

Winter 2004

Visit Simone — and the Newsletter — online! Joyaux Associates' new website includes resources on philanthropy and fundraising, information on training and workshops, details on the firm's services and capabilities, and, of course, back issues of the Newsletter.

Check it out at
www.simonejoyaux.com.

Also, for tips on improving your communications, see the website of Ahern Communications Ink: www.aherncomm.com

Adhere to Simone's basic principles of fund development:

- Most people give because they are asked. It's that simple. But only ask those who care about your cause.
- It's not what you're selling, it's what I'm buying that counts. Match the donor's interests, motivations, and aspirations and they will give to you.
- Don't universalize your own passion. Not everyone is interested in your cause, no matter how convincing you are. Find those who share your passion.
- Don't trespass on personal and professional relationships. Ask your volunteers to use their connections to identify those who are predisposed to support your cause and build relationships with them.
- You — the board member, development officer, CEO,

A FUND RAISER'S NEWSY LETTER

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

To subscribe, visit Simone's Web site at
www.simonejoyaux.com
Lots of information & resources.

- fundraising volunteer — have to give first. Belief in your cause is demonstrated by giving money, not just time.
- Most fund-development problems are actually organizational-development problems (board recruitment, program quality, communications, etc.). Fix them!
 - The mission of fund development is to secure donors, not donations. It's about loyalty and commitment.
 - Fund development is a process

and a profession. The process includes planning, marketing, managing, budgeting, cultivating, soliciting, and more. The profession is founded on ethical principles and standards, incorporates a documented body of knowledge demonstrated through best practices, and protects the public through a certification process.

- Volunteers are essential for fund development. When enabled by professional experts, they are ideally suited for identifying, cultivating, and soliciting donors.
- A balanced mix of solicitation strategies and funding sources ensures stability and credibility.
- The best way to secure a contribution is a face-to-face request by the right person at the right time for the right project, and for the right amount.
- Donors have rights, and you are responsible for ensuring that they are upheld. Adopt and adhere to the *Donors Bill of Rights*.

[Source: *Basic Principles of Fund Development*, Simone P. Joyaux. For more information, see www.simonejoyaux.com]

- Gag office gossip.** Gossip saps employee morale and productivity. To mute watercooler chatter:
- Keep employees well-informed. Effective communication about promotions and other changes can prevent speculation.
 - Build a supportive workplace culture. The worst gossip often occurs in overly competitive environments.
 - Establish and enforce a policy against malicious personal gossip.
 - Deal with rumors immediately.

from Joyaux Associates. www.simonejoyaux.com

- Confront chronic gossips. Use one-on-one meetings or the “communication” section of employee evaluations to deliver the message that office gossip is unacceptable.

[Source: “Loose Lips, Pink Slips,” Samuel Greengard, *Arrive* magazine, November/December 2003. McMurtry Publications, 1120 Avenue of the Americas, 4th Floor, New York, NY 10036.]

Help companies get rid of old computers. Many firms upgrade their computer equipment regularly. But disposal of older computers — even those just a few years old — can be a hassle. Companies don’t want to landfill the equipment. But they also want to ensure that donations go to worthy recipients.

By acting as an “outsourcing” agent for disposing of old computers, nonprofits can get still-valuable equipment for their programs or clients as well as providing a valuable service for local companies. Moreover, donating computers to charity earns companies a tax deduction.

Individual charities can ask companies to donate computers. Or, you can link up with organizations like the National Cristina Foundation (www.cristina.org) or the Computer Recycling Center (www.crc.org), which gather donated computers from companies, refurbish them, and distribute the equipment to nonprofits, schools, and community groups.

[Source: “Good’ Riddance to Used Computer Equipment,” Divya Manning, *Inside Corporate Philanthropy*, September 5, 2003. www.onphilanthropy.com]

Americans are drowning in choices. Supermarkets now carry 30,000 items, up from 5,000 in the 1950s. We’re bombarded with up to 5,000 ads a day, compared to about 500 in the 1970s.

More charities also compete for consumers’ attention: In 1960, there were 25,000 nonprofits in the U.S. Today: more than 2 million. The number of nonprofits has increased 12% in just the past three years.

To fight through the clutter:

- Find new ways of acquiring donors, such as e-mail, the Internet, and alternate response media (ARM).
- Spice up your fundraising appeals through storytelling, localize your campaigns, and seeking matching gifts.

[Source: “Do Donors Have Too Many Choices,” Kelly Cummings, *Today’s Fundraiser*, September 5, 2003. www.onphilanthropy.com]

Good database management is good stewardship. Managing your donor lists keeps communication flowing, decreases unwanted mail, and cuts costs.

To keep your database healthy, involve your database manager and staff in your fundraising mission by:

- Stressing the importance of accurate data entry. Nothing alienates a donor more than getting a letter with their name misspelled.
- Educate database staff on basic fundraising so they understand the importance of what they do.
- Ensure that list-related donor

complaints are shared with the development director. Develop a consistent response strategy for common complaints, such as supporters who want less or no mail.

- Update donor contact information via an NCOA (National Change of Address) query at least once a year.

[Source: “Caring for Your Donor File is Caring for Your Donors,” Randy Brewer, *Today’s Fundraiser*, September 5, 2003. www.onphilanthropy.com]

Are you reaching out to older Americans and ethnic communities to recruit volunteers? 90 percent of African-Americans over age 45 volunteer, a far higher percentage than among white Americans. And Hispanic volunteers give the most hours — an average of 22 hours a month. Yet Latinos and African-Americans are asked less frequently than whites to volunteer or donate money.

Overall, 86% of Americans over age 45 volunteer. 30% say the 9/11 terrorist attacks made them more willing to give their time.

Working seniors could become the most generous donors over the next decade. Many baby boomers, now turning 50, are college grads, volunteered in their youth, and grew up in homes where parents volunteered. And in the next 10 years, the over-50 population will increase by 18.3 million people.

For more information, see the American Association of Retired People (AARP)’s

"Multicultural Study 2003: Time and Money: An In-Depth Look at 45-Plus Volunteers and Donors"; the executive summary can be downloaded free at http://research.aarp.org/general/multic_2003_1.pdf

Also, see "Experience at Work: Volunteering and Giving Among Americans 50 and Older," a study by AARP and Independent Sector, available online at <http://www.independentsector.org/programs/research/experience.html>

[Source: AARP press release, September 14, 2003; and Independent Sector press release, November 4, 2003.]

Target smaller donations. 86% of Americans are still donating to charity. But they're giving smaller gifts.

In 2003, 14% of donors gave gifts of \$500 or more. That's down from 24% in 2001.

For more information, see the report, "Vertis Customer Focus 2003: Direct Marketing for the Nonprofit Sector," available free from Scott Marden, Director of Market Research, Vertis, 250 West Pratt St., Baltimore, MD 21201; 978-388-2492.

[Source: "Donors are Giving Less Than in 2001, Poll Finds," Matt Murray, *The Chronicle of Philanthropy*, October 16, 2003. P.O. Box 1989, Marion, OH 43305; 800-728-2819.]

Check your mailing list to determine which of your donors would like to receive information via e-mail. Then start an electronic newsletter to cultivate and nurture donors.

An e-newsletter can keep you in regular contact with supporters. It provides a forum to promote your purpose and services. It gives you a platform to demonstrate your successes and provide important and interesting information. And when archived online, the newsletter can be a valuable resource for members or donors.

E-newsletters are cheaper, faster, and more environmentally friendly than paper publications. They also can be tracked more efficiently, so you'll know if they have been received by the recipient, which articles were read, and what links were clicked on. This information can be used to better tailor your publications and appeals to match the interests of your supporters.

E-mailed publications also can include easy-to-use registration forms for upcoming events or training classes offered to supporters; interactive polls and surveys that can provide instant feedback on issues; and forms for updating contact information. And, of course, your e-newsletter always should include a call for donations, linked to an easy online mechanism for giving.

[Source: "A Good e-Newsletter Can Work Wonders for Your Nonprofit," Chris Donald, *Philanthropy News Network Online*, November 12, 2003. www.pnnonline.org]

Companies crave recognition when partnering with nonprofits. Recognition programs add credibility to corporate philanthropy, raise awareness of the issue supported, and

are plain old good public relations for the firm.

Recognition programs can include presenting an award to your corporate partner, issuing press releases promoting your relationship, and holding a joint press conference that positions the company as an expert on your issues. You can even feature the company's logo on your website and link to their corporate site.

Joint press releases should include a quote from a prominent company official, a brief description of the business, and a short explanation of the connection between the firm and the issue it is supporting. When companies make in-kind donations, mention the specific brand names of the products being donated.

Nonprofits may consider using the media and public-relations expertise and staff of their corporate partner to promote the relationship. But be sure to establish a clear understanding of each party's role in the recognition program. And remember: It is totally appropriate for your group to state up front what you will or will not do to promote your partner.

[Source: "Using Recognition to Build Corporate Partnerships," Connette Gayle, *Inside Corporate Philanthropy*, July 18, 2003. www.onphilanthropy.com.]

Board turnover is inevitable. Keep transitions smooth. Start by using a board-service form to gauge each new board candidate's commitment. Ask what issues interest the candidate the most, how much time they have to contribute, what they want to gain

from service, and what skills they bring to the job. The form should spell out the board member's expected annual time commitment, meeting attendance, and fundraising role.

The executive director should write a letter to each new board member welcoming them to the job and suggesting a visit or tour. Departing board members should be asked to attend a transitional interview with the new member.

Reinforce the importance of the board member's role by formally administering an oath of office. Give new board members a chance to mingle with their peers by setting up a dinner or some other informal event.

Finally, give the new board member meaningful work. And conduct a follow-up orientation after a few months to answer questions and address issues not tackled during the first interview.

[Source: "Make for a Smooth Changing of the Board Guard When Transition Occurs," *Board & Administrator for Administrators Only*, March 2003. Aspen Publishers, 7201 McKinney Circle, Frederick, MD 21704; 800-638-8437.]

Ensure that your board members understand their fiscal responsibilities. Nonprofit boards set financial policy for the organization. They determine how money will be spent. They help develop and approve the annual budget, but delegate implementation of fiscal policies to the chief financial officer.

Board members also are

responsible for monitoring financial outcomes to ensure that the organization is solvent, on target with planned expenses and revenues, and has income to meet future expenses.

To fulfill these responsibilities, board members should be provided with a basic financial statement, bottom-line figures on revenues and expenditures, and historical fiscal data for comparison.

[Source: "Understanding Your Financial Responsibility," *Board & Administrator for Board Members*, March 2003. Aspen Publishers, 7201 McKinney Circle, Frederick, MD 21704; 800-638-8437.]

Internet ...

Campbell Research recently surveyed nonprofit employees about their favorite fundraising software. Among the best-rated were:

- Donor2 from Systems Support Services: <http://www.donor2.com/>
- Raiser's Edge from Blackbaud: <http://www.blackbaud.com/solutions/raisersedge.asp>
- ResultsPlus from Metafile Information Systems: <http://rp.metafile.com/>
- Matchmaker 2000: <http://www.matchmaker2000.com/>
- eTapestry: <http://www.etapestry.com/>

[Source: "Charity Fund Raisers Rate Software in Online Survey," Nicole Wallace, *The Chronicle of Philanthropy*, February 2, 2003. P.O. Box 1989, Marion, OH 43305; 800-728-2819.]

Resources ...

"These are among the books and articles that have made the biggest difference in my life in philanthropy," says Simone:

- **Robin Hood Was Right: A Guide to Giving Your Money for Social Change** by Chuck Collins and Pam Rogers. New York: W.W. Norton & Company, 2000.
- **Built to Last** by James C. and Jerry I. Porras. New York: HarperCollins Publishers, 1994.
- **"The Living Company,"** by Arie De Geus. *Harvard Business Review*, March-April 1997.
- **"The Greatest Leadership Challenge: Renewing our Belief in Democracy and Political Advocacy,"** by Scott Harshbarger. *The Nonprofit Quarterly*, Summer 2003.
- **"The Commons: Our Mission If We Choose to Accept It,"** by Roger Lohmann. *The Nonprofit Quarterly*, Summer 2003.
- **"Who's Promoting the General Welfare?"** by Jeff Madrick. *The Nonprofit Quarterly*, Summer 2003
- **Clicks and Mortar** by David S. Pottruck and Terry Pearce. Jossey-Bass Publishers, Inc., San Francisco, 2000.
- **The Fifth Discipline: The Art and Practice of a Learning Organization** by Peter M. Senge. New York: Doubleday, 1990.