beforehand.

In small communities particularly, it is easy for one printer or one grocer or one hardware store to be asked for donations by every group in town. Figure out a way you can raise your money directly from the people in the general public. A series of imaginative, small special events with high levels of volunteer involvement can be very profitable. Offer unique and creative ways to support your cause and the income from these events can add up to what you need for your programs. Be sure you have enough volunteers so that a few "dedicated" ones do not get burned out.

Never fool yourself or others into thinking that just because your cause is a good one, people will come out and support it. You have to look at an event from the donors' and participants' viewpoints: What is in it for them? Do not just hope that you will raise money. Be realistic in planning and execution to maximize your returns.

The kind of event you produce is limited only by your imagination and your community's resources.

Special Events:

- amateur entertainment
- anniversary celebrations
- antique show
- art exhibit
- auction of services or products
- bake sale
- benefit evening
- benefit performance
- bingo
- book sale
- canvass neighborhoods and ask for donations - be sure to hand out brochures to donors
- card parties
- casino night
- celebrity sports event -- local newscasters or pro team members or a college team against each other or a championship high school team
- concert -- sell a block of tickets and keep a percentage of the sales
- craft show and sale
- dances -- with a fun theme or a gala black tie event
- decorator showhouse -- work with the professional decorators' guild or association

- designated charity -- ask to be the beneficiary of an opening or closing of an art gallery, movie, play, or exhibit
- dinners, suppers, lunches, breakfasts -- progressive, formal, picnic, etc.
- fairs and festivals
- fashion show
- flea market
- footrace -- anything from 3K to a marathon
- garden walks
- haunted house at Halloween
- holiday event
- house tours
- movie premiere
- open house
- parties in unusual places or with unusual themes
- plant sale
- private parties in homes are inexpensive and can be very profitable
- produce sale
- raffle
- road rally
- rummage or white elephant sales
- scavenger hunt
- skill contest -- fishing, bowling, archery, etc.
- sponsor a debate or a speech - the admission is a donation; for a larger gift, you can meet the debaters or the speaker at the evening's end
- sports event -- sell a block of tickets to a

pro event and keep part of the proceeds

- tea party -- sell tickets and get tea and food donated; the location is critical
- theatre party -- sell out the house; sell a block of seats; offer a post-show party with cast members for a larger donation
- bike-a-thon (pledge by the mile)
- bowl-a-thon (pledge by the number of pins knocked down)
- dance-a-thon (pledge by the hours danced)
- jog-a-thon (pledge by the mile)
- radio-a-thon (like a telethon, only on radio)
- read-a-thon (pledge by the book)
- rock-a-thon (rocking chairs - pledge by the hour)
- skate-a-thon (ice or roller - pledge by the hour)
- swim-a-thon (pledge by the lap)
- telethon
- walk-a-thon (pledge by the mile)
- tour -- contact a travel agency and work with them
- tournament -- backgammon, chess, bridge or other card game, checkers, Trivial Pursuit, Pente, etc.
- tribute event -- local leader to international star

This book details itemized plans for two events to give you an idea of the kind of planning that needs to be done. The Resource Section also includes books that give general directions for specific events. Use your own best judgement and creativity to decide which event is right for you, then contact someone who has already done it and ask for their help.

There are some common elements present in all successful special events:

1. planning and goal setting
2. motivated volunteers
3. appropriate choice of event and date
4. creative use of community resources
5. effective publicity
6. adequate budget setting and record keeping
7. prompt and appropriate appreciation
8. clear eyed evaluation of results

PLANNING AND GOAL SETTING

Plan every detail before you get started. The fewer things you leave to luck, the better are your chances for success. Here is a list of some of things you will not want to forget.

- sales people
- cashiers
- waiters
- security personnel -- for the event and to escort you to the bank with the proceeds
- ticket takers
- maintenance people
- score keepers
- lighting and sound equipment
- ramps
- tables and chairs
- dishes, silverware, glassware
- table linens

- cash boxes
- receipt books
- cash for making change
- trophies and prizes
- first aid kit
- pens, pencils, markers
- tape
- poster board
- watch
- aspirin
- decorations
- costumes
- stages
- key phone numbers
- emergency phone numbers
- insurance
- tickets
- posters
- brochures and flyers
- entry forms

Put numbers on paper and figure out what the actual costs will be and how much you can expect to raise. The difference between the two is what you will really derive from your project. Does it seem like a lot of work for a small return? Now is the time to be realistic -- not optimistic -- about what you can do. For instance:

- You are doing a 10K run and the runners are not collecting pledges -- just paying an entry fee of $10.

- You are selling t-shirts at $5 each (you paid $2 each).

- You are selling soft drinks and fruit juices at $.50 (all donated).

- You think that 200 joggers will show up and half will buy t-shirts.

200 x $10.00 = $2,000	entrance fee
100 x $ 5.00 = $ 500	t-shirts
300 x $ .50 = $ 150	1-1/2 drinks per entrant
$2,650 gross income	

100 x $ 2.00 = $ 200	t-shirts
1 x $ 25.00 = $ 25	municipal fee for permits
1 x $100.00 = $ 325	printing costs for brochures, entry forms, posters, winners certificates
$ 325 costs	

$2,650 - $325 = $2,325 net income

Unless you can reduce costs or raise income, the most you will make is $2,325. If your goal is $5,000, for instance, you have to make some plans to increase the number of entrants and the shirt sales and reduce costs.

Set goals for your event and make plans so that you will reach them. Goals must include:

1. volunteer involvement.

2. income from donations.

3. income from other sources such as admission or merchandise sold or space in an ad book.

4. number of people attending the event.

5. net income after all expenses are deducted.

6. amount of publicity generated in the community.

Be sure you allow enough time to plan and execute a special event -- especially the first time you do it. Starting a year in advance can be necessary for complicated events to turn out well.

Consider the weather when making your plans. A "rain or snow date" is mandatory for events in some areas of the country.

VOLUNTEERS

Motivated and enthusiastic volunteers are the key to a successful event and involving them in the planning process gives them a sense of ownership. You must provide upbeat leadership so that they enjoy coming to work and will recruit their friends to get involved as well. While most people join a group for the cause it represents, they are more likely to participate if they are having fun.

Begin to recruit your chairperson as soon as possible. Be sure he/she understands what is required and has the time and interest to devote to the project. It is a good idea to have a written job description so your candidate will know what is expected before making the decision to take the job. Some responsibilities would include:

- Recruit vice-chairpersons.
- Contribute to plans, budgets, etc.
- Attend meetings with staff (estimate number and frequency over a period of time).
- Chair meetings with volunteers (estimate number and frequency over a period of time).
- Personally solicit donations from individuals, corporations or foundations.
- Sign solicitation letters.
- Make a contribution of money if there is a personal contribution campaign associated with the event.
- Provide enthusiastic leadership to volunteers.
- Serve as spokesperson for your cause to the media during the event's publicity campaign.

If your first choice for chairperson turns you down, ask him/her to suggest another candidate. You do not have to choose this candidate, but you must give him/her serious consideration or risk insulting your original choice.

Once your chairperson is selected, you can complete your organization chart and make other plans. Staff members should suggest people who are interested in the cause and can chair the committees. However, the chairperson should recruit people he/she can work with to make a successful event.

Organize your committees around obvious tasks. A 10K run could include these committees.

- publicity: entry forms, TV, radio, print media, cable, banners, posters
- location/course
- concessions for sale and refreshments for volunteers
- liaison with the authorities for permits and road closing
- trophies
- Red Cross aid stations
- check in table
- volunteer recognition

Committees will vary in size depending on the complexity of the jobs to be done and some jobs can be handled by staff members as well as volunteers. Committees should be large enough so everyone has enough to do to feel a sense of ownership but not so much that they feel overwhelmed by the work to be done.

If you cannot recruit enough good volunteers to do the event, do not do it! Pick an event that you can do well so everyone participates in a success.

CHOOSE YOUR EVENT

Use your imagination when choosing your event. Read the newspaper, church bulletins, school newspapers, etc., and talk to friends about what they like to do. Put on an event that has a built-in audience. Or, be original and attract your volunteers and attendees by the uniqueness of your event. When people are having a good time, they will spend money. It is your job to ensure that they have a good time.

Realistically assess how successful this event can be for you. Has anyone else done a similar event in your area? Was it successful? Are they doing it again? Will they talk with you about it? Can your community support more than one event like that each year? Now is the time to ask the tough questions.

Choose a location that is the right size for your event. If you are doing a craft sale, be sure there is enough parking space outside and enough "elbow room" inside. Make it convenient and comfortable for your shoppers so they will stay and spend money.

RESOURCES

Tap all of your community's resources when planning your event. Involve students, business people, community groups such as the Elks or Boy Scouts, as well as family and friends. They can donate time, materials or money and then participate!

Encourage companies to sponsor the event or a portion of it. For example, a radio station that sponsors a 10K run provides lots of free on-air publicity and t-shirts for all the volunteers as well as a "personality" at the event. In return, the station is seen as a good citizen for supporting the cause and receives publicity from printing its name on the t-shirts that they provide.

Be creative when you approach companies. There are many acceptable ways to publicly recognize their sponsorship. Companies do make contributions out of a sense of community responsibility, but they are always interested in a partnership in which they receive something more in return for their financial contribution.

PUBLICITY

Plan your publicity campaign so you reach the people who you want to attend. For some events, the potential audience is everyone in your community. For other events, you want to target a group with specific interests. For instance, your primary audience for a 10K run will be found in running clubs and school track teams. You can reach them most efficiently through the clubs' meeting places and newsletters, posters and flyers in stores selling running apparel, the schools' newspapers and public address system announcements, and flyers at marathons and track meets prior to your event. You should also promote the event via radio, TV, or newspaper community calendars to reach a more general audience of "Sunday joggers". Review this manual's section on Public Relations for information about using specific channels of communication.

Check with your Chamber of Commerce to see if they maintain a community calendar of events. This can be helpful in two ways. First, it can help you decide on a date for your event when the competition is low, and second, the Chamber can list your event as soon as you decide on a date.

Special interest groups such as joggers often maintain their own calendar of events. Check with one of the jogging clubs to choose a good date and to get on the calendar.

BUDGETS

Establish an expense budget and stick to it. Decide what you can afford to spend on the event, including publicity and still reach your financial goal. An event that costs more to put on than it produces in income may still be a good investment if it generates a substantial amount of favorable publicity and volunteer involvement. (However, consider this a public relations event and not a fundraising event. Otherwise, your volunteers and donors will be disappointed with the results.)

Also, an event that has high costs in its first year, compared to income, could be good for you if it has growth potential in future years. For instance, a conference that draws only 20 people this year could grow to 100 next year and even more in the next.

Keep accurate and complete records of donations, other income and expenses. Without them, you cannot really evaluate the success of your event.

APPRECIATION

Say "thank you" to everyone! Donors of time, of money and of products should be thanked at the time of the donation and, if feasible, again after the event. The first "thank you" should come from the staff member or volunteer involved in soliciting the donation. The second should be from the chairperson of the whole event. This should include a report on the success of the event and the importance of the donor's gift to that success. You cannot say "thank you" too often.

You should be creative in choosing the form your appreciation will take. Volunteers might get t-shirts or caps printed with the event's name on them. Companies like to display certificates, plaques, paper weights or other office decorations to show that they support community efforts.

If children and teens are incolved in your programs, have them send the thank you's to the CEO's of your corporate donors. It will make a very positive impression for your cause.

If you have a celebrity involved in your event, ask him or her to sign the certificates for your very top volunteers and donors. You can be sure your organization will get plenty of publicity as the certificate is shown to everyone who enters the office.

EVALUATION

Evaluate your event using the goals you set during the planning process. Learn from your successes as well as from your mistakes. Reevaluate the event each time you do it and discontinue events that lose money or require too much effort for what they produce.

Remember that you and your volunteers could be doing something with more potential impact if you were not working on an unprofitable event.

It is over! You produced a successful special event, raised lots of money, involved new volunteers and made all the donors feel good about your cause. Now what do you do for an encore? You make it bigger and better next year!

- Add more hours or another day.
- Place more publicity to increase attendance.
- Solicit more -- or more valuable -- items for the auction.
- Invite people to a pre or post-party for the event -- for bigger donations.
- Build other fundraising projects around this event. It can be the kick-off or wrap-up of your annual campaign!
- Adjust the ticket cost to a popular event, without pricing it out of the means of your audience.

- Add a coffee and cake sale to your car washes. You have a captive audience.
- Bake more cakes and cookies to sell.
- Make it an annual event with a core of dedicated volunteers who want to come back because it is fun.

SPONSORED EVENTS

There is another way to profit from special events without doing all the work yourself. Other groups in your community can sponsor events and donate the proceeds to you.

Generally, your main contribution is to help publicize the event or sell tickets. However, you must stay in close touch with them from planning through execution. You want to be sure that the event is appropriate to your cause. (For instance, an anti-drug use group would not want to be associated with a rock concert featuring a band who sings favorably about drugs.) The Children's Hospitals in Pittsburgh and Cincinnati have extensive relationships like these with individuals, businesses and community groups who raise money on their behalf. These programs took years to develop and require continuous contact by hospital personnel.

Auxiliary groups devoted to raising money for you work in a similar way. Again, you must maintain a close relationship with the auxiliary so that they are fully aware of all your programs and so that you are aware of their projects on your behalf. They are, of course, subject to oversight by your Board of Directors. Some organizations will include the auxiliary's president as an ex-officio member of the Board or as a full Board member.

GRANTSMANSHIP

The following material is excerpted from Discover Total Resources: A Guide for Nonprofits, written and published by the Mellon Bank of Pittsburgh, PA.

> GRANT: THE MUNIFICENT OBSESSION
> Somewhere in America, some time ago, someone must have started the rumor that grants are the solution to every nonprofit money problem...because many nonprofits allocate a

disproportionate amount of time and money chasing grants, when they should be pursuing renewable resources.

True, a few grants are renewable, and grants play a vital role in the funding of America's nonprofits. But they can't possibly live up to everyone's expectations. And they **aren't easy money**. The competition is getting tougher, the criteria more explicit, and grantors more discerning.

Still, there is a time and place for grant solicitation. To discover what that is, it's essential to understand grants and their purposes. A grant is money given in return for action promised. A grantor agrees to give a specified amount only on the condition that the nonprofit use it for a designated purpose. Though names and descriptions vary, a brief summary of the most commonly known grant types follows:

Capital: Usually made to established organizations to meet future service demands. Includes funding for land acquisition, building construction, and equipment purchase.

Challenge/Matching: The pledge of a specified sum, to be paid only if the nonprofit raises an equal or otherwise designated amount.

Conditional: Similar to a challenge grant, but the grantee must satisfy some condition other than matching funds.

Earmarked: Grant made to a third party for use by a nonprofit just getting organized and that has applied for 501(c)(3) tax-exempt status. Allows the grantor to meet contributions requirements, and still help an organization it believes in.

Endowment: Funds donated for investment to provide a nonprofit with regular income.

Funding Crisis: A number of grants to assist nonprofits experiencing unexpected or temporary financial problems, including: cash reserve, debt reduction, and emergency grants.

General Support/Unrestricted: The most liberal of grants, funds may be used for a broad range of organization needs, including general operating -- usually at the recipient's discretion.

Research: Grants for medical, educational, and other types of research and associated research activities. Range from special projects to the construction of a research facility.

Seed: Start-up funding for a new program or organization. Sometimes renewable.

Technical Assistance: Grant awarded to a nonprofit or to a third party to provide needed services.

After deciding what kind of grant you need, discover where to get it. There are a number of possibilities. Though the best known grantmaker is the foundation, grants also are made by corporations, government and civic, service, and religious organizations. A brief outline of their basic characteristics follows.

FOUNDATION

A foundation is a nonprofit organization created for the purpose of establishing or maintaining charitable, educational, religious, social, and other activities for the common good. Because foundations enjoy special tax privileges, they are required to donate at least five percent of the market value of their assets to charitable causes.

It is important to note that there are various types of foundations. Know the differences before making a grant request. Though exact definitions vary, they basically are as follows:

Independent/Family Foundation: Usually funded or endowed by a single source, such as an individual or family. Sometimes limits support to special purposes, such as the founder's designated cause or charity.

Company Foundation: Funded by profit-making companies for the purpose of corporate giving. Often responsive to grant requests from organizations serving employee needs; research in company-related areas, and community projects located near company headquarters, plants, or branch offices. Typically give a large number of small grants.

Community Foundation: Funded by gifts and bequests from many sources who want their contribution to benefit a particular city or region. Gifts may be restricted to a specific agency or field of service.

Operating Foundation: Generally established by a nonprofit to fund its own programs. External grants are unusual.

For more information on foundations, visit the Foundation Center Collection in your area.

CORPORATION

Not all corporations have company foundations to channel their charitable giving. Even those that have foundations often reserve part of their gift dollars for direct allocation by the corporation.

The grantmaking process differs from company to company. In most cases, there is a contributions committee comprised of the chief executive officer and other senior management. It may meet monthly, quarterly, or annually. Some corporations give preference to organizations recommended by branch managers, or charities in which their employees are actively involved. Learn who does the staff work and ask for criteria and deadlines.

The Conference Board publishes an annual survey of corporate contributions. [See the Resource List in this manual for their location.]

COMMUNITY ORGANIZATION

Civic, service, and religious organizations are good prospects for small grants for ongoing programs or special projects. Jaycees, Junior League, Rotary, and auxiliaries are prominent examples. Contact usually is made through the local president or other leader, though some requests may be referred to state or national funding levels. Most likely to be funded are programs that provide for a well-known, shared, community need.

GOVERNMENT

Despite periodic changes in funding policy, **government is still big business.** Government continues to make grants -- large and small -- to nonprofits with creative ideas and aggressive follow-through. Though the emphasis may shift from federal to state or local offices, public funding is available for those interested enough to track it down.

BANK TRUST DEPARTMENT

Banks and other financial institutions manage an impressive number of trust funds of all sizes. In some cases, the investment income is pre-designated for a specific purpose. In others, there may be more freedom for disseminating to charitable causes.

The decision making process differs, but typically includes the donor, family member, and perhaps, a trust officer. A phone call or visit to various trust officers should result in a listing of trust funds and eligibility requirements.

THE GRANTSEEKING PROCESS

Learn as much as possible about grants and grantmakers to increase your opportunities for success. They vary almost as much as grantseekers do. Some discovery clues follow:

- Research potential grantmakers thoroughly. Use the library, Chamber of Commerce, local business and organization directories, yellow pages, government development and program offices. Put your ingenuity to work.

- Regularly review grant publications and periodicals. The Foundation Directory lists foundations according to preferred grant categories (capital, general operating, research) and special interests (art, education, health). The Foundation Index Bimonthly provides updates on current giving. The Federal Register and other government publications announce available grants and application requirements. These should be in the public library.

- Request an annual report and funding guidelines. Review interests and requirements. Note special restrictions and application deadlines and procedures. List the best prospects.

- Make an informal inquiry, by letter or phone, to the top prospects. Briefly describe your organization and need. Offer to send a formal funding proposal. Schedule a preliminary meeting to discuss proposal basics.

- Be realistic about the amount you request. It enhances your credibility and chance for success.

- Be aware that some grantmakers expect to be consulted in the early stages of project planning. This is particularly true of major project sponsors.
- Keep trying. If at first you don't succeed, go to the next grantmaker on the list. Some projects require multiple grants, thus simultaneous submissions to several grantmakers. Most funders appreciate knowing about all outstanding proposals.

- Don't limit yourself to local funding sources. If your proposal is unique, or of national significance, approach major, national grantmakers.

- Send proposals only to grantmakers expressing an interest in the project. Grant applications greatly exceed available funds and staff review capability. Repeated submissions of inappropriate requests may cause reviewers to pass over your proposals for those they know to be on target.

- Consider sharing a grant with another nonprofit. Grantmakers have long joined together to fund community projects. Creative nonprofits are gaining their support by doing the same.

  Example:
  Five cultural nonprofits on Pittsburgh's Northside secured a single grant from Mellon Bank to publish a cooperative inter-institutional brochure promoting educational tours to neighboring facilities. Institutions were individually highlighted, while the overall theme stressed the value of five learning experiences within close proximity. As a result, the single brochure was less expensive, and more effective, than individual ones would have been.

- Get to know the people who make the decisions and let them get to know you.

Good research, followed by a good proposal, will gain you consideration. A great proposal may get you the grant. There are numerous books explaining how to write a grant proposal.
Read several. Use them for reference, along with grantmaker guidelines, as you prepare your request. Though criteria vary, most grantmakers expect a proposal to include the following:

  - Cover letter

  - Proposal Summary (Abstract)
    Limit to one page and include the amount requested, total budget, project purpose, and planned results.

  - Introduction to Organization
    History, general purpose, goals and objectives, accomplishments, service area, and population served.

- Statement of Problem or Need
- Project Goals and Objectives
- Staffing Requirements
  Job description, personal resumes, recruitment and training plans.
- Implementation Method and Schedule
- Itemized Budget
  Program and operating costs, other sources of funding.
- Future Funding Plans
- Appendix
  Support documents, including tax-exempt status letter, board of directors listing, annual report, current operating budget, audited financial statement, recent and current funding sources, (cash and in-kind), and community support letters.

Despite the volume of information required, keep the proposal brief and to the point. Don't beg. You have a legitimate need, prove it. Grantmakers want to know how their money will benefit the community, economy, and their special interest. Tell them in as concrete terms as possible. If you have an emotional story to tell, do it in the appendix, or on a follow-up visit.

Submission of the proposal is not the end of your involvement. There are several ways to remain active in the grantmaking process and enhance your chances for this and future grants.

- Two to four weeks after submitting a proposal, follow up with a phone call to confirm its arrival. Offer additional materials in support of the project. Arrange a personal visit to the grantmaker for further discussion. Invite the grantmaker to visit the site of the proposed project.
- Many corporation and foundation grant decisions are made by a board of directors or contributions committee. Learn when they are meeting and call the day before to provide additional last minute details.
- Grant decisions can take from a few weeks to more than a year. Plan accordingly and be patient, but persistent, in checking your proposal's progress.

- Upon acceptance, remember to say thank you. Also send regular progress reports on the project and other major activities. Keep grantmakers informed of your continuing success.

- Acknowledge rejections with a thank you (for consideration).

- Keep detailed records of all activities, including contacts and payments. Make an activity schedule for report deadlines and follow-up calls. This is particularly important for campaigns of long duration, such as capital fund drives.

PROGRAM-RELATED INVESTMENT

The next best thing to an outright grant is a program-related investment (PRI). Stated simply, a PRI is an equity investment, loan, or loan guarantee made by a foundation to serve a charitable purpose. It is sometimes called a social investment. Unlike grants, PRI's must be repaid, sometimes with the addition of a low interest rate.

Though PRI's vary by type and complexity, a majority support low-income and minority community development programs. Others include temporary advances to educational or cultural institutions for projects expected to become self-supporting and the purchase of stock in a for-profit business that uses the money for charitable purposes. PRI's often are used to leverage broad-based community support for projects that otherwise might seem too risky for a single funder's involvement.

Strict regulations govern the making of PRI's. Foundations must prove that the money is being used only for a charitable purpose, and that the recipient could not have secured funding through normal financial sources. Despite this and other complications -- and the risk of non-repayment -- increasing numbers of foundations are making PRI's.

Before requesting this type of support, get all the facts. Start with the Ford Foundation, a PRI pioneer, and the Cooperative Assistance Fund, a PRI funding pool formed by several foundations.

[Note: Contact the Cooperative Assistance Fund at Suite 701, 2021 K Street, N.W., Washington, DC 20006, 202-833-8543. Contact the Ford Foundation at 320 East 43rd Street, New York, NY 10017.]

ADDENDUM

The preceding excerpt from <u>Discover Total Resources: A Guide for Nonprofits</u> covers the basic areas to be considered when looking for funding from foundations and the government. There are just a few additional points to be made.

1. Involve trustees or other volunteers in contacting foundation representatives. Use the personal relationships between people to give credibility to your proposal.

2. Research is the single most important key to effective grantsmanship. Learn what criteria the foundation follows to assess proposals and realistically decide whether or not your project meets their criteria. Do not waste your time or their's with inappropriate submissions.

3. Stay in touch with potential funders. Even if a foundation turned down one project, if you fit their general guidelines, keep them informed about what you are doing. You may have a project later on that they would consider funding.

4. Make a list of several foundations who could fund your project and submit a proposal to the most likely one. If you are turned down, revise it as necessary and send it to the next. Always be prepared with an alternate plan so you do not waste time starting your research all over again.

5. Consider recruiting a foundation leader or a trust officer for your board of directors.

6. When you are cultivating an individual donor for a large gift, prepare a similar proposal. This increases the importance of the project and helps prepare your volunteer solicitor with answers to any questions that may be asked.

7. Although local, state and federal offices do make grants, you should not depend on them for on-going or long term support. You should develop other funding sources to avoid the financial crises common to groups who rely too completely on government funding.

8. Track down available federal grants by using the Federal Register. Find out who in your community has a copy and ask if you can stop by weekly and look at the newest one. As an alternative, you could form a group with other small nonprofits and share the cost of a subscription. Since all federal grant applications ask for some of the same basic information, keep a photo copy of a completed form on hand at all times. That will help you save time when filling in future applications.

FEDERATED PLANS

Payroll deduction plans sound like an easy way to raise money: it is easy for the employee to give, easy for the employer to collect, and provides easy access for you to a large number of potential donors. It is not necessarily that simple, however. The competition is often intense among the nonprofits who would like to be included and many employers prefer to limit the number of groups who can participate.

UNITED WAY OF AMERICA

United Way of America, known in some cities as United Appeal, is perhaps best known for their national annual campaign to raise money from employees at their workplaces. Agencies that are members of local United Ways limit their individual fundraising efforts and replace them with this annual group solicitation. Volunteers for United Way decide which agencies will be members and administer the solicitation, collection, and allocation of money raised. This is only one way, however, in which United Ways support nonprofit groups.

Two of the other funding strategies available in some cities are the donor option plan and venture grants. Since each United Way is governed by a local board of volunteers, each one decides what funding strategies it will offer. Contact your local United Way to find out what is available in your community.

Donor option enables contributors to designate all or part of their donations to specific tax-exempt health and human-care agencies governed by volunteers, including some that are not formally affiliated with United Way. No two donor option programs are alike but there are several common characteristics.

- The employee completes a payroll authorization card and a donor option form.

- The donor may designate to any 501(c)(3) health or human-service organization that meets general eligibility requirements.

- In many cases, a minimum donation is required.

- United Way determines an administration fee, which is announced and deducted from each designation before the payment to the chosen agency.

Venture grants are available in some communities to non-member agencies. These grants are time-limited, with no commitment for continuing support. The seed money grants are intended to provide short term support for the start-up, development, or stabilization of new and untried agencies or programs. The system building grants are intended to enhance the capacity of existing agencies and service delivery systems -- for example, support of coalitions or collaborative efforts among agencies or sectors.

Since funding programs vary among cities, contact your local United Way for more information.

ALTERNATIVE FUNDS

Alternative funds have also been organized in some areas. They often fund groups that are more non-traditional than those funded by United Way or are devoted to one specific cause, such as the arts. Some of these include the Women's Funding Alliance, the Black United Fund, and the United Art Fund.

COMBINED FEDERAL CAMPAIGNS

The Combined Federal Campaign is the only fundraising program authorized by the federal government to solicit among their employees. It is managed by local federal officials. Agencies who would like to receive information about participating should contact the local United Way.

OTHER RESOURCES

Some local and state governments have similar programs. Contact your local and state government offices to find out what is available.

You can also contact companies directly either on your own or as part of a coalition that you put together and request payroll deduction support. Start with businesses who already have displayed an interest in your group or your cause. If you cannot set up an on-going arrangement, you might find some businesses who will "adopt" your group for a year.

Not all federations or businesses will want to include your group in their payroll deduction plans. Make a list of several contacts and if someone says "no", go on to the next one. If you are persistent and persuasive, you should get some support. Even if you cannot be included in a payroll plan, you may receive a donation from the company itself. At the very least, you have an opportunity to talk about your group to someone new.

MATCHING GIFTS

Some companies have matching gifts contribution programs. Every company sets its own rules, but there are commonalities.

- The employer decides what type of nonprofits it will include in the plan. Colleges and other educational institutions are the most common. Some include fine arts groups, public television and radio stations, and social welfare groups as well as others.

- The employer matches the employee's gift on the basis of a set ratio, such as two to one and, generally, up to a maximum amount.

- The program may be open to spouses and retirees as well as to current employees.

- Approved organizations must approach employees directly, not through the company.

Some programs have other benefits as well.

- Some will match the cash value of non-cash donations such as real estate, artworks, or life insurance.

- Some may match payroll deductions.

- There are companies who make contributions to a group based on the number of hours an employee volunteers there.

- Similarly, Mellon Bank, in Pittsburgh, has a Volunteer of the Month Program to honor their outstanding volunteers. Winners receive a $500 check, payable to the organization for which the person volunteers.

- Companies may also consider their employees' volunteer activities when making corporate contribution decisions.

There are several things you can do to encourage matching gifts contributions.

- Find out which businesses in your community already have such programs. The Council for Advancement and Support of Education (CASE) publishes such a list nationally. (The address is in the Resource List). A public television station or other organization with broad based support may publish such a list locally as well.

- Call local businesses to ask about their policy. Encourage them to start one if they have not done so.

- Print a list of the employers who do make matching gifts and publicize it in your newsletter and your solicitation materials.

- Thank both the employee/donor and the employer each time a gift is received.

Once you have a relationship established with a business, it takes minimal effort to keep it going. Be sure to say thank you for each gift, send an annual update about what you are doing, and add them to your newsletter mailing list. These simple communications will reinforce your relationship. Also, you can take advantage of this opportunity to discuss their corporate contribution as well.

STEP SIX: EVALUATION

The final step in our process is evaluation. You must plan and carry out an assessment of what went well and what went badly in every project as each one is completed.

The evaluation process can most easily be done in a series of questions related to the resources employed and the end results.

1. Did you reach the goals you set for the project during the planning stage?
2. How much money did you raise before expenses?
3. How much after expenses?
4. Where did the money come from -- individuals, companies, foundations? How much from each?
5. What in-kind services and products were donated? What is their dollar value?
6. How many volunteers were involved? In what positions? How many of them were new to your group?
7. What techniques worked best in recruiting volunteers?
8. Who were your best solicitors? Did you talk with them about why they did so well? Did you develop a training piece for other volunteers based on those successful experiences?
9. Do you have a list of key volunteers who should be cultivated for deeper involvement?
10. Did you tap civic groups, service clubs, unions, church groups, etc. for support? If not, could they have provided additional help?
11. Were there too many surprises and crises while implementing the event? Could they have been forestalled if you had done more extensive planning?
12. What were your expenses?
13. Did you try to get everything donated, but were not successful? Were there prospective donors you did not approach?
14. What channels of publicity did you utilize? Did you reach your target audience?

15. Did you raise the community's awareness of your group and your cause through the event?

The final questions:

16. What will you repeat next time you do the project?

17. What will you change next time you do the project?

Special events lend themselves to repetition: an annual festival, monthly car washes, Friday night dances during the school year, etc. But repetition can lead to the event becoming tired and stale and not attracting new people. You can overcome that by adding new aspects to the event. Change something that will add value for the consumer.

- o Add a silent auction to a dinner or casino night.
- o Add entertainment to an ice cream social.
- o Add a fashion show to an afternoon tea.
- o Change the location to somewhere more exclusive.
- o Add a major prize raffle to a business lunch.
- o Add a bake sale to the car washes.
- o Take the car wash to a company's parking lot.
- o Add pledges to your 10K Run.
- o Add a post-party with your concert artist for a larger donation.

Ask what people would like to do and then provide it to them.

Every event or project has an "opportunity lost" cost associated with it. That is, you could be doing something else if you are not doing this. Do not get caught in the comfortable cycle of "we always do it this way".

Use the time after the project is over and the memories are fresh to assess what you do, how you do it, and how successful you are doing it. Then make plans for the next time.

MARKETING

In recent years, many fundraising professionals have begun to apply the techniques of marketing to their efforts. Throughout this book, we have used several of those techniques, such as:

- o segmenting the general public into smaller groups based on some common factor such as wealth, interest, age, or hobby
- o targeting projects at these segments
- o using appropriate publicity channels to reach the groups
- o using research to discover the interests and needs of the prospective donor and designing the solicitation in terms of what the donor gains from giving the gift.

A particularly effective application of marketing to fundraising is differentiating between the "sales approach" and "marketing approach". The traditional sales approach says: "We have needs and they have money. Let's get it from them no matter who they are". A marketing approach says: "Some people are interested in promoting our mission. Let's identify them, research their interests, and cultivate their commitment to our organization. That way, we all satisfy needs that we already have."

CAUSE RELATED MARKETING

One of those prospective donor segments is corporations. The analysis of their needs and how they can mesh with their community's needs as exemplified in nonprofit organizations gives rise to the concept of cause-related marketing.

One of the earliest successful examples was American Express' donation of a penny to the Statue of Liberty restoration fund for every purchase made with an American Express card. In 1987, the Just Say No Foundation was chosen by First Interstate Bank in California as the recipient of $1 for each new account opened during a specified period of time. It was a very successful effort for the bank, the Foundation, the bank employees and the children of California.

How can other nonprofits get involved? First of all, assess the goals of the business you target. What is important to them? Some of these goals could be:

- o Perception as a good citizen.
- o High profits.

- o Hard-working employees.
- o Association with people and causes that are worthwhile to the business' target markets.

Now think about how you can help meet those goals.

- o Are your cause and organization highly thought of in the community?
- o Are the target markets that are important to the business, also people who support your cause?
- o Is your group perceived as supplying an answer to a community problem?
- o Are there opportunities in your group for substantial volunteer involvement?

Brainstorm with some of your volunteers from the business sector. Make a list of businesses you should approach and what you can offer them. Contact the marketing director at the business on the top of your list. Let him or her know you are <u>not</u> asking for a donation. Explain your project briefly and ask when you can meet to discuss it. Take one of your business volunteers with you to give credibility to your idea. If the volunteer and marketing director know and respect each other, that is the best situation.

Remember that traditional corporate contributions come out of profits and fluctuate with the company's fortunes. Projects like that of First Interstate are funded out of the profits that your cooperative project generates. It is clearly a win-win situation for all involved.

PUBLIC RELATIONS

Creating a positive image of your group in your community is a critical part of your job -- no matter if you are a program volunteer, a trustee, a volunteer fundraiser, or a paid staff member. Community awareness creates a climate in which you can raise money. Awareness and support are inextricably linked.

It is much easier to raise money from people who know who you are and what you are doing to solve a community problem. Think about fundraising in terms of friendship. If you need a favor, you ask a friend and not a stranger because a friend is more likely to do what you request. But it took time for your friendship to develop -- everyone is a stranger at first.

When you apply this to fundraising, you can see why it is so important to be well known among those people whom you have targeted as prospective donors. At first your prospects are friends, neighbors, parents, teenagers, church members -- generally people that you and your volunteers know. You can educate them quite easily through personal contact. Once you start expanding your prospect list, you have to find less personal ways to contact them in groups. Here is where effective use of the media becomes critical. The following section is devoted to how you can use the media to deliver your message and educate your prospects.

MEDIA

One of the most effective ways to reach and involve the community is through the print and broadcast media.

Through the media, you can promote positive efforts, expose dangerous situations, and solicit participation in your cause, which includes generating financial contributions.

It may be helpful for you to remember that your communication to the media is the basis of your communication through the media to the public. Understanding normal channels of newsgathering and dissemination will help you to do both more effectively.

THE MESSAGE

For instance, a basic message to be communicated through the media about alcohol and drug use by youngsters is that it is unhealthy, illegal, and unacceptable and that any situation which contributes to use is detrimental to the community as a whole and will not be tolerated. Community support for drug abuse prevention efforts should also be emphasized as responsible and rewarding work for adults, whether they are parents or not.

FORMS IN WHICH THE MESSAGE MAY BE CONVEYED

There are a variety of communication channels appropriate to print and broadcast media.

1. News Story: It can be as short as a couple of paragraphs in print or a few seconds on the air.

2. Feature story: A "human interest" story or "soft" story which is sometimes produced well in advance of publication or broadcast.

3. An editorial or editorial reply: Print or broadcast media may espouse or endorse your point of view or permit a spokesperson from your organization to present your point of view on the air or in print, if it differs from that of the station or paper.

4. Letter to the editor: Newspapers and magazines often print letters to the editor commenting on articles or editorials which they have run in the past or on issues of interest to the community.

5. Op-Ed articles: These are essay-like articles, with by-lines, which frequently appear on the page "opposite the editorials," hence the name.

6. Public affairs programming: Broadcast media are encouraged by the Federal Communications Commission to devote a portion of their air time to "public service" or "community affairs" programming which may range from a one-half hour talk show to 10-second spot announcements.

BUILDING A MEDIA LIST

The key to getting a story into a newspaper or on to radio or TV is to learn who in each of those organizations is most likely to handle the request for coverage.

Make a list of newspapers (daily or weekly) in the community, as well as the TV and radio stations. Which reporters generally cover stories on education, drugs, mental health, law enforcement, or community activities? Most news organizations assign reporters such "beats." If you cannot identify which reporter is most likely to cover the story, call the station or paper and ask to whom news releases or calls should be directed. In some cases, you will be told to address information to a news director or assignment editor who will then funnel the information to the appropriate reporter.

In some communities, a media directory is compiled, often by an organization involved in the communications industry. Your local Public Relations Society of America chapter should be able to tell you if one exists for your area.

COMMUNICATING

The basic tools of initiating the communication to the media are: telephone calls, news releases or letters from your organization's representatives to the press. Each of these can be effective, but none are guaranteed to generate coverage.

Calling a reporter to introduce oneself or to suggest a story is often a useful way to obtain attention, but understanding a few "rules of the road" may help.

- o You should always ask the reporter or editor: "Are you on deadline?" If the answer is yes, and your conversation is not urgent, you should ask the reporter when it would be convenient for him/her to talk and volunteer to call back. The reporter will probably appreciate the consideration, as well as be more likely to devote time to you and your story later. (Afternoon papers are usually on deadline in the late morning. TV stations are usually rushed in the late afternoon).
- o Fresh ideas and specific stories are more likely to spark an interest than "let's do something on drug abuse." You should be prepared with concrete suggestions when you call a reporter.
- o If you call the press about a story which may deserve immediate reporting, you should be prepared with all the facts -- names, dates, times, places. An articulate teenager can be an effective spokesperson for your group.

LETTERS SUGGESTING STORIES

On some occasions, you may wish to write a station or newspaper to suggest a series on the hazards of alcohol or to encourage coverage of a conference on drug abuse or some other story. Although more personal than a press release, such a letter should still be constructed to snag the reporter/editor's attention in the first paragraph and to convey important information succinctly. In communicating with reporters, it is generally advisable to assume that they are in a hurry.

NEWS RELEASE

The news release is the basic tool of communication used to alert the media to an upcoming event, to make a statement or to tell the story of a past event. Standard rules for construction of a press release are:

1. Releases should be on letterhead, with the date of issue and either "For Immediate Release" or "For Release on ________" in the upper left corner to indicate on what day material may be printed or broadcast. The name and telephone number of a contact person available to provide more information should also appear.

2. Text of the release should be typed, doubled-spaced, with wide margins.

3. News releases should be written in the inverted pyramid style, with the most important information in the first paragraph and less important information following. (Many editors "cut" stories from the bottom up.)

4. When writing a news release, you should try to follow the old journalist's formula of answering six key questions about the story in the first paragraph of the release. The questions are: Who? What? When? Where? Why? and How? Editors and reporters are usually busy and receive scores of news releases each day, so capturing their attention in the first paragraph is essential.

5. At the end of the release, center either "30" or "#" to indicate that you have finished.

News releases may be either mailed or hand delivered to reporters or editors. Morning receipt is usually best. If a release is announcing an upcoming event, it should be in the reporters' hands 48 hours in advance.

SAMPLE RELEASE

OAKBROOK SCHOOL SYSTEM

Frederick Smith, Director

555 North Main Street

Hometown, OK 00000

September 10, 1988 | For Further Information

For Immediate Release | Contact: Dale Jones 355-6666

NEW DRUG AND ALCOHOL PREVENTION PROGRAM

"We are committed to reducing the drug and alcohol use in our schools by implementing new and consistent policies, expanding our drug education curricula, and enlisting the support of our community," declared Frederick Smith, Oakbrook Superintendent of schools, in his opening remarks to the Oakbrook Parent Teacher Association. The Association met in the auditorium at County High School on Wednesday evening, September 10, 19__.

Mr. Smith distributed copies of the school district's new "Student Behavior Handbook," which each junior and senior high school student in the system will receive during the next two weeks. The handbook details the school rules on use and possession of drugs and alcohol and describes the consequences --including suspension and expulsion -- for violation of those rules. "We urge both students and parents to become familiar with the program detailed in the handbook, because those policies will be enforced throughout our system."

The superintendent also encouraged parents to establish parent peer groups in which they could share concerns about their children, monitor social activities, and establish consistent curfews and other rules.

"We have not experienced major problems with drugs in our school system," Dr. Smith said, "but we are taking these steps to prevent that situation from arising and eroding the educational environment in our schools."

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EDITORIALS

Broadcast media generally endeavor to give fair exposure to both sides of controversial issues in the community. Editorial directors are often burdened by having to seek out suitable issues or spokespersons, and may welcome suggestions from viewers or listeners.

There are two ways in which you may get your viewpoint expressed on the air.

The first course is to write or call the station's editorial director and persuade him or her that a particular issue deserves editorial coverage. The most desirable outcome of such contact, of course, is for the station to share your point of view and present it editorially.

If, by chance, the station presents the issue but advocates a point of view different from your organization's, you may ask to respond with a broadcast editorial reply.

Tips for preparing to tape an editorial reply include:

1. Keep copy simple and to the point. Cut out all extraneous words and phrases.

2. Rehearse thoroughly.

3. After the reply is recorded, review the tape. Could it be improved? If so, ask the director if it may be re-recorded.

LETTERS TO THE EDITOR

You may write letters to the editor of newspapers or magazines about stories or editorials which have appeared or issues which you believe should be covered.

Letters to the editor should be concise and specific. If the letter refers to a previous article, the letter should cite its title, author, and date of publication. Remember, publications often print letters critical of pieces which they have run earlier, but it is vital that the letter be well-written and to the point.

"OP-ED"

"Op-Ed" pieces are by-lined articles which generally appear on the page "opposite editorials," or on some other page separate from other news. "Op-Ed" pieces are more like an essay than a letter and run anywhere from 500-2,000 words, depending upon the publication. "Op-Ed" pieces usually focus on one idea and endeavor to leave the viewer with a new perspective or analysis of an issue to consider. A strong lead paragraph which clearly states the theme is essential. Subsequent paragraphs should contain supporting facts or new ideas.

PUBLIC AFFAIRS PROGRAMMING

The Federal Communications Commission licenses broadcast stations and encourages them to devote a portion of their air time to "public service" or "issue sensitive" programming.

You can ascertain how each station allots its public service time by contacting the director of public or community affairs at each station. You may suggest a theme for public service programming such as "alcohol-free proms" or "drug-free sports" and offer to assist the station in selecting spokespersons or panelists for programs. When selecting such a campaign, you should be prepared with strong arguments concerning the importance of the issue.

If, for instance, you are suggesting that the station adopt alcohol-free prom week as a theme for programming, you should be able to cite statistics on alcohol related accidents involving young people, on how many students are expected to attend proms, etc. You may be able to voice your point of view on community service talk shows or by recording public service announcements which the station can air at various times during its broadcast schedule. Students are often effective speakers.

INTERVIEWS

Whether appearing on a talk show or on a TV news program or meeting with a print reporter, you or your representative dealing with the media is likely at some point to be interviewed. Remember that an interview is not a social conversation. A reporter is asking questions because he or she wants a good story and you have agreed to present your organization's view. A bit of preparation before being interviewed can result in a better presentation and an improved story.

1. Know exactly what points to convey. Listen for opportunities to reiterate your point.
2. Anticipate key questions and prepare answers.
3. Refrain from getting angry with the reporter. Maintain composure and pause before answering, if necessary.
4. When responding to a question, state the main point first, add supporting arguments later.
5. Listen to the question being asked. Request clarification of the question, if necessary.

PRESS CONFERENCES

Calling a press conference should be reserved for truly significant, newsworthy events. If you determine that a story is important enough to warrant a conference:

1. Copies of news releases, background material and visual aids should be available for each member of the press.

2. Individuals speaking at the conference should be thoroughly prepared with succinct statements and answers to any possible questions.

3. Radio and TV reporters need plenty of electrical outlets for tape recorders, lights, and cameras. Press conferences should be held in rooms with adequate seating and plenty of outlets.

MEDIA AS FUNDRAISERS

The media can play an active role in fundraising.

- We have already talked about their role as the sponsor of a 10K run. They provide publicity before the race, an on-air personality at the event, and print t-shirts for you to sell.

- When you make a public service announcement, you can include a line such as "Help us help kids with a gift to EDUCATE at 1512 Main Street, Anywhere, USA 00001." Be sure that the stations will air your PSA with such an appeal before you tape it because they may have a policy against airing fundraising appeals on public service time. Contact the Community Affairs Director at the stations before you use this suggestion.

- Every time you are interviewed, request financial and volunteer support. Keep the public aware that you need their help to be successful.

SPEAKERS' BUREAU

Take advantage of the opportunities you have to present your cause to groups of people. Target those groups who can make some kind of contribution: sponsor an event on your behalf, make a financial contribution, give you their membership list for a mailing, supply volunteers, buy audio-visual equipment for you or pay for busses to take teens to a Drug Free America walk or rally.

Plan on doing at least one speaking engagement every month as part of your annual plan. In some months you may not be able to do any and in other months you may do several, but you need to set a goal or it becomes one of those things that gets lost in other activities.

Draw up a list of places you would like to speak and call them. Some of these are:

- civic organizations
- political organizations
- unions
- church groups
- fraternities and sororities
- Junior League
- League of Women Voters
- Jaycees
- Rotary Club
- Chamber of Commerce
- Bankers' Club
- CPA Association
- Bar Association

Someone in your community may publish a list of civic/social/professional organizations. Contact your Chamber of Commerce to see if they know anyone who has done so. You could also check with the public library to see if they have any such reference publication. If you want to schedule 12 events, have a list of at least 18 groups to call. If someone says they are booked up, you just go on to the next one.

When you call, ask if the group has a community affairs committee, or a charity committee, or a volunteer committee, or a philanthropic budget. If they do, ask if you can get on their schedule to speak at the meeting. Some groups plan their schedules well in advance while others are month-to-month. Be as accommodating as you can be in choosing a date.

Be prepared to say what you have to offer as a speaker. You should have a 10-15 minute video or slide presentation of your group's activities to show the audience what their contribution will support. Bring one of your teens or clients along to talk about the presentation. He or she can be an excellent spokesperson.

Find out ahead of time the size of the audience and take enough brochures and membership forms for everyone. Ask if you can "pass the hat" after your talk. If not, can you have a membership list so you can solicit them through the mail?

You may not want to limit your speaking engagements to those who are willing to offer volunteer or financial support. You may feel that you should spend your time educating people about your cause with no expectation of anything in return. Just remember that anytime you do one activity, you have lost an opportunity to do something else. If you really need volunteers and money, and you have limited resources, concentrate your efforts first on those goals. When you are better able to do so, you can expand your efforts to pure education with no thought of any other return.

ACTION PLANS

In the preceding sections of this book, we have discussed the use of specific fundraising techniques and the importance of planning to a successful program. This section has step-by-step plans for doing two different fundraising events. Each includes a weekly action plan which must be done for every multi-task project you undertake, and an expanded plan that explains in more detail what is required.

Plan backwards whenever you are planning an event. The event itself is "day zero". Figure out how long it takes to do any task and put that in the appropriate preceding week. If something can go wrong, it probably will, so be realistic and not optimistic when setting the interim dates.

The first event is a 10K Run that does not include asking the runners to get pledges. That would be a great addition the next time the event is done. The audience is all runners, whether or not they support your cause. The minimum timeframe is at least four months and could be longer, depending on how long it takes to recruit volunteers and how long it takes to get printing done.

The second event is a business person's lunch which could be designed as a straight-forward fundraiser hosted by a celebrity, as a speech by an authority on something, or as a tribute event with a separate host and honoree. The plan is set-up for the last choice, but could be easily adapted to the others. The real key here is the celebrity you choose. Since your audience is business people, the celebrity must be someone who that audience wants to meet and to associate with personally. For the purposes of this plan, we are choosing a politician as our celebrity.

10K RUN

Action Plan

Date	Who	Activity
Week 24	Staff	Mail date to joggers newsletter/calendar
Weeks 15-16	Staff	Write chairperson's job description
		Choose 2-3 dates
		Compile information for recruitment
Week 15	Staff	Recruit chairperson
Week 13	Staff	Meet with chairperson
	Chairperson (CP)	Recruit committee chairs
Week 12	Staff	Mail letters to
chairs for meeting		
Week 11	Staff & (CP)	Meet with committee chairs
	Staff	Send notes within 24 hours
Week 10	Sponsor Cmtee	Recruit media & corporate sponsors
	Location Cmtee	Choose location
	Trophy Cmtee	Decide categories
	Publicity Cmtee	Design printed materials
Week 8	Staff	Order printed materials
Week 6	Location Cmtee	Get all permits
		Check out insurance
Week 4	Red Cross Cmtee	Contact Red Cross
	Publicity Cmtee	Contact jogging clubs
	"	Handout entry forms at races
	"	Mail flyers to school track coaches
	"	Mail flyers to mailing list
	Trophy Cmtee	Order prizes

Week 3	Publicity Cmtee	Hand out entry forms at races
	Staff	Recruit someone to take slides or videotape the event
	"	Send letters to committee for meeting
Week 2	Publicity Cmtee	Hand out entry forms at races
	Staff	Put up posters or flyers in business
	Publicity Cmtee	Send notices to community calendars
	Staff	Call committee people who have not RSVP'd
10 days	Staff	Checklist
9 days	Staff & (CP)	Meet with committee chairs
8 days	Staff	Send meeting notes
Week 1	Publicity Cmtee	Hand out entry forms at races
Race Day	Staff & Volunteers	Check lists
+Week 1	Staff & (CP)	Send thank you letters
+Week 2	Staff	Wrap up volunteer meeting

10K RUN

Expanded Action Plan

Weeks 15-16

Write a job description for the chairperson and print it on your letterhead.

CHAIRPERSON FOR 1988 10K RUN
Sponsored for EDUCATE

The chairperson is the chief volunteer for the 10K Run in 1988. The major responsibilities are to recruit, organize, and lead the other volunteers to have a successful event.

The goal of our first 10K run is net income of $2000 from entry fees, merchandise sales, and the sale of soft drinks and snacks.

The chairperson will:

1. recruit vice-chairpersons for each committee
2. attend meetings with staff (approximately three meetings of one hour each over a six month period)
3. contribute to setting plans, goals, budgets, etc.
4. chair meetings with volunteers (approximately three meetings of 1 1/2 to 2 hours each over a six month period)
5. solicit sponsors for the race from the media and business sectors
6. provide enthusiastic leadership to volunteers
7. serve as spokesperson to the media for the event
8. sign solicitation and thank you letters

The Executive Director of EDUCATE will provide all the support required by the chairperson including help in the solicitation of sponsors and the clerical support work.

The planning, execution, and evaluation stages of the 10K Run will last about six months. Most of the activity will be within four weeks before the race and two weeks afterwards.

Choose two or three tentative dates that are not already scheduled for similar events. Rank them in priority order.

- Call a sporting goods store that caters to runners and ask how to get in touch with jogging clubs or someone who is in charge of another scheduled race. Tell them what you are planning and you may get a volunteer or two.

- o Call the jogging clubs and ask for a race calendar for the season. A 10K run is a good warm-up before a marathon. Do not schedule your run for the same day as a well-established race.

- o Talk to school track coaches and ask for a copy of the track meet schedule for the season. Ask if he/she would be interested in an inter-school competition if your race is just before the season starts.

- o Call the Chamber of Commerce and ask if there are any races on their community calendar of events for the dates you are considering.

Have information ready to answer questions from the candidates for chairperson. You may not have all the answers, but you should sound like you have at least thought about them. You want these people to respect your role as a spokesperson for EDUCATE and as a fundraiser -- do your homework.

- o What is EDUCATE?

- o What is the event?

- o Have you done it before--when--successful or not?

- o When is it?

- o Who else is involved?

- o Where is it?

- o How many joggers are you expecting?

- o How much are you charging?

- o How much money will you make?

- o What do I have to do?

Be prepared to send them information in the mail that day: a personal note saying "thank you" for considering the opportunity (or for accepting), a brochure, the last annual report, and this year's budget.

Week 15

Recruit a chairperson or co-chairs for the 10K Run, preferably someone who is a runner and a supporter of your cause.

- o Ask trustees for suggestions

o Call the jogging clubs

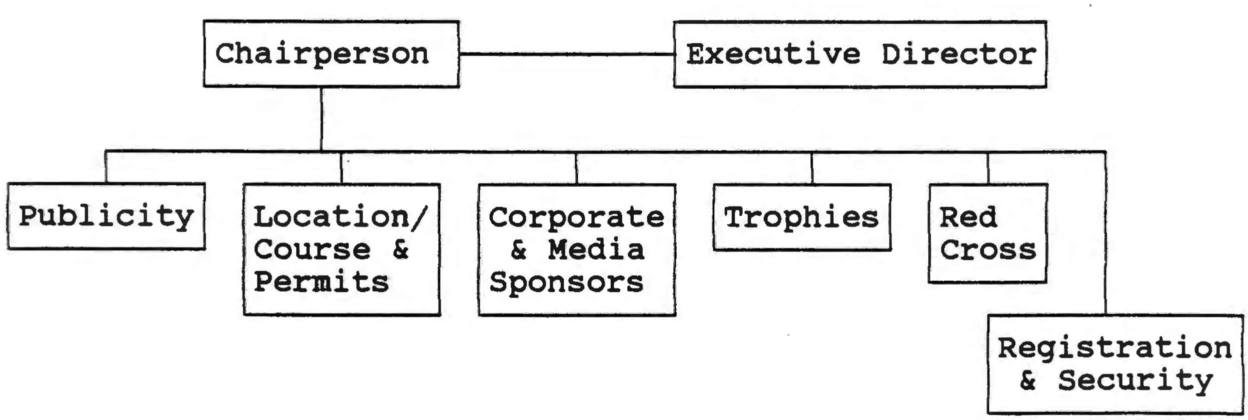
o Call the track coaches

o Discuss the list of prospects with your trustees and see if they know of anyone. If no one has any strong opinions, start making phone calls to get acquainted. Tell each one that he/she was suggested as an organizer for the 10K run--not the chair. After you have talked to each and have a list of those interested, choose your chairperson from among them and ask him or her. Be prepared to say that he or she can choose a co-chair if that makes it easier to accept. If the answer is still "no" to chairperson, ask what role they'd like to play and go on to the next name on the list. If none of these people are supporters of your cause, and do not want to be in overall control, you will need to recruit a trustee to be the chairperson and let the volunteers do the work. If you cannot get a trustee to chair it, forget the idea. You must have the active support of your board for every fundraising project.

Week 13

Meet with the chairperson and review the plans you have made.

o organization chart



o names of people who are interested in being volunteers: you bring names of those you spoke to and the chairperson brings a list of friends he/she suggests; decide who calls them and when the calls need to be completed

o discuss the race dates and reprioritize if necessary

o discuss possible sponsors

- o you should bring to this meeting an action plan of what needs to be done in each week before the race
- o schedule next meeting with committee people

Week 12

Mail letters to all committee chairs

- o thank them for joining
- o send brochure
- o send instructions on location and date of the meeting
- o can be signed by you, but better by the chairperson

Week 11

Meet with committee chairs and other volunteers recruited so far

- o introduce selves (where work, are they joggers, previous race management experience)
- o you hand out a printed agenda on letterhead

> 1988 10K RUN for EDUCATE
>
> date and time
>
> AGENDA
>
> - o Welcome by John Smith, Chairperson
> - o Explain EDUCATE, Executive Director
> - o Introduction of volunteers
> - o Overview of committee responsibilities, Executive Director
>
>   1. publicity
>   2. location, course and permits
>   3. sponsors and concessions
>   4. trophies
>   5. Red Cross
>   6. registration and security

o Dates of meetings, John Smith

o What needs to be done by next meeting, committee chairs

o Adjournment

You and the chairperson should keep in touch with each volunteer as needed. Some will require more support than others.

Send meeting notes to everyone involved within 24 hours, whether they attended or not. Distribute the notes to your board as well. Include a committee roster with preferred mailing address and phone numbers.
Week 10

Recruit sponsors

o does someone on your board or the committee know the general manager of a major TV or radio station and will he /she ask them to underwrite and publicize the event; if not, make a list of the possible stations and start making phone calls; use the same information list you put together when calling for a chairperson, but now you have more facts.

o this sponsor will
-publicize the run on the air repeatedly

-send an "on-air personality" to broadcast from the event and emcee the awards' ceremony

-purchase and print t-shirts and/or caps that will be sold at the event to make money

o decide what concessions you will sell and their prices; food, drinks, t-shirts, caps

o make a list of the other donations and how much of each you need; ask joggers what they expect at a well-run race
-a cooler and electricity
-food
-drinking cups, plates, napkins
-banners
-printing: posters, flyers, etc.

- make a list of businesses that can provide them; ask one large company to supply it all and make them co-sponsors along with the radio/TV station; print those two names on everything along with EDUCATE; if no one will do the whole thing, then list the ones who do donate as "donors"; if someone turns you down, go on to the next name on the list; they need to commit early to get full publicity value for their donation on all the printed materials.

- as soon as someone agrees to donate something, send them a letter thanking them and specifying what the donation is, who will pick it up or deliver it, when it will be needed, when you will confirm the final quantity (if that is in question)

- keep precise records of who you asked for what; what the answer was; if they're donating, list all the above details; start a list of pickups and deliveries that will need to be done at the last minute

Choose a location and design the course

- this vice-chairperson must be an experienced jogger or be able to recruit one as this is a critical job

- contact all local authorities who need to issue permits for the course; these may include the police, park service, or general municipal government; if you are in doubt--make the call; get all the permits and bring them to the race; contact the Board of Health if you have food or drinks; ask about insurance

- is there enough parking and room for spectators

Decide what trophies should be offered such as: overall winner, winners in age ranges, youngest finisher, school team that finished with best average time, etc.

- what kind of trophies -- statues, award certificates, cash

- can they be donated

Design all the publicity pieces with a consistent logo and theme

- posters, flyers, entry forms, banners, receipts, t-shirts, caps, press releases

- the flyers, entry forms, and receipts can be designed with a desktop publishing program on a home or office computer and save the cost of typesetting

- Executive Director has to approve these designs

Week 8

Order the printed materials eight weeks before race if printing takes four weeks to be completed

Week 4

Contact the Red Cross about having their personnel and equipment at the race

- o is there a charge
- o how many do you need
- o should they be on the course or at the start/finish line
- o come to an agreement with them

Mail flyers to school track team coaches with entry forms. Encourage students to sign up as teams.

Starting this week, go to other races and hand out entry forms for your race. Do this up to the week before your race.

Contact jogging clubs to tell them the date and mail sufficient entry forms and flyers to each.

Week 3

Designate someone to take slides or videotape the event for use on speaking engagements.

Send letters to remind committee about next meeting and general topics of discussion; request a reply.

Week 2

Send notices to community calendars in the media.

Put up posters or flyers in businesses, especially those catering to joggers.

Call committee people who have not responded.

10 Days

"Ten days before checklist": as many of these items as possible should be done by volunteers who can call you with problems; the meeting is the final pre-event report session.

- o call businesses about donations
- o confirm the cooler and electricity
- o confirm prizes will be ready
- o check where the registration and concession tables are coming from
- o contact bank for cash boxes, start up change and deposit slips
- o finalize the "pick-up" list and give a copy to everyone involved
- o confirm Red Cross
- o confirm who the DJ will be and will he/she bring all the equipment needed
- o ascertain who has starting flag or gun
- o verify insurance coverage
- o verify that you have all your permits or call and ask where they are
- o check total registrations--is there enough food and drinks ordered
- o remind the photographer
- o walk the course with someone who races and check for last minute problems

9 Days

Meet with committee and provide a printed agenda. The chairperson runs the meeting and each committee chair gives a progress report. Any problems are discussed and resolved. The Executive Director provides whatever staff input is needed and takes notes.

8 Days

Send meeting notes to everyone invited. Be sure the board gets copies too.

Race Day

Day of the race arrive several hours in advance along with as many volunteers as you can get. Provide coffee and doughnuts for them.

- o bring aspirin, cheap pens, clipboards, lined paper, waterproof markers, scotchtape, poster board, masking tape, string/twine, thumb tacks, hammer and nails, pliers, scissors, heavy duty stapler, and anything else you may or may not need

- o be sure you have someone designated as a "go-fer"; they need a car and a good sense of where to find places and things; you must never leave the area

- o bring all the entry forms--empty and complete; t-shirts, caps, etc.

All your staff and volunteers should wear ribbons so people know who to ask for help.

Volunteers have to be at the registration desk at least 1-1/2 hours before the race. They need the entry forms for those already registered and blanks for the people who have not signed up ahead of time. They are also in charge of selling the t-shirts and caps. They need a money box and change to start the day.

You need some security people because you will be handling money at the race and you need to deposit it that evening.

- o does someone know a policeman or private security person who would donate the time; if not, find out what they would charge

- o contact the local police federation and ask about a volunteer

- o find out if your bank has a night deposit and how to use it

- o your guard must stay with you while the two of you count the money, make out a deposit slip, and deposit it in the bank

TRIBUTE EVENT

Action Plan

Date	Who	Activity
Week 26	Staff & Chairperson	Set up steering committee (SC)
	SC	Decide on event
Week 24	SC	Recruit honoree
	"	Recruit host
Week 16	SC	Finalize location and date
Week 9	SC	Decide menu, flowers, etc.--all expense items
	"	Set ticket prices and program ad levels
Week 8	SC	Start soliciting underwriters
Week 7	SC	Plan overall publicity campaign
	"	Order printed invitations
Week 6	SC	Place feature stories
	"	Compile list of invitees
Week 4	Staff	Issue invitations
	"	Draw up room arrangement chart
	"	Purchase guest book and have it personalized
Week 2	Staff	Start name tags and table signs
	SC	Finalize the agenda
	Staff & SC	Complete the program and send to the printer (all ads must be in by now)

Day 1	Staff	Checklist
- 0 -	Staff & SC	Checklist
+Week 1	Staff & Host Staff	Thank everyone Mail programs to contributors who did not attend
+Week 2	Staff & SC "	Hold evaluation meeting Start planning next tribute event

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TRIBUTE EVENT

Expanded Action Plan

Week 26

Recruit a steering committee of top business people such as a bank president, the managing partners of CPA and law firms, the president of a public relations firm, and the president of the biggest employer in town. There should be someone on your board who can make these contacts on your behalf and chair the steering committee. This committee will decide who to ask to be the honoree and who the host will be.

Decide what kind of event you will have. The basic choices are between a day event for business people and an evening event that includes spouses. A breakfast, coffee, or lunch is best for business people because they do not interfere with their family time. For example, we are doing a lunch. Remember that you want an event that you can build upon in future years. A lunch could be expanded with a preceding reception including a more private meeting with the honoree--for a higher donation, of course. You can add a silent auction or a raffle to a social event to increase the money you raise. You can also add entertainment to attract a larger crowd.

The event does not have to be a tribute. The host can plan a lunch or dinner in honor of your group. Or, a "roast" of your host or a celebrity can be a fun event.

Week 24

The single most important decision you will make is the choice of your honoree. In our example, this is a politician. Aim as high as you can. Your potential ticket buyers are mainly corporations and lobbyists so you need to decide who they will pay to meet. Your Governor, Lieutenant Governor, Senator or Congressman are good choices, but it could be a state legislator or your Mayor. The bigger a "draw" your honoree is, the more money you will bring in. A non-politician celebrity such as a show business or media personality may not be able to attract as many ticket buyers unless the event's host is someone local everyone wants to know. You should be aware of the celebrity/politician's position on your issue, but you do not have to research how he or she voted on every bill. The important factor is how popular and powerful they are so they can command a large audience.

You need a host for your event--someone to issue the invitations, encourage people to attend and emcee the event itself. Your honoree may want to recommend someone or you can suggest names of the politician's supporters within your community who also convey a positive image about your cause. The host should be recruited as soon as possible after the honoree accepts.

Week 16

Choose two or three possible dates that do not conflict with any other important business function. You might want to use this event as the kick-off or wrap-up of your annual campaign which will influence the date you choose. Also, the schedules of your honoree and host will impact your decision.

You will need to have an estimate of the number of people attending and some alternative dates when you start looking for a location. Many popular places are booked months, or even a year, in advance. Having several possible dates enables you to be more flexible when booking a room. Shop around for a place with food and drinks and service that will make people feel they received fair return for their contributions. Decisions about where the event is held and how much the tickets cost cannot be made independently from each other.

Consider the availability of sufficient parking and how close the place is to where your attendees work. Make it easy for them to attend. Private clubs, restaurants with banquet rooms, historic buildings, and hotels are all good locations for a tribute lunch. Ask about lower rates since this is a fundraising event, but do not be discouraged if they say "no". You can recruit sponsors to pay the bills. If you want to use a building without food service, such as an historic home, and hire a caterer, talk to your local Board of Health about what inspections and permits may be required. Do this now, before you issue your invitations.

Week 9

Plan the menu and beverage service once you have a location. Work with the banquet manager or caterer and your committee to select an appropriate menu. Some communities may require a "meat and potatoes" meal while others prefer a lighter menu. Decide what to do about serving alcoholic beverages. If your cause is anti-drug or alcohol abuse, you may want to skip alcohol entirely. Be particularly careful if any members of the media will be present. You could serve non-alcoholic tropical drinks or a mock champagne punch which makes a statement about how strongly you believe in your cause. Local custom and the values of your group will be the deciding factors in your choice.

You can issue invitations in various formats. One way is for the host of the event to send personal letters to the CEOs or presidents of businesses and invite them to buy tables or individual tickets. The letters should be on the host's business letterhead and mailed in a matching envelope although your clerical staff can actually print the letters and envelopes for the host. Another method is to send a formal printed invitation. A third choice is to call on the companies' chief executives in person and ask for their support. This can be done by staff or volunteers.

Regardless of how you issue the invitation, provide a reply device that offers the full range of donation choices. This could include the following ideas or others that are appropriate in your community.

1. Buy a table of ten for $1500 and get a listing in the program for the additional cost in excess of that for 10 individual tickets.

2. Buy one or more single tickets at $100 each.

3. Buy no tickets, but make a contribution of $250, $500, $1000 and get a quarter, half, or full page program ad.

4. Make a contribution only.

If the host's office can handle it, all the replies should go there and his/her staff should make follow-up calls to those who do not respond. Otherwise, your office should do these things. You also have to send receipts from your office to everyone who donates in any way. If the checks are going to the host's office, make arrangements to pick them up at least twice a week so you can deposit the money and issue receipts. If you can, do this daily.

Some states have laws regulating the solicitation of contributions by nonprofit organizations. Some of the regulations say that the invitation must clearly state how much of the ticket price can actually be called a "donation". In other words, if the per person cost of the event to the organization (for food, etc.) is $35 and the ticket price is $50, then the invitation must say that $15 of your check is tax deductible. The regulatory agency varies among the states, but you can start by contacting the State Attorney General and asking for your state's requirements.

Consider several factors when you set your ticket prices. The honoree is the critical one, but the location and date are important as well. Ask your committee what has been charged for similar events, figure out what expenses you will have to pay, how many tickets you can sell, and then set your prices. There should be two ticket prices: one for individuals and a second for a company buying a whole table. You could charge $50 to $100 for a single ticket and $1000 to $1500 for a table of ten. For an additional cost on a table, list the company name in the program. Just in case you cannot get anything donated--food, beverages, travel and hotel accommodations for the honoree and his/her traveling companions, printing--set the price so you at least break even. If you cannot figure out how to set the price high enough to cover the expenses and yet attract sufficient attendees, reconsider doing the event at this time.

There are two important goals to keep firmly in mind.

1. At a minimum, break even.

2. Everyone attending should have a good time so they want to attend your next event.

If these goals are not reachable, try a different event.

Week 8

Decide what can be donated in-kind and what needs to be underwritten by a cash contribution. Let us assume that a hotel will donate a suite and meals, a marketing agency will donate the graphic design and printing, and favors will be donated by a local business.

Make a list of businesses who can underwrite all or part of the remainder. If you think one company can do it, approach them for it. Decide what you can offer them in return for the contribution. Some suggestions are:

- a personal meeting with the honoree before the lunch
- a seat at the head table
- a full-page in the program (that otherwise costs $1000)
- promotion as the event's "underwriter" on the invitations and all publicity
- presented at the event as the event's "underwriter"
- one or two "free" tables for their executives

If you do not have anyone who will underwrite the whole thing, ask two or three companies to do it. As above, decide what premiums you can offer them. They should not get everything you offered to the sole sponsor.

If you chose your steering committee well, you may find all your sponsors there.

Make a list of all the expenses that you will incur.

- food and beverages
- location rental fee
- decorations (flowers, table linens)
- transportation for the honoree and traveling companions
- accommodations for the honoree and traveling companions and any meals they incur
- graphic design and printing (invitations and programs)
- postage (invitations and receipts)
- awards for honoree and gift for host
- insurance, if you are using an unusual site
- Board of Health and other permits

Week 7

Decide how you will publicize the event. You probably want to send out a press release when your plans are final and include a name and number for more information. After it is over, you should issue a release reporting on the amount of money raised. You can send the press releases to:

o local business magazines and newspapers

o city magazines

o the business or lifestyle section of your daily paper

o the public affairs or government affairs directors of companies

o the Chamber of Commerce

o the Rotary Club

o look in the yellow pages under "Associations" for a list of trade associations in your area, or call the Chamber of Commerce or Board of Trade

o appropriate political organizations

Work very closely with the press staff of any politician. If they ask to take charge of all media involvement, be sure they understand the cause you represent. Obviously, their first concern is the politician, but they should make some effort to represent you accurately as well.

Week 6

Make a list of all the people you will invite to the event. Ask the honoree's staff who they want invited. They want this to be a success as much as you do. Figure out how many people the place will hold and issue invitations to half again (150%) as many because not everyone will come. However, if you have an extremely powerful honoree, such as the President or First Lady, you may get 100% response. In that case, be sure your ticket price is high enough to make the event an exclusive "hot ticket". Be sure that all the names on the list are spelled correctly, that their titles are accurate, and that the addresses are complete. If you are sending letters, the host, not the honoree, must review the list and put in the first names of everyone he/she knows personally for the salutations and the host will sign each letter personally. Produce each letter of invitation on a letter quality, ink jet, or laser printer of high quality. Do not try to save money by having a blanket invitation pre-printed without personalization.

If you want to place a feature article, think of a news "hook" that will interest the editor. For instance, if you are honoring the Lieutenant Governor for his work in alcohol abuse prevention, a "hook" would be the fact that a close relative is or was an alcoholic and the effect on the Lieutenant Governor's life. On the other hand, you could be involved in an event honoring a Senator because of the business expansion he brought to the state and your alcohol abuse prevention group is simply the recipient of the money raised. In that case, the "hook" would be economics and how alcohol-free employees are needed to work in all those new businesses.

Week 4

Draw up a chart of the room arrangement and who is sitting at each table. This can be done on a large poster with each person's name on a post-it-note so you can move them easily. Be sure to allow room for people who show up at the last minute.

Buy a classy guest book and have a calligrapher put in the event, the honoree, your group's name, and the date. Position it in the reception area and assign a volunteer to have everyone sign their names and business. It will be sent to the honoree after the event or, if someone can photocopy it while the meal is going on, present it after the meal. You should keep a copy of the names for your own records. Be sure a few of your volunteers sign the book ahead of time so others know what is expected.

Week 2

At a minimum, the program should contain the following:

- o information about your cause
- o background on the honoree and why he/she is being honored
- o background on the host
- o the event's agenda
- o ads purchased by businesses, unions, trade associations, lobbyists, and others

Set a deadline for ads to allow enough time for the program to be designed and printed. It is a good idea to set the deadline a few days early so you can accommodate those people who always seem to be late. You do not want to turn anyone away if you can help it.

The agenda for this event should not be extensive. It is a lunch in the middle of a working day and you should not plan on it taking all day. The host can make a few welcoming remarks before the meal. Afterwards, the host introduces the corporate sponsors and welcomes everyone at the head table. The host then should introduce the chairperson of your organization's board of directors to talk a short while about your cause. The host then presents the award to the honoree and introduces him/her. The honoree accepts the award in a short speech. The host wraps it up with remarks thanking everyone for coming. Be sure to begin and end on time.

Use name tags. It is helpful for the honoree who does not know everyone by sight. On each tag, put their name and company affiliation and, unobtrusively, their table number. If someone will hand letter them clearly, do that. Otherwise you should have them typed so they are legible.

Make signs for every corporate table.

1 Day Before

Checklist:

- o match-up list of attendees with name tags and seating arrangements
- o call host's office for last minute additions and deletions
- o remind people who is sitting at the head table
- o prepare the program for the emcee
- o check with everyone who is speaking
- o check on the microphone
- o call florist to confirm the number of arrangements and when they will deliver (they should be done one hour before the event starts)
- o call the banquet manager and/or caterer to finalize numbers
- o assign a volunteer to each door where people could enter the building so they can be directed to the right room (volunteers should be there one-half hour before the time on the invitation)
- o ascertain if there a phone near the room that you can use; get the number
- o check on the guest book and if it is inscribed
- o learn if the table signs are done

- o ascertain who the "chauffeur" is for the honoree (if needed --airport to hotel, hotel to lunch location and back to airport)
- o be sure there is a table in the reception area for name tags and the guest book
- o check if there is a copy machine you can use
- o if the speakers want a lectern, there is one available
- o the caterer/banquet manager can provide coffee one hour before the event for your volunteers

Event Day

Go to the site as early as is practical, but leave someone in your office to field calls and refer them to you.

Checklist:

- o check the table arrangement against your chart and make changes if needed
- o place name tags and the guest book in the reception area (with a pen)
- o call florist if necessary
- o call caterer if necessary
- o be sure the tables are set correctly
- o the flowers and other decorations are as ordered
- o the microphone works
- o position your "greeters" at doors and near the guest book
- o you have the award for the honoree
- o set programs at each place
- o set place cards at the head table
- o position the lectern
- o bring with you pens, paper, straight pins, safety pins, aspirin, and anything else you may need

1 Week After

Thank everyone involved in an appropriate way. The underwriters should get letters from your board president and the event's host--or phone calls. The host and committee members should be thanked by letter or phone by your board president. Be sure to send a report on the event's success to the honoree. If any of his/her staff were particularly helpful, send them a letter as well.

2 Weeks After

Sit down in a final meeting with the steering committee and evaluate how well you did. Provide them with a financial report of all expenses and income from each source and show them the bottom line of net income.

Make a list of their suggestions for improving the event next time and start making plans.

RESOURCES

There are many good written materials available on all the topics covered in this manual: board development, marketing, public relations, special events, direct mail, etc. The business section of your public library or the library of a college which offers a business major has books and magazines that you will find useful. Take advantage of all the information from the business world. Many techniques and practices that work in the profit making world of business will have the same effect on the effective management of your group.

NEWSPAPERS

Be sure to read the business and lifestyle sections of your community's newspapers. These sections increase your familiarity with the names of people who are active in the business and philanthropic areas. Stories about new businesses that are coming to town or current ones that are expanding their operations are good leads when you are researching who to ask for a gift. The company that is moving out of town or closing its doors could be a good candidate to donate used office equipment.

The lifestyle section of the newspaper will tell you the names of people who are currently active with nonprofits. It is an old truism that if you want something done, you should ask a busy person. That is as true in fundraising as in any other endeavor. If the "busy person" is indeed too busy, he or she can always say "no" to your request but may be able to recommend someone else.

The Wall Street Journal and the New York Times are good sources of information about people and companies on the national level. The fortunes of a corporation's local division generally rise and fall with the parent company's success.

PROFESSIONAL ORGANIZATIONS

Professional organizations such as the National Society of Fund Raising Executives (NSFRE) or the Public Relations Society of America (PRSA) have local chapters in many cities. Although they are membership organizations, their meetings are typically open to non-members as well. A meeting generally includes a speaker on a topic of professional interest as well as an opportunity to mingle with others involved in the profession. Notices of their meetings can often be found in the business section of the local newspaper. Once you get on their mailing list, you will receive regular announcements of all upcoming events.

Some chapters are more active than others, but many sponsor day long or multi-day workshops and seminars each year. Both NSFRE and PRSA also convene annual national conventions. All of these opportunities can expose you to new ideas or techniques that you can implement in your own group. The personal contacts that you make can be very helpful as well. To find the address and phone number of the nearest chapter, contact the national office listed in the "Other Resources" section of this chapter.

Their workshops and seminars generally have a fee that may be beyond the budget of your organization. Some NSFRE chapters have scholarship funds for just this situation. Talk to one of the officers of your local chapter to see if such aid is available.

UNITED WAY OF AMERICA

United Way of America has a variety of national programs that connect volunteers with nonprofit groups whether or not they are UWA member agencies. Their Voluntary Action Centers (VAC) serve as clearinghouses for people interested in all kinds of volunteerism from program delivery to organization management. VAC's often maintain a board bank where people interested in board membership can be matched with groups in need of new members with special interests and talents.

Another United Way program offered in over 150 communities is the Management Assistance Program (MAP). This program recruits volunteers from businesses, the professions, and educational institutions to serve as management consultants to nonprofit groups. The goal of these assignments is to enable the group to become better-managed and more self-reliant because of the skills they have learned. These volunteers share their professional expertise in such areas as accounting, finance, budgeting, personnel, organizational management, marketing, and goal setting. A by-product of this arrangement is often a long-term relationship between the volunteer consultant and the nonprofit group.

Some United Ways offer the Volunteer Leadership Development Program to enhance the leadership skills of volunteer board members. The local volunteer trainers in 100 communities use materials developed by the national United Way of America on topics such board/staff relations, financial management, resource development, planning, and managing change.

A fourth United Way program is called MANAGE (Managing A Not-For-Profit Agency: Guidelines for Excellence). It offers a comprehensive approach to the training of the staff members of nonprofit groups at the upper levels of management.

Contact your local United Way office for information about the volunteer programs available in your area. There may be modest fees involved to cover the cost of duplicating materials and other program expenses.

SCORE

The Small Business Association administers the Service Corps of Retired Executives (SCORE) nationwide. Their volunteers are available free of cost to nonprofit groups as well as to small businesses. They offer assistance in the same areas as does the MAP program of United Way of America, but all of SCORE's volunteers are retired.

Your community may have other volunteer groups set up as well. Contact the Chamber of Commerce, the Mayor's office, your representative on the City Council, the National Society of Fund Raising Executives, or anyone else who knows your community well and knows how to tap all of its resources. Be creative, flexible, and tenacious and you will find the help you need.

BOOKS

1. Accent on Recognition (Philanthropic Service for Institutions, Adventist World Headquarters, 6840 Eastern Avenue, N.W., Washington, DC 20012, 202-722-6132). This book is full of information about appropriate recognition for donations of time, talent, and money. It is well illustrated with actual items used by other groups. (It is being revised in 1988 and should be available again before the end of the year.) FREE single copies and bulk rates are available for larger orders.

2. Discover Total Resources: A Guide for Nonprofits (The Mellon Bank, Community Affairs Division, One Mellon Bank Center, Pittsburgh, PA 15258, 412-234-6266). This easy to read book provides a guide for your board, staff, and volunteers to assess how well you are tapping the full range of your community resources: people, money, goods, and services. FREE

3. 500 Ways For Small Charities To Raise Money by Phillip T. Drotning. (Contemporary Books, Inc., 180 North Michigan Avenue, Chicago, IL 60601). This is a good idea book that contains some excellent planning information too. It was originally published as Putting The Fun In Fund Raising.

4. The Fundraising Formula by Katie Kraatz and Julie Haynes. (The Fundraising Formula, 4125 Via Nevel, Palos Verdes Estates, CA 90275, 1-800-523-2106). This is a "special" special events source book full of 50 novel events, presented in outline form and ready for you to adapt to your situation. These are actual events that have been produced at least once. The profits range from $4,000 to $800,000.

5. Fund Raising: The Guide to Raising Money From Private Sources by Thomas E. Broce. (University of Oklahoma Press, Norman, OK 73019). A clearly articulated approach to fundraising covering all the techniques and emphasizing the roles of volunteers and planning. (This book is also available from The National Society of Fund Raising Executives, 703-684-0410).

6. Fund Raising Letters by Jerald E. Huntsinger. (Emerson Publishers, Richmond, VA). A comprehensive guide to raising money by direct response marketing. It covers basic letters, creativity, the package, special letters, multi-media fundraising, marketing, strategy and the creative management of direct mail programs. (This book is most easily available from The National Society of Fund Raising Executives, 703-684-0410).

7. The Grassroots Fund Raising Book by Joan Flanagan. (Contemporary Books, Inc., 180 North Michigan Avenue, Chicago, IL 60601). Now in its second edition, this book covers a variety of special events in some detail. It contains new chapters on raising money from memberships, from believers in your cause, and from the general public.

8. Guidelines for Proposal Presentation (The Southern California Center for Nonprofit Management and the Southern California Gas Company. Contact the Contributions Administrator at Southern California Gas Company, 720 West Eighth Street, Los Angeles, CA 90017, 213-689-2149.) This eleven page booklet offers grantseekers a brief guide on the content, rationale and procedures for soliciting funds from corporations and private foundations. FREE

9. Mega Gifts: Who Gives Them, Who Gets Them by Jerold Panas. (Pluribus Press, Inc., a Division of Teach'em, Inc., 160 East Illinois Street, Chicago, IL 60611). This book is about the people who give the very big gifts but many of the author's "discoveries" apply to all donors. (This book is also available from the National Society of Fund Raising Executives, 703-684-0410).

10. Money Makers: A Systematic Approach to Special Events Fund Raising by Charles E. Alberti, Ph.D.; George S. Macko, MHA; and Nike B. Whitcomb CFRE. (Nike B. Whitcomb Associates, 43 West Hubbard Street, Chicago, IL 60610, 312-822-9017). In 13 chapters the authors offer a nuts and bolts approach to many special events. They cover job descriptions for volunteers, publicity plans, sample letters, budgets and much more.

11. Philanthropy and Marketing by James Gregory Lord. (Third Sector Press, 2304 Edgerton Road, Cleveland, OH 44118). The author applies effective business management techniques to the nonprofit sector. (This book is also available from The National Society of Fund Raising Executives, 703-684-0410).

12. Professionals' Guide to Publicity. (Available from Hudson's, Box 311, 44 West Market Street, Rhinebeck, NY 12572, 914-876-2081). This is a fairly basic "how to" guide about publicizing your group, cause or event.

13. Woman's Day Book of Fund Raising by Perri and Harvey Ardman. (St. Martin's Press, Inc., 175 Fifth Avenue, New York, NY 10010). The authors tapped both volunteers and professional fundraisers to compile this book full of useful advice about the art and science of raising money.

PERIODICALS

1. "Case Currents" is published by the Council for Advancement and Support of Education. Its main audience is educational institutions but many articles apply to the management and marketing of a broader range of philanthropic groups. (Suite 530, One Dupont Circle, Washington, DC 20036).

2. "Foundation News" (The Council on Foundations, P.O. Box 6811, Piscataway, NJ 08855-6811). Published each month, this provides reports on foundation activities including lists of grants by source in each issue.

3. "Fund Raising Management" (Hoke Communications, Inc., 224 Seventh Street, Garden City, NY 11530-5771). This monthly magazine has articles and columns on every topic of interest to fundraisers. It also has an abundance of ads for the development program.

OTHER RESOURCES

1. The Conference Board, Inc. publishes the Annual Survey of Corporate Contributions. (845 Third Avenue, New York, NY 10020, 212-759-0900).

2. The Federal Register is published daily every weekday except holidays. It contains all the federal funding regulations, proposed and final. For subscription information contact the Superintendent of Documents, US Government Printing Office, Washington, DC 20402. The Register can also be found in many public libraries, Federal office buildings, colleges and universities, large social service organizations, and state or regional ACTION offices.

   The Foundation Center makes available detailed information about foundations at its national centers as well as in host libraries across the county. Using its resources, you can identify foundation programs which correspond with your needs. Call 1-800-424-9836 for the nearest host library or write to 79 Fifth Avenue, New York, NY 10003.

   Foundation Center directories include:
   The Foundation Directory provides information on over 5,000 U.S. Foundations with assets of $1 million plus, or with at least $100,000 in annual grants. Data includes financial figures, personnel, purpose and activities, types of support and application procedures.

The National Data Bank has information on over 25,000 foundations arranged by state. The data includes who to contact and where they are, the foundation's assets, total grants paid in a year, total gifts received by the foundation, who publishes annual reports, and the IRS identification number.

Comsearch Healthcare Grants Guides are targeted to specific healthcare areas. Each guide includes the number of grants, total amounts donated, the recipients, the purpose of the grant, and the amount of each by foundation.

3. The Grantsmanship Center (1031 South Grand Avenue, Los Angeles, CA 90015, 213-689-9222). The Center offers publications and classes that cover a variety of nonprofit management areas but emphasize grantsmanship. Classes are scheduled in various cities throughout the year. Contact them for a catalog.

4. Independent Sector is a coalition of over 650 corporate, foundation and national voluntary organization members. The IS mission is to create a national forum capable of encouraging the giving, volunteering and not-for-profit initiatives that help us better serve people, communities and causes. IS is a membership organization but offers its many publications to non-members as well. (1828 L Street, N.W., Washington, DC 20036, 202-223-8100). Contact them for a catalog.

5. The National Society of Fund Raising Executives is the professional membership organization for fund raisers involved in every kind of philanthropic group. There are local chapters in every state and many cities whose meetings and workshops are open to non-members. NSFRE also has a computerized information library on fundraising topics. Contact NSFRE for more information at 1101 King Street, Suite 3000, Alexandria, VA 22314, 703-684-0410.

6. Planned Giving materials can be obtained from several national firms. A good place to start is Robert F. Sharpe's Planned Giving Idea Book (Thomas Nelson Publishers, Nashville, TN 37202). Sharpe and others offer training courses nationwide as well.

7. The Public Management Institute also publishes a variety of fundraising guides. (358 Brannan Street, San Francisco, CA 94107, 415-896-1900). Contact them for a catalog.

8. The Public Relations Society of America (PRSA). Contact the Professional Services Department at the National Office for information on the chapter nearest to you. (33 Irving Place, New York, New York 10003, 212-995-2230).

9. Service Corps of Retired Executives (SCORE) volunteers offer management help to nonprofit groups in over 700 cities nationwide. Their number is listed in the government section of your telephone book under the Small Business Administration. You can contact the national office at 1129 20th Street, N.W., Washington, DC 20036, 1-800-368-5855. FREE.

10. Standards for Charitable Solicitations (Council of Better Business Bureaus, Inc., 1515 Wilson Blvd., Arlington, VA 22290, 703-276-0100). The BBB publishes 22 standards to promote ethical practices by philanthropic organizations. FREE, but please enclose a self-addressed stamped envelope with your request.

11. The Taft Group offers a range of printed materials including books, monthly newsletters on corporate and foundation philanthropy, and compendiums of data on those who give money to charity. (5130 MacArthur Blvd., N.W., Washington, DC 20016, 1-800-345-2228). Contact them for a catalog.

12. The United Way of America offers several volunteerism programs nationwide. Contact your local United Way to find out what is available in your area or contact the Community Resources Division of the National Office at 703-836-7100. Their address is 701 N. Fairfax Street, Alexandria, VA 22314-2088.

13. Vocational schools or commercial business schools sometimes place students in unpaid internships in nonprofit organizations. This can be very helpful if you have a large amount of data entry work to be done on a computer. Contact your local schools to see what is available in your area.