

*Spring 2003*

**Get to work finding volunteers.** Employed Americans are more likely to volunteer than those who do not work or are unemployed. More women than men volunteer. And those ages 35 to 54 volunteer more than seniors or those in their early 20s.

59 million Americans volunteer each year – 27.6% of the civilian population over age 16. They put in an average of 52 volunteer hours annually, and are most likely to volunteer for religious, educational, and youth-service groups.

For more information, see the federal Bureau of Labor Statistics report, “Volunteering in the United States,” available for free download at <http://www.bls.gov/news.release/volun.nr0.htm>

[Source: “Study Says 59 Million Did Volunteer Work,” The Associated Press, December 30, 2002.]

**Every successful organization needs “enablers.”** Who are enablers? They are people who respect and trust others, and are trustworthy themselves. They welcome divergent opinions, and are flexible and comfortable with change.

Enablers are proficient teachers and learners. They communicate effectively, think critically, and know how to strategize. They are effective motivators, and manage people well.

# A FUND RAISER'S NEWSY LETTER

A FREE periodic bulletin featuring fundraising, management, and board information.

Visit the Newsletter on the World Wide Web! The address:

<http://www.jointogether.org/sa/resources/funding/news>

The Newsletter is also available online at

<http://www.lib.msu.edu/Harris23/grants/newsy.htm>

What value do enablers bring to your organization? They get volunteers to help get the work done! Enablers transmit your values, engage volunteers, provide them with direction, and clarify expectations for volunteers and staff. Enablers engage volunteers in process as well as tasks, and ensure quality decision-making.

To identify enablers in your organization and teach your staff to be enablers, see *Strategic Fund Development: Building Profitable Relationships That Last* by Simone P. Joyaux, ACFRE, published by Jones and Bartlett Publishers: [www.jbpubs.com](http://www.jbpubs.com) or [www.amazon.com](http://www.amazon.com).

### **Count quality, not quantity.**

More not-for-profits than ever are evaluating their programs – 85% of secular groups and 72% of religious organizations. But too many still focus on the number of services they provide, rather than how good they are.

65% of religious charities and 76% of non-religious groups track the changes their programs make in clients lives. But many need to improve their computer technology to collect and analyze data, and involve staff in determining what information should be looked at to measure effectiveness.

For more information, see “Balancing the Scales: Measuring the Roles and Contributions of Nonprofit Organizations and Religious Congregations,” published by Independent Sector. Highlights are available on the group’s website:

[www.independentsector.org](http://www.independentsector.org); the full version of the report is \$28 for members and \$38 for nonmembers, and can be ordered by calling 888-860-8118.

Also, the Urban Institute has published “Making Use of Outcome Information for Improving Services: Recommendations for Nonprofit Organizations.” The

**...FROM JOYAUX ASSOCIATES.**

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report is available free online at [www.urban.org](http://www.urban.org) or for \$5 by calling 877-847-7377.

[Source: "Most Charities and Religious Groups Evaluate Programs, Report Says," Ian Wilhelm, *The Chronicle of Philanthropy*, October 31, 2002. P.O. Box 1989, Marion, OH 43305; 800-728-2819.]

**Have you adopted a code of ethics?** With public faith in not-for-profits faltering, it's more important than ever to ensure that your board and staff act ethically at all times. You need to adopt an organizational code of ethical practices, conduct an annual ethics audit, abide by ethical standards, and involve constituents in the ethics process.

P.S. Make sure that your organization adopts a code of ethics for fund development also. Check out the "AFP Code of Ethics and Standards of Professional Practice" at [www.afpnet.org](http://www.afpnet.org).

"Obedience to the Unenforceable: Ethics and the Nation's Voluntary and Philanthropic Community," published by Independent Sector, includes sample language for an organizational code of ethics and tools for solving ethical dilemmas.

The document can be viewed free online at <http://www.independentsector.org/issues/accountability.html>; print copies are \$10 for members and \$15 for nonmembers and can be ordered by calling 888-860-8118.

[Source: Independent Sector press release, November 11, 2002.]

**Should your group have an advisory board?** The answer may be "yes" if your board of directors is built around fundraising. Such boards may be disconnected from the populations you serve, making a community advisory board critical.

For groups that legally cannot have a board of directors (such as those sponsored by a larger organization), an advisory board can perform many of the functions of a board of directors.

And large organizations can benefit from having an advisory board that focuses on a single facet of their overall mission, or enhances community connections.

If you establish an advisory board:

- Draft a written description of the responsibilities, activities, and limitations of the board. Include job descriptions, meeting schedules, term limits, and rules for appointing a chairperson.
- Establish a formal relationship between the advisory board and the board of directors, detailing their respective responsibilities.
- Ensure that membership on the advisory board is meaningful and rewarding, not just "for show."
- Consider asking a community leader to chair the advisory board and act as a spokesperson for your group within the community.

[Source: "What is an Advisory Board, and Should We Have One?" Board Cafe, October 2002. [http://www.boardcafe.org/bc2002\\_10.html](http://www.boardcafe.org/bc2002_10.html)]

**Bang the gavel on a successful auction.** Charity auctions can be successful fundraisers: more than 100,000 are held annually.

To ensure that your auction goes smoothly:

- Plan early — up to a year ahead to secure a venue, recruit volunteers, procure auction items, and publicize your event. Advance planning will help you determine how much you need to raise to make your auction pay off.
- Line up a volunteer committee to oversee tasks like procurement, running the silent and live auctions, setup and decor, entertainment, invitations, publicity, registration, item pickup, and cleanup. On the night of the auction, plan to have at least one volunteer for every 10 guests.
- Seek attention-grabbing auction items. Match goods to the demographics and interests of your supporters. Find items, experiences, and activities that are not easily purchased. To find auction items, encourage volunteer networking and outreach to local restaurants, hotels, etc.
- Use event-management software to simplify logistics.
- Publicize your event well in advance. Send a "save-the-date" card to supporters six months in advance. Invitations should go out six to eight weeks before the auction. Advertise in media that target your key audience.
- Thank your volunteers and staff when it's all over.

[Source: "Auction Basics to Ensure a Successful Charity Event," Michael Holman, PNN Online, January 28, 2003. Philanthropy News Network: [www.pnnonline.org](http://www.pnnonline.org)]

**Are you responding to new demands for accountability?**

Donor confidence is down. Scrutiny is up. And not-for-profits are expected to be more efficient and open about their finances than ever.

Today's donors demand more than feel-good stories. They want to know how many people you help, and what the outcomes of your work are.

Fallout from controversy over Sept. 11 donations hurt all charities. To rebuild public confidence, not-for-profits must:

- do a better job of explaining your work to the public
- be ready to defend yourself when controversy hits
- better measure the impact of your work
- address poor performance wherever it exists

For more information, see the report, "Trust in Charitable Organizations," available online from the Brookings Center for Public Service: <http://www.brook.edu/comm/reformwatch/rw06.htm>

[Source: "Charities Face More Pressure to Be Accountable," Mark O'Keefe, San Francisco Chronicle, Jan. 29, 2003.]

**Layoffs and firing employees is a sad fact of work life.** And so is fear of retaliation.

To protect your organization:

- Act quickly to avoid rumors

and deny employees time to plot retaliation.

- Notify security after employees have worked their last shift, but before they return to work to receive news of their termination.
- Don't let employees back into their former work area. Have security bring their belongings to a private waiting room for retrieval.
- Deactivate the employee's access codes or passwords for company intranets, client and donor lists, e-mail, human-resources information, in-house communication, and libraries.
- Retrieve employee's ID cards, and equipment like cell phones and laptop computers, at time of termination interview.
- Keep termination interviews private and compassionate.

[Source: Kahn, Litwin, Renza & Co., Ltd., CPAs and Business Consultants; [www.kahnlitwin.com](http://www.kahnlitwin.com)]

**Don't get "clipped" by negative press coverage.** Hire a clipping service to keep you up-to-date on what the media is saying about your organization. Rates range from \$40 to \$280 per month; clips are sent to you twice a week.

Major clipping services include Bacon's Clipping Bureau: 800-621-0561; Burrelle's: 800-631-1160; Luce Press Clippings: 800-628-0376; and the New England Newsclip Agency: 508-879-4460.

[Source: Kahn, Litwin, Renza & Co., Ltd., CPAs and Business Consultants; [www.kahnlitwin.com](http://www.kahnlitwin.com)]

**Tap into donors' sense of obligation: 60% of donors say they give because they feel that they owe something to the community.** 86% of givers believe they have the power to improve the welfare of others, compared to just 73% of non-givers.

Who mines this vein of commitment best? Religious groups, which receive support from 69% of households. 43% of households give to healthcare organizations, 39% give to human-services groups, and 38% support youth services.

For more information, see the report, "Giving and Volunteering in the United States," available from Independent Sector at <http://www.independentsector.org/programs/research/gv01main.html> [Source: Independent Sector press release, October 28, 2002.]

**Considering taking a loan from a board member?** Be sure to:

- Have your lawyer draft legal documents for the loan.
- Get approval from your board (excluding those making the loan, who should recuse themselves from the vote).
- Inform lenders that if your group goes bankrupt or gets liquidated, as "insiders" they could be last in line for repayment.

Caution: Consider carefully before accepting a loan from a board member. Those who give may feel that they should have more "say" in the group because their money is involved. And non-lenders may defer to lenders.

Loans from board members

can be risky. They should only be considered in the event of an emergency, such as a temporary cash shortage. Such loans should be repaid as quickly as possible.

[Source: "Loans from Board Members," Board Cafe, January 2003. [http://www.boardcafe.org/bc2003\\_01.htm](http://www.boardcafe.org/bc2003_01.htm)]

**Raising money online?** Share your successes and failures with the National Survey on ePhilanthropy.

Giving USA, the American Association of fundraising Counsel Trust, and the ePhilanthropy Foundation are conducting the survey. To take part, log onto <http://www.ephilanthropyfoundation.org>  
[Source: eTapestry, January 2003; [www.etapestry.com](http://www.etapestry.com).]

**Charities need to cope with the changing face of philanthropy.** The donor population is at an all-time low – down to 69% of

adults. Worse, donor confidence is also at an all-time low. Job #1 for not-for-profits: restoring public confidence.

The U.S. population is growing. But the country is getting less White, and more Black, Hispanic, and Asian. That poses challenges for fundraisers: per-capita giving among these ethnic groups currently is lower than traditional White populations. Charities must carefully tailor their marketing and communications to meet the needs of diverse audiences. Cultural relevance is critical.

For more information, see "The 21st Century Donor: Emerging Trends in a Changing Market," available free from the customer-relationship marketing firm Epsilon, Inc.: [http://www.epsilon.com/rnhome.nsf/articles\\_C!OpenForm](http://www.epsilon.com/rnhome.nsf/articles_C!OpenForm)  
[Source: The Chronicle of Philanthropy, November 14, 2002. P.O. Box 1989, Marion, OH 43305; 800-728-2819.]

## Internet ...

If you're raising money for women's programs, check out the website for the Women's Fund of Rhode Island. The site includes information on issues affecting women and girls, proposal-writing tips, and data on women and giving. <http://www.rifoundation.org/wfri/html/index.htm>  
See also the Women's Funding Network website at <http://www.wfnet.org>

Consulting firm Bentz Whaley Flessner offers a wealth of annual-giving tips on its website, including appeal letters, phone scripts, and surveys. [http://www.bwf.com/resources/sharedResrcs\\_service.cfm](http://www.bwf.com/resources/sharedResrcs_service.cfm)



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**Strategic Fund Development: Building Profitable Relationships That Last** • by Simone P. Joyaux, ACFRE

You'll learn how to ensure a healthy organization...how to create a powerful strategic plan...how to build a strong and profitable fundraising program...how to get volunteers to do what you want...it's all here, in the second edition of Simone Joyaux's popular and inspiring book. Included in this expanded edition: examples and case studies from organizations of all types and sizes.

*Simone P. Joyaux, ACFRE, is recognized internationally as a leading consultant to nonprofits and a dynamic speaker and teacher. Joyaux is the founder of the Women's Fund of Rhode Island. She has been an officer of the Association of Fundraising Professionals (formerly NSFRE) and chair of CFRE International. She is a faculty member for the Master of Arts Program in Philanthropy and Development at St. Mary's University of Minnesota.*

**...FROM JOYAUX ASSOCIATES.**

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# May we help you?

Build a focused and productive board?

Re-engineer, re-mission, re-purpose your organization?

Crash test the feasibility of a capital campaign?

Raise more money through the mail? Establish an endowment?

Increase planned giving? Woo hearts and minds using public relations? Build your organization's image and reputation locally, regionally, nationally?

Attract new donors? Increase the average gift? Upgrade from an annual appeal to a multi-ask, year-round solicitation program? Make your events irresistible to corporate sponsors and crowds? Get the press to notice your existence? Professionalize your fund raising or marketing staff?

## Expert help is just a phone-call away.

Joyaux Associates offers not-for-profits of any size expert assistance in many key areas such as **strategic planning, board development, and fund development**. Through its affiliated (and award-winning) marketing communications firm, Ahern to Bousquet, Joyaux delivers outstanding results in **direct mail creative and program planning, public relations, event planning and implementation, marketing, advertising, writing and design of printed materials (newsletters, brochures, etc.)**

## NEW: hands-on, personalized, professional training for you, your staff, or your board.

In just a few hours of intensive training, you'll learn the techniques and secrets that guarantee improved board and staff effectiveness, better donor relations, increased media coverage, and more dollars raised. We actually help you develop the product — whether it's a fund development plan, board orientation, evaluation tools...whatever.

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## Who we are...

- Simone P. Joyaux, ACFRE, is one of the country's top-ranked fund-raising professionals. She has 23 years experience working with not-for-profits of every size and stripe. Now celebrating its 10th year, Joyaux Associates has helped hundreds of clients. In 1997, Aspen published her book *Strategic Fund Development: Building Profitable Relationships that Last*. An inspiring presenter, she travels frequently to speak about fund development, planning, and organizational development.
- In 1998, the IABC, the world's largest association of professional communicators, honored Ahern to Bousquet, Inc., with its top international award for not-for-profit media relations: the Gold Quill of Excellence, recognizing the firm's extraordinarily successful work promoting Roger Williams Park Zoo. A2B's fund-raising clients have included the Lifespan hospitals, Bryant College, the National Association of EMTs, Children's Aid & Family Services (NJ), etc. Principals are Lisa Bousquet, APR, and Tom Ahern, ABC.

## You can request more information and samples from Joyaux Associates by contacting us at...

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