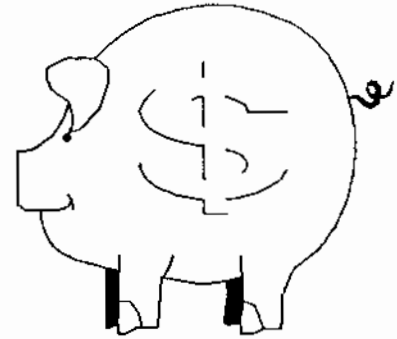

CAPITAL IDEAS

Fundraising Tips
for Local Leagues



A Publication of the
League of Women Voters of Texas

LWV-Texas
1212 Guadalupe, #107
Austin, Texas 78701
512/472-1100 FAX 512/472-4114

1993

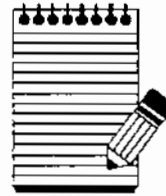
Why Leagues Need to Raise Money

Like recruiting and involving members, finding funds to support the League's mission is an ongoing, year-long job that demands work from the entire board and from many members. As leaders and members work to educate voters and to sway public policy, they may forget that funds are needed to carry out the tactics and projects planned. This booklet is planned to assist local League boards in fund raising efforts.

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GETTING STARTED: THE PLANNING STAGE



Fund raising takes planning. It also requires the commitment of the entire board of directors and a great number of members.

In their fiduciary role, board members are accountable for debts incurred and for securing the financial viability of the organization.

This section is designed to help the board and the fund raising chair plan how to best distribute the work among many persons and throughout the year.

Is Your League Prepared for Fund Raising? How Do You Score?

To focus board members on the formula for successful fund raising, ask them to answer the following readiness test prepared by a Texas consultant on development and management.* They should respond to each item as the organization currently stands, *not* how they would like it to be.

0=non-existent 2=poor 4=average 6=above average 8=good 10=excellent

Track record

- _____ • Strong, consistent programs and services.

Public image

- _____ • Solid awareness in the community regarding the mission and purpose of your organization; strong logo/graphic image and printed materials.

Volunteers

- _____ • Viable, dedicated, and active volunteer base of trained individuals.

Finance Management

- _____ • Sound accounting practices, established bookkeeping system in place, few (if any) accounts payable, cash reserve or endowment in the bank, no operating deficit.

Written plan

- _____ • Comprehensive 2-3 year strategic plan that outlines specific objectives and goals for the organization which are translated into board and member responsibilities. Programs and/or projects are clearly described *along with required finances/resources* with which to accomplish desired results.

Community support

- _____ • Broad base of support derived from individuals, businesses, corporations, foundations, civic groups, and other resources as well as donated goods and services.

Board leadership

- _____ • Trained, committed leadership who serve in key officer and committee capacities and who regularly attend board and committee meetings and meet designated deadlines.

Wealth, work & wisdom

- _____ • Ability of board members to provide financial support, time to serve on committees and provide needed support to the organization, and vision to identify what needs of the community and the organization should be addressed.

Affluence or influence

- _____ • Capability of board members to provide organization's required financial, community, and human resources and/or linkages to others who may provide resources.

Diversity

- _____ • Board members reflect the ethnic diversity, age, gender, socioeconomic levels and other aspects of the community.

TOTAL POINTS: _____

**John A. Davis, from workshop on Fund Raising for Non-Profit Organizations.*

Some Sound Principles of Fund Raising

- **Your League should have a plan for funding its work.**

Funding, like spending, must be continuous and year-round. Don't make it a once-a-year effort.

- **Fund raising goals should be tied to the League mission and to your League's goals and objectives:**

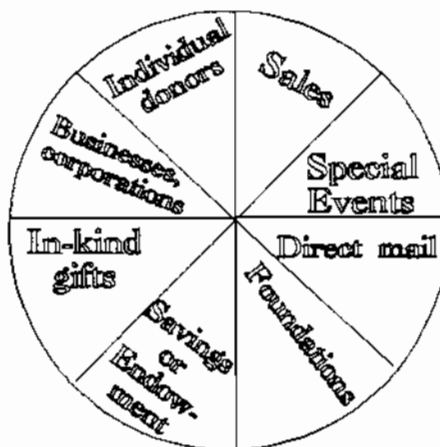
Those plans to achieve your goals and objectives should include projects which are attractive to prospective donors, those which give the donor a sense of stake holder or of sharing in the significant work of the League. Give them concrete examples of past and proposed projects, especially those *which are done by no other community organization*. From your mission, goals, and specific plans, you build a strong "case," the argument or rationale for eliciting support for the organization. Put these in writing so that board and members alike can readily explain them.

- **Involve the entire board and as many members as possible in funding efforts.**

The rewards of this rule are two-fold: both building the donor base and strengthening member commitment.

- **Support should come from a variety of funding methods and sources:**

- Corporate contributions
- Individual contributions: members and non-members
- In-kind donations
- Direct mail campaigns
- Sales: promotional items, publications, services, and advertising
- Events: auctions, workshops, garage sales, home tours, environmental shopping tours
- Foundations: proposals for special projects or for general support, usually citizen education; generally only from 501(c)(3) organizations.



Fund Raising Methods and Sources

- **Your board must understand the League's legal status with regard to tax-deductible donations.**

If your League does not have a special Education Fund classified by the IRS as 501(c)(3), the law dictates that you must make prospective donors aware that gifts to your organization, classified as 501(c)(4), are *not tax deductible*. You may solicit tax-deductible contributions to the LWV-Texas Education Fund, the publicly-supported trust set up to educate citizens in Texas communities on government and public policy issues. Some Leagues have established their own education funds for this purpose. For details on management of tax-deductible funds and projects, see the *LWV-Texas Education Fund Handbook*.

- **People give to people--the more personal the contact, the greater the probability of receiving a contribution.**

Never underestimate the value of an acquaintance, a contact, or a "connection," no matter how tenuous. It is from those loose associations that lasting bonds are built. Aim to add personal notes to fund raising letters whenever possible, even in a broad-based direct mail campaign.

- **Segment prospects according to potential contribution.**

A sensible plan is to direct the most personal appeal to those prospective donors who have potential for the largest gifts. Personal visits and telephone calls, then, are suitable for those prospects. Mail requests are the reasonable method for the larger number of donors who ordinarily give average-sized contributions.

- **Identify prospective donors.**

Ask the board and members to suggest possible donors. Use board and committee time to discuss these prospective donors. These corporate, individual, and foundation "leads" can form a database to be expanded and updated through the years.

- **Research prospects carefully to verify address, contact person, and best time to solicit.**

Ask for a company annual report if the prospect has one, as well as fiscal year and budget making schedule. Inquire of any special guidelines for giving. Especially, try to learn of the prospect's special areas of interest or concern. Suggest possible League projects and listen for indications of interest.

- **Cultivate new donors through services and special attention.**

Even *before* asking for financial support, let prospects know about the League's work. Send them your *VOTER*, Voters Guides, program publications, and even season's greetings. This is also one of the best ways to change a *no* to a *yes*.

Even when prospects decline your solicitation, continue to make them aware of your League's good work, service to the community, and reasons you merit their support. Such "cultivation" will maintain and strengthen the relationship begun with your initial request.

SHARING THE WORK:

Board and Member Responsibilities in Fund Raising

Board Responsibilities

Draft the "case" or rationale for supporting the organization and be able to explain the case persuasively to prospective donors.

Tie to League mission and your League's goals and objectives.

Assess the League's needs

Approve the fund raising plan, which includes determining funding needs, timeline, techniques, and labor needed.

- Involve board and other members on fund raising committee
- Name a chair or co-chairs to coordinate
- Put funding plan into the annual calendar
- Divide responsibilities into many small tasks to be accomplished by a number of members
- Train and guide volunteers and committee members
- Match techniques to anticipated donor levels

Research prospects

Give. All fund raisers give their own donations.

Cultivate prospects

Ask! Board should be responsible for 20% of the goal through personal giving and/or personal contacts.

Use techniques which match the anticipated giving level:

- Visits
- Telephone
- Letter with personal note
- Letters without personal note

Keep GOOD records (decide who and how).

Send thank-you's within five days, 48 hours is better.

Communicate with donors throughout the year.

- Keep donors advised of League activities both through your *VOTER* and by personal notes
- Give special treatment through delivery of League publications
- Send major contributors special invitations to all League functions

Member Responsibilities

Fund raising is not a one-person job.

In fact, the potential for involving members is excellent. Below are tasks essential to fund raising efforts, activities which would appeal to many different types of members:

___ compile list of prospects

___ research prospects

___ segment prospect list

___ draft letters

___ edit letters

___ type letters and/or envelopes

___ draft brochure

___ edit brochure

___ typeset brochure

___ arrange for printing

___ stuff envelopes

___ personalize letters

___ buy stamps

___ mail letters

___ receive contributions

___ deposit money

___ keep records of contributions

___ prepare solicitation packets

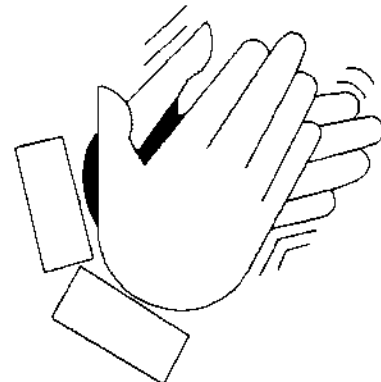
___ make telephone calls

___ make visits

___ write thank you notes

OTHER RELATED TASKS:

- plan and carry out special events
- research grant possibilities
- write grant proposals
- sell League fund raising items
- write *VOTER* articles
- develop publicity plan
- report to board
- report to members



• **CELEBRATE YOUR SUCCESS!**

DEVELOPING "THE CASE"

The case is an expression of an organization's cause--its reason for being. When building a case for a "cause organization" like the League, we work from the fundamental assumption that it exists to meet and respond to a societal need.

Even if you have a gut-level feeling for why the League is important, your case must express that feeling in a way that touches and motivates others.

Developing the case is similar to long range planning, except that it focuses on the external--what you wish to communicate to others. It is your communication platform.

Steps in building a case

• Clarification of the mission

This asks the question *Why is there a League?* or *What would happen if there were no League?*

• Goal setting

Asks the question *What would carrying out this mission in my community mean?* or

If we accomplish this, (registering voters, for instance) will it help fulfill our mission?

Do not set goals in isolation. Now is the time to reach out to the "publics"--potential individual donors, members, local businesses, potential members, heads of businesses and foundations--those with whom you want to communicate and whom you want to motivate. Take the pulse of the community, network, and lay the groundwork for obtaining future support and commitments.

• Definition of objectives

Objectives are clear, concise, definitive, measurable statements of what you intend to accomplish. They grow out of the goal-setting process and relate back to the root problem or societal need that the organization exists to meet.

• Choosing strategies

This is the brainstorming part of the process, when you identify all the possible strategies and structures that will work to implement your objectives.

Note that you are not asking, *Given our current structure, how can we best implement these objectives?* You must ask, *Given our objectives, how should we structure ourselves?* This should help you define the board/committee/volunteer structures needed to achieve your objectives. You can now plan your projects, program, and services based on these objectives.

• Budgeting and funding

Don't skimp; set figures that allow you to do a spectacular job. Nothing helps future fund raising efforts more than success. Now when you tell your contacts about your planned projects, you can show them how they can help you achieve the goals *they* helped set.

Kirsten Fuchs, Major Gifts and Planned Giving, LWVUS

SUGGESTED FUND RAISING CALENDAR

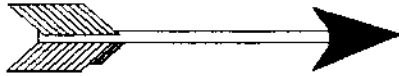
Month	Source: LWV-Richardson
1	Board conducts needs assessment Board sets goals, objectives, draft case Board appoints committee and chair, or co-chairs Committee meets, makes plan, sets goal
2	Board approves plan Appoints subcommittees Brainstorming session on prospects Appeal to members for suggested prospects Identify and research prospects Cultivate prospects
3	Compile mailing and visit lists Determine "leadership" or top donor lists Verify all data, especially contact person Make up files on prospects Segment lists Plan letters, proposals
4-5	Cultivate prospects Develop solicitation packets President solicit board commitments
6	Print packet materials Plan kick-off event Compose solicitation letters to individuals, corporations, new, old
7	Recruit workers Recruit telephone callers Plan publicity Mail kick-off invitation Stuff packets
8	Send out publicity Mail letters Hold kick-off event and volunteer training Compose thank you notes Make calls, visits Update records as gifts received Prepare report to members, media Send thank you's or call acknowledgements
9	Complete solicitation calls Send end-of-campaign follow-up letter, if needed Prepare final report Analyze and evaluate costs, techniques, proceeds for following years Update all records Bill for pledges
10-12	Show thanks to workers (party, memento, other) Board and committee make recommendations for next year



Recordkeeping

Why must fund raising records be clear and complete?

- Records of who gives, when, and how much are essential for planning future requests for financial support.



- Members deserve to know about the financial support of the organization, and only clear records can tell them.
- Tracking your efforts and their success rate helps you to avoid repeating mistakes. It eliminates the guesswork for future campaigns, tells what worked and what didn't.

From workshop by Joan Flanagan, author of *The Grass Roots Fund Raising Book*

Cost accounting and fund raising

It's important for planning of future fund raising efforts that you keep track of what works and what doesn't. This is especially true if the prospect list is segmented by potential giving levels, and different techniques are used with different segments of the list.

DO NOT keep track of income only. Tally all the costs incurred in mailing to each segment, including printing, postage, envelopes, labor.

Once the mailing is finished, you can then compare costs to income and quickly see which segments are the most productive and *how much it costs to raise each dollar*.

That information is invaluable--and essential--to properly planning your next solicitation.

From LWVUS *Fund Raising Kit*, information on prospect segmentation

A word about computers and record-keeping:

If your League is already using a personal computer for other needs, consider database management software for tracking a number of facts about each prospect and donor, including the gifts and related costs. However, even a spreadsheet or word processing package can be helpful in maintaining an alphabetical file and in recording the currency, frequency, and size of gifts.

One note of caution:

Have a secure backup system and create a printed copy at least annually!

Don't let your League be dependent upon the computer system, software, and knowledge of one particular member or director, without a plan for moving the records to a compatible system if the individual relocates or quits the job for some reason. This rule applies, of course, to *all* League recordkeeping and word processing files.

NOTE:

One fund raiser says that computerizing your records may not be absolutely necessary until the donor base reaches 1,000 who give an average of \$100 or more.

Maintaining a 3 X 5 card file can serve your needs as long as the file is kept up to date and all information is verified regularly.

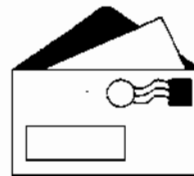
Use the reverse side of the file card to record method used each year to solicit, and costs incurred.

Contributor Record	
Name _____	
Address _____	
Telephone _____	League Contact _____
Company Contact _____	Title _____
Comments _____	

Year _____	
Amount _____	

Sample 3X5 Recordkeeping Card

REACHING OUT: Direct Mail Fund Raising



For each hour spent, direct mail always yields the greatest dollar return to your organization. Compared to a special event, which can give about \$2 per each hour, direct mail can return almost \$10.

Remember also that individuals account for more than 80% of charitable giving in America, and a mail campaign is the best method for reaching individual supporters.

This section gives a checklist of tasks related to a direct mail fund raising campaign and suggests ways to make your campaign most effective.

PLANNING CHECKLIST

Expect two to three months planning time before a mailing is sent out. For example, to send a December year-end appeal, the planning and writing must begin as early as late August, or early September at latest.

To help you to organize work, to avoid errors, and to allow sufficient time, use this checklist of basic planning tasks:

Set goals and draw up fund raising plans

- ___ Segment your list of contributors and decide on the technique to be used for each group.
- ___ Set up a schedule for the following:
 - ___ copy (with due dates for completion and approval by the signer)
 - ___ printing and production completion
 - ___ advance or follow-up telephone calls, if any
 - ___ mailing dates
 - ___ any follow-up activity
- ___ Draw up a budget of estimated costs and income.
- ___ Establish a plan to evaluate returns.

List functions and tasks to be performed and time needed for each

- ___ copy preparation
- ___ copy approval by signer or your board
- ___ art work preparation
- ___ printing and production
- ___ telephone follow-up
- ___ processing money
- ___ thank you or acknowledgement
- ___ evaluation of results
- ___ recordkeeping

Make task assignments

- ___ Set "monitoring" or deadline dates to check on progress of assignments
- ___ Launch the campaign
- ___ Report interim and final results

PRINTING/MAILING CHECKLIST



Producing a successful mailing demands careful attention to detail. Here are items vital to an appeal that often slip through the cracks:

Budget

- Estimate in advance what you want to spend on a fund raising campaign and then keep careful watch over expenditures as you put the program together.
- Weigh the sample to ensure that you calculate postage costs correctly.

Postage and postal permits

- Make certain that those doing the mailing, whether volunteers or a professional mail shop, know exactly which segments of the list get First Class postage and which get Third Class.
- If you plan to use the nonprofit Third Class postage rates, check with the mail house or the U. S. Postal Service to assure that your mailing meets the requirements for this special postage rate.
- Be sure that the Bulk Mail deposit account has funds to cover your mailing; also if Business Reply Permit is used, be sure that balance will cover any envelopes returned.

Printing, prices, and preventing problems

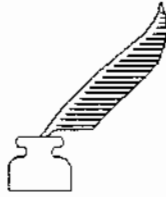
- It is always advisable to get bids from two or more printers, stationery dealers, and other suppliers for each component of your mailing.
- Remember when getting bids to specify the amount of time the printer and other suppliers will have from the date you give them copy until delivery of the job, since a rush job may cost more.
- Get all bids in writing and check your final invoices from suppliers against original bids.
- Before sending copy to the printer, be sure that the letter and return envelope will fit inside the cover envelope and, if using window envelope, that the address or mailing label show through the window.

The direct mail solicitation package has five essential parts:

- (1) *The letter*
- (2) *The carrier envelope*
- (3) *The response card (or pledge card)*
- (4) *The return envelope*
- (5) *Inserts*

The Letter

The letter is, of course, the most important part of the package. For a social action organization like the League, the "problem-solving formula" is a good letter outline to follow, but it must include concrete examples of what your League wants to accomplish, sufficient detail to explain to the reader, and why the gift is needed to solve the problem.



The fund raising letter must communicate goals to your constituency. People give in order to be involved, so you must suggest to them ways they can do this.

Two common barriers to successful fund raising:

- asking only once (or even only twice)
- the tendency to use concise or perfect writing style rather than a more personal tone.

The fund raising letter must take the place of a face-to-face visit and therefore must be an "I-to-you medium." The writing style is extremely important to the effectiveness of direct mail solicitation.

- The letter's first paragraph should be dramatic and attention-getting. It usually states the problem, then gives a method for solving it.
- If a telephone follow-up will be made, say so at the top of the letter.

- Mention your special needs: Voters Guide, a voters' "hotline," a candidate forum, or rally. Briefly mention past accomplishments, but emphasize future needs...urgent needs. Mention issues and show why the special need or project can help that issue.

- The letter should make a sincere and good case for the organization's cause and needs. The credibility factor is critical. Conveying a sense of urgency is also important.

- Treat the donor or prospect as a member; concentrate on his needs, how he can be involved. Flatter him!

- Writing tips:
Break the pages up with a variety of typography: italics, bold print, underlining, bullets, ellipses. Use only short paragraphs, but a longer letter is preferable over a short one (2-3 pages).

Make the letter communicate the philosophy of stewardship and of responsibility on the donor's part.

Good words to use:
"community" "partnership"
Make phrases personal:
"you more than most understand..."
"we have always counted on your help..." "I didn't find your name..."

- The P.S. is the second most important part of the letter. Generally, it abstracts the entire letter in one phrase. But more importantly, it speaks directly to the person addressed, almost singles him out from all the others to whom the letter is sent.
- A hand-written note does this even more effectively, and increases gifts an average of \$4 to \$6. A tactile element is also a useful extra; attach a calling card, a sticker with the League phone number or your theme slogan, any item the recipient might keep.

- Never use two signatures. This defeats the person-to-person tone.
- For an appeal to non-members, list your board (or past presidents) on letterhead. Some local Leagues have had success with a finance steering committee of community leaders. If used, put their names on the letterhead.

Anatomy of a Solicitation Letter to New Prospects

Follow this outline to write effective fund-raising letters (or as an outline for your presentation during a personal visit):

- State the problem.
- Tell what's being done now about solving the problem.
- State what needs to be done.
- Tell what your organization proposes to do about the problem--then communicate how you can do it.
- Let readers know that your organization has broad-based support.
- Explain what it will cost to do what you want to do.
- Explain what you want readers to do--and when.

Source: David Church, cited in *Contributions*, 634 Commonwealth Ave., Suite 201. Newton Centre, MA 02159.

Solicitation to a Prior Donor

- Thank the donor for previous gifts.
- Tell what was done with those gifts, make reference especially to the donor's most recent gift.
- Tell what needs to be done and how your organization can address the problem.
- Tell about goals for the coming year and why they depend upon the donor's support.
- Persuade the donor that you offer something that the donor wants and needs--that the work done by your organization advances those issues the donor supports.

Direct Mail Letter

Make your first paragraph dramatic and attention-getting.

Early in the letter explain why you need the donor's help by suggesting that there is a problem and that your organization has a solution for it.

This is your opportunity to make a sincere and solid case for your cause and needs.

Each year the League of Women Voters appeals to concerned and active people like you to be a part of our efforts. Because we know that you, too, care about democracy and our community, we hope that you'll join us. With your help, we can continue to be a force on the local political scene.

Your financial contribution will help us to provide vital services to Tyler voters, such as unbiased and nonpartisan *Voters Guides*, voter registration, candidate meetings and public forums. It will help us carry out studies on local, state, and national issues.

We would acknowledge your support in our monthly newsletter the *Tyler VOTER*, which is mailed to more than 200 Tyler area residents and businesses. As a contributor, you will receive that newsletter to inform you of League activities; you also receive details on how to contact your elected officials, *Voters Guides* in statewide elections, and special invitations to candidate meetings and forums.

Please use the enclosed response form to indicate how you choose to contribute. While your donation to the League of Women Voters of Tyler is not tax deductible, you may elect to give a tax-deductible contribution to the League of Women Voters of Texas Education Fund. That donation will still be available for use by our local League for projects to educate citizens and voters. A return envelope is also provided for your convenience.

Thank you for helping to improve citizen participation in our government. If you, too, believe that "the most important thing we do as citizens is vote," you'll exist in this important campaign that the League has launched by investing in the League of Women Voters of Tyler.

Sincerely,

Shari Koukl

Shari Koukl

President

P.S. If your contribution arrives before the November 3 election, we'll send you a *Voters Guide* with responses from candidates in for important races.

I hope that you can continue your support. We're depending on you!
SK

S. K.



October 20, 1992

Dear Friend,

I recently heard a comment that stuck in my mind: "The most important thing we do as citizens is vote."

During the past few months as campaign advertising pervades every newspaper and leaves little commercial television time for pain relievers or bowl cleaners, that comment has popped into my conscious thoughts again and again. If that comment is true (and I sincerely believe that it is), the work of the League of Women Voters of Tyler is more important than ever!

The disheartening fact is that with each election voters become more disenchanted and are less inclined to participate. That's why we are asking for your help. We hope that you will become a partner with the League in our efforts to change this fact.

The League of Women Voters of Tyler is a nonpartisan organization of men and women who believe that democratic government depends upon the active participation of its citizens in their government. That's why the League promotes voter education so that every vote cast is as informed and as knowledgeable as possible. Building a commitment to democracy is what the League has always been about. Let's face it: democracy works best when as many citizens as possible are involved in the process.

Through the years the League has been involved in education and action that affect all areas of the community—registering voters, providing unbiased information on elections and ballot issues, studying community problems. If you've lived in Tyler, you'll remember what the League has done.

This year promises to be a productive one for the Tyler League as well. During the past two months we have tallied some remarkable records:

- We have registered more than 1000 new voters.
- We brought voters face to face with candidates for elective office, providing objective information to help voters make informed choices.
- And we provided information on critical issues in order to get citizens involved beyond the polling place!

That's why we look toward the rest of the year with confidence that we can make a difference.

And we know that you are aware that the democratic process involves more than just voting. Just look at how this year League members went the extra step to become involved in day-to-day government:

- We convinced the Smith County Commissioners to designate early voting in retail locations to make voting more accessible and to increase voter turnout.
- We recommended election of school trustees by single member districts, after researching which type election makes trustees more responsive to constituents and more representative of the voters.
- We cosponsored Earth Day 1992 and the first Household Hazardous Waste Collection Day in East Texas.

Certainly Tyler and Smith County cannot risk loss of the benefits the League of Women Voters provides to the community.

LEAGUE OF
WOMEN VOTERS
OF TYLER
P.O. Box 6111
Tyler, TX 75711

The P. S. is the second most important part of the letter. It speaks directly to the person addressed. A hand-written note does this even more effectively.

You might let the P.S. summarize the entire letter in one phrase.

Make the tone of your letter personal—always in the first person.

Use a variety of typography and short paragraphs.

Use words that emphasize the donor's role in your work.

Solicitation to a Past Contributor



League of Women Voters of Richardson

P.O. Box 831811 Richardson, Texas 75083

*Don't fail to mention
the amount of the
contribution in past
years.*

*Try to use the donor's
name several times
throughout the letter.*

February 12, 1987

Sam Smith
What's It Company
P.O. Box 330000
Richardson, TX 75083

Dear Mr. Smith:

Thanks to the wonderful support of civic-minded companies such as What's It Company, the League of Women Voters of Richardson is continuing its service to the community. Please join us in celebrating our 25th Anniversary.

Our 1987 fund raising drive is underway, and we know that your company, What's It Company, will want to help us reach our goal of \$9,000.

Your contribution of \$10,000 last year allows us to continue our efforts in promoting citizen participation in government. As a nonpartisan organization, we publish comprehensive voting information, conduct voter registration drives, organize public forums, and study timely issues on all governmental levels.

This past year the League received community recognition for our participation in the City Plan Commission's development of the Comprehensive Land Use Planning Guide.

We hope that you'll take a moment to read through the enclosed brochure which tells about our services to the community and that you'll feel free to ask any questions you may have when one of us calls on you.

Cordially yours,

Robin Notestein
President

RN/mn
Enclosure

The Fund Raising Mail Package

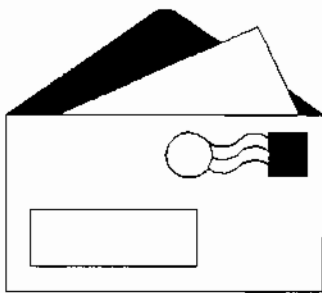
A fund raising mail package refers to all the parts included in your mailing: the letter, the carrier envelope, the response or pledge card, the return envelope, and any inserts.

Some tips on the package:

- When a theme is used, use it throughout the package, several times in the letter, and even on the carrier envelope. Don't forget to mention the theme in the thank you letter.
- Don't economize on the response materials. If you must choose, invest more in the return envelope and the response card than in the carrier and letter, as these will stay with the prospect longer.
- As with the letter, customize the response card to the individual or company.

The carrier envelope

The envelope should telegraph a message of its content. Mark the outside in some way to call attention to its significance, to draw the recipient to open it.



If mailing to non-members, omitting the return address is a technique used as a teaser to induce the prospect to open it.

The response card (or pledge card)

The response card, like the postscript, abstracts the entire content of the letter. It must tell the reader:

- what to do
- how much to give
- when to give
- where to send it

Fill in the person's name and the dollar amount on the response card. For prior donors, ask for a specific amount which will prompt an upgrade. A good rule is to double their last gift.

The more options given, the less likely you are to receive money.

On the response card you may want to tie the dollar amount to a project, with reference to it in the body of the letter.

The response card should also show if the gift will be tax deductible. Or you may offer either a tax-deductible or a non-deductible option and tell the donor how to make out the check.

The return envelope

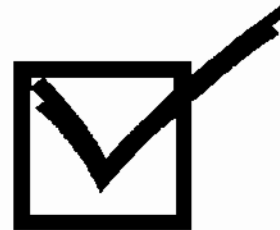
Prepaid postage, using a Business Reply Permit, is useful in eliciting gifts. For any previous donor of \$25 or more, it is best to use a first class stamp.

Inserts

News clippings, a brochure, a background sheet or precis, photographs, and testimonials are all possible inserts to bolster credibility of the appeal. However, avoid anything too slick, stylish, or graphically sophisticated. Direct mail is a homespun medium.



An optional element of the solicitation package is a poll or survey attached to the response form. This technique further bonds the donor to the organization, gives a sense of belonging and that his opinion is valued.



Three pointers on fund raising mail campaigns:

- **Mail several times a year** (at least 4 times).
- **Customize letters.** Always use different letters for prospects, past donors, and for members. Best also to customize for tax status preference. Show concern for the donor by calling first to ask preference so that letter is specific to his needs.
- **The best time to ask for money is immediately after someone has given money.** Always include a stamped return envelope with the thank-you note. A telephone call thank-you is a wonderful way to lead to upgrading.

From workshop presented by Roger Craver of Craver, Mathews, Smith & Company, Inc.

The Response Card

The response card is one of the most important parts of the direct mail solicitation package. It may stay with the prospective donor for a long time. Plan it well and don't conserve on quality.

ANNUAL DEVELOPMENT CAMPAIGN

League of Women Voters of Dallas, 2727 Inwood Road, Dallas 75235

Enclosed is my gift of \$500 \$250 \$_____ to LWVD and/or LWVDEF (If gift is to be made to both "LWVD" and tax deductible "LWVD-Education Fund", SEPARATE CHECKS MUST BE MADE TO EACH.)

An additional gift of \$_____ will be sent (date) _____

I pledge my gift of \$_____ to be paid semi-annually quarterly and enclose my initial installment of \$_____

Send information on planned giving methods such as bequests, trusts, life insurance, annuities, jewelry.

My employer will match this gift. Enclosed is my firm's matching gift form and/or check for \$_____

Name _____

Address _____

Phone _____

The IRS requires that your solicitation materials state that donations are not tax deductible, unless made to a qualifying education fund or 501(c)(3) organization.

LEAGUE OF WOMEN VOTERS OF MIDLAND

NAME/TITLE _____

COMPANY _____

MAILING ADDRESS _____ ZIP _____

Contributions payable to the LWV-Midland are especially appreciated. Though not deductible as charitable contributions for tax purposes, they may be deductible as an ordinary and necessary business expense.

To make a donation tax deductible as a charitable contribution, make your check payable to LWV-Texas Education Fund, a 501 (c) (3) organization. It will be used only for citizen education activities in Midland.

Enclosed is my/our contribution of \$300 \$100 \$50 \$25 Other _____

This contribution is for LWV-Midland LWV-Texas Education Fund

You may publish my name as a contributor in 1993 finance brochure Yes No

Send all contributions to

LWY-MIDLAND • P.O. BOX 7437 • MIDLAND, TEXAS 79708

For further information, contact Jayne Krawietz, 897-2168

Richardson Daily News

• Established 1888
Lola Wetzel Brown
EDITOR

Robert Keeter
ADVERTISING MANAGER

Let others do
your bragging!

League programs deserve support

The League of Women Voters of Richardson is in the midst of preparing for perhaps the busiest year the local organization has ever had. Not only is this a presidential election year, with the usual election-related projects, but the added interest generated by Texas' early primary this year spurred the organization into extra duty.

Last month, the local 60-member League operated booths in area malls and at Richardson Library, signing up hundreds of voters. And now the finishing touches are being put to a *Voter Guide* that will be distributed to local citizens before the March primary.

At the same time the League is deep into preparations for the Super Tuesday election, members are conducting their annual drive to raise funds to support these worthwhile projects. Letters are going out this week to about 500 potential, local contributors, asking for financial support for the group's \$9,000 annual budget. Letters are being mailed to

members, former members, other organizations, corporations and community leaders, according to Robin Notestein, League president.

Notestein told a *Daily News* reporter that the bulk of the money raised by the League goes to voter services, particularly the *Voter Guide*. The second major portion of the money goes to such programming as Town Hall meetings, candidate forums and special study projects. One such study now near completion relates to the need for daycare facilities in Richardson.

Of the \$9,000 needed by the League for 1988 expenses, approximately \$1,500 probably will come from members and \$7,500 from the community, Notestein said. This seems a small enough request for the many vital but low-profile services provided by the organization.

The programs of the League of Women Voters are of communitywide importance and are well deserving of communitywide financial support.

Clip those news articles
praising your League's work.

Include copies as part of
your mailing... or carry
along on a personal
visit!

DO YOUR HOMEWORK: The Business Contributor



Businesses and corporations account for about 7% of charitable giving. No matter whether your League is located in a large or a small city, the local business community can be an important source of financial support.

Businesses are always a reliable source of "leadership gifts," those larger donations you should seek at the start of your campaign to "lead the way" for others to give.

This section can direct your board in expanding the base of donors through research, brainstorming, and personal contacts.

Identifying and Researching Business and Corporate Contributors

Identifying prospects

Chamber of Commerce membership lists, newspaper and magazine articles, donor lists of other organizations, and the telephone directory can all produce leads for identifying corporate donors. Other published sources include *Standard & Poor's Directory* and other business directories with geographical listings.

Refer to the bibliography at the right for additional help on researching companies and writing successful request letters.

The purposes of most corporate contribution programs are threefold:

- to enhance the company image
- to support employee causes and interests
- to support those interests supported by the CEO, and to enhance the CEO's image

Remembering these points can help you determine what you need to know about companies and their owners or executives to help to secure their support for your League.

Researching a corporation or corporate foundation

- **Know their guidelines for giving and preferences for what the company will support.**
Call to ask for their annual report or for any giving or grant guidelines published by the company. Ask other organizations what the company has given in the past. If those are not obtainable, check library sources such as *Standard & Poor's Directory*.
- **Know the company's market area and financial status.**
Knowing where the company does business will help you to judge the scope of its charitable support, whether local, state, or

national. And while financial hard times do not necessarily mean suspended giving, this could affect the size of the gift.

Continue to cultivate a company through hard times, make them aware of your work, and ask for support for your League. Then they will be there when the situation improves.

- **Before an interview, send basic information about your League:** publicity materials, a brochure, a background paper or precis, a proposal if asking for a special project. Send with a cover letter confirming the date, time, and who will be there.
- **Decide what you are "selling."**
Based on the research done about the company, decide which League programs or projects would be most appealing to this particular company, especially to the CEO. Compile a packet describing these and call someone (secretary, administrative assistant, or the person in charge of charitable giving) to see if it is appropriate.
- **Decide how much you will ask for.**
For a specific project, don't ask for too little; but never ask for more than 20 percent over your anticipated needs.

Researching an owner or executive

- **Know affiliations.**
Gather lists of local boards, donor lists, church directories, and other local information to use as reference material for your research.
- **Know family affiliations.**
- **Know social ties, especially to any League members.**

Adapted. *Development Today: A Fund Raising Guide for Nonprofit Organizations*. Dr. Jeffrey Lant. Revised 5th Edition, 1993. 282 pages. \$29.95 postpaid. JLA Publications, 50 Follen Street, Suite 507, Cambridge, MA 02138.

Suggested Sources

Corporate Foundation Profiles.

Dermer, Joseph and Stephen Wertheimer. *The Complete Guide to Corporate Fund Raising.*

Dun & Bradstreet Million Dollar Directory.

National Directory of Corporate Giving.

Sinclair, James P. *How to Write Successful Corporate Appeals.*

Sourcebook Profiles.

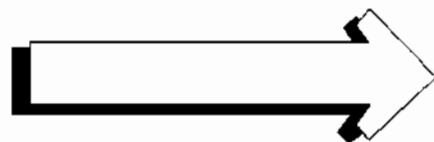
Standard & Poor's Register of Corporations, Directors, and Executives.

Taft Corporate Giving Directory.

Here's an Idea

Use a form similar to the one on page 19 to record information on local businesses and companies, large corporations, and owners and executives. Be sure to list contacts within your League.

Each year before soliciting the company, confirm the company contact by telephone.



PROSPECTIVE BUSINESS OR CORPORATE CONTRIBUTOR

Company Name _____

Mail Address _____

Location _____

Phone (____) _____ FAX (____) _____

CEO or owner _____

Affiliations (schools, clubs, boards, family, etc.)

Address letter to _____

Title _____

Fiscal Year _____ Annual report? _____yes _____no

Market area _____

History (given to League in past? give to other like organizations? etc.)

Special interests, preferences - how do these correspond to League issues and interests?

League contact(s) _____

Are you willing to make a visit or follow-up call? _____yes _____no

Submitted by _____ Date _____

Researched by _____ Date _____

Attach any donor lists, newspaper or magazine clippings, brochures, photos, etc. and return this form to:

CULTIVATING CONTRIBUTORS

A corporate executive once wrote:

"One of the most disappointing aspects of working with organizations seeking philanthropic funds is the recurring experience I have had with organizations receiving generous support and quickly forgetting both the donor and that donor's act of generosity.

We hear so much criticism of corporate insensitivity to the needs of our non-profits, but what about the non-profits themselves?

During a campaign most organizations are alert to the need to keep their donors informed of progress and the results of corporate beneficence. But, after the campaign is over, how many gift recipients maintain a sustained dialogue with their benefactors?"

Charles E. Lawson, President - Brakely, John Price Jones, Inc.

Listed below are some suggested ways to "cultivate" contributors and prospective contributors.

- Send them all new League publications.
- Mail them your monthly *VOTER*; regularly list contributors there.
- Invite them to special League functions.
- Notify them when your League has received funding for a special project or has gained recognition.
- Let them know of League accomplishments and community education efforts.
- Keep them informed--by mail or by phone--of the status of your fund raising campaign.
- Send holiday greetings.
- Congratulate them on company successes, awards, honors.
- Send copies of any newspaper clippings mentioning the company.
- *STAY IN TOUCH!*

*Past donors are
your best prospects,
so keep in touch.*

**PERSON TO
PERSON:
The Personal
Solicitation**



Experience has shown that when the organization's compelling story is personally explained and understood by business people, the chances of a favorable response are enhanced. As a result, many companies which contribute regularly may increase their gifts, and those that have never assisted may become active supporters.

Aldo C. Podesta, Senior Vice-President, The Advertising Council

PERSON TO PERSON - THE KEY TO SUCCESS

*The Perfect Solicitation**

- 1) Make your own pledge first.
- 2) See your most likely prospect first.
- 3) Take someone with you.
- 4) "Eyeball to eyeball" is the only way.
- 5) Plan every call in advance.
- 6) Say: "I picked you" to call on.
- 7) Sell ideas!
- 8) Don't apologize.
- 9) Never argue.
- 10) Aim high. (Ask for a specific amount.)
- 11) Try to get the pledge card signed that day.
- 12) Be enthusiastic, sincere, and persistent.
- 13) Success depends on you.
- 14) Regardless of the outcome of your interview, don't forget to say THANK YOU!



- 15) Remember, people give to people, as much or more than they do to causes.

**Borrowed from the Greater Boston YMCA's Campaign:
"Continue the American Dream"*

The Solicitation Packet: What to Take on Calls or Include in Your Solicitation Letter

- Background sheet or precis:
What does your League do that is unique?
Why does the community need your work?
- Brochure describing your League's good work in the community
- Annual report or financial statement
- For tax exempt funds: letter of determination of 501(c)(3) status
- Pledge card
- References and endorsements of your League
- "Wish List" or menu of activities to be funded
- Board list
- Newspaper clippings about your League
- Q&A: Questions & answers you anticipate prospective donors might ask

Basics of a fund raising brochure or background piece

- Campaign theme, if there is one
- List of your board of directors
- History of organization: national, state, local
- League mission
- Success stories: brief paragraph for each, citing endorsements (quotes), quote newspaper articles
- Supporters for previous year (some include past 3 years)
- Critical role of the League - best reasons to support, how unique
- Fund raising objectives - amount sought for each and justifications
- Categories or levels of giving (may instead include on pledge card)
- League mailing address, telephone
- Name of person to contact

From Development Today: A Fund Raising Guide for Nonprofit Organizations, by Dr. Jeffrey Lant.

The Background Piece

1986:

- Voter Registration 850 new voters registered (May & November elections)
 - Voters Guides870,000 (May & November elections)
Compiled, edited and proofed by League volunteers
Printed by Dallas Times Herald (Thank you - DTH!)
70,000 distributed by League volunteers to libraries,
businesses, etc.
800,000 - 2 weekend editions - Dallas Times Herald
 - Speakers Bureau Available free to any group
 - Observer Corps League volunteers continue to observe meetings of Dallas City Council, City Plan Commission, and Commissioners Court
 - League Office Daily answers or refers many telephone questions about how to register to vote, where to vote, names & addresses of elected officials, etc.
 - Pilot Project - Live Cable Coverage - After a 1-month pilot initiated by the League, City Council decided to continue weekly live coverage of council meetings (Wednesdays-Heritage Cablevision-Ch.17B)
Dallas City Council
 - Fair Park January, 1986 - A Tour - Open to Public - Study of Improvements, resources available, and future plans for the park
 - Public Forum May, 1986 - "Financing the Federal Government - Entitlements"*
 - Public Forum September, 1986 - "Health Care for the Medically Indigent"*
 - Candidates Debate October 23, 1986 - 7:15 pm - First Unitarian Church
District Attorney Candidates - Royce West & John Vance
County Judge Candidates - Kathryn Cain, Max Goldblatt,
& Lee Jackson
 - Study and Action Continuous through our many committees and bi-monthly unit meetings on Tax Reform, Domestic Violence, Halfway Houses, SDI (Strategic Defense Initiative), Urban Planning, Taskforce on Housing, National Deficit.
- *Repeated on Heritage Cablevision - Ch.98

550 volunteers . . . men and women . . . "We're Working For You!"

League of Women Voters of Dallas

2727 INWOOD ROAD • DALLAS, TEXAS 75235 • 214/351-4125

This background piece effectively summarizes the accomplishments of LWV-Dallas.

Great to include in a mailing-- or to carry on a personal visit!

Adopt a slogan for your finance campaign... use it throughout on everything.

SAYING THANKS: The Acknowledgement

Success is more than identifying people who will say yes. It is knowing how to persuade those who either say no, or fail to respond.

Dr. Jeffrey Lant, *Development Today*

When the answer is "yes"

From LWVUS Fund Raising Kit

An important part of any direct mail fund raising plan is the thank you or acknowledgement letter. In addition to providing a common courtesy to your contributors, the thank you letter also serves to further bond donors to the League.

- **Thank the donor**, mentioning the amount of the gift.
- **Remind the donor which programs are benefiting** from the latest contribution. The goal is to assure that the donor feels appreciated and that your League is dependent upon the donor's support.
- **Use a handwritten personal note.** It is a thoughtful gesture and further strengthens the donor-League relationship.
- **Include a business reply envelope in acknowledgement packages.** This will provide an excellent source of what is termed "bounce back" gifts. Bounce-back gifts are those that come back in an envelope you enclosed without making another outright solicitation or even mentioning the return envelope in the acknowledgement letter.
- **Have a turn-around time of 24 to 48 hours for acknowledgement of a contribution.** This significantly increases the likelihood of a bounce-back gift.
- **Telephone thanks to a donor**, an excellent technique for upgrading the donor's future gifts.



When the answer is "no"

From Development Today: A Fund Raising Guide for Nonprofit Organizations, by Dr. Jeffrey Lant.

Success is more than identifying people who will say yes. It is knowing how to persuade those who either say no, or fail to respond.

- **Be prepared** for whatever answer you get. Never let yourself be surprised. By using marketing savvy and having ready a number of appropriate response letters, you are prepared to try to move that prospect to a yes!
- **Send a letter thanking the prospect** for the time invested in consideration of your request.
- **Acknowledge that the prospect is still concerned** about the League's work, and promise to keep the prospect informed of your League's ongoing programs and services to the community.
- **Suggest that the League intends to request support again in the future.**

Continue to cultivate this prospect, including progress reports on fund raising efforts.

How the telephone can help when a specific proposal is rejected:

Within 48 hrs after a proposal is declined, and after you've reaffirmed that this source can help, call the person who signed the rejection letter. You need to know why, and you need to build a relationship with the prospect.



Opening:

"I see that you are unable to fund us just now, and I'm calling to find out how we can work together in the very near future."

Ask:

- what would have made the request more attractive, or the proposal stronger
- what comments he/she or the board members had about the League or the proposal
- when it might be possible to return with other materials of help to the prospect
- whether a visit might help change the prospect's mind
- what other sources of funding the prospect might suggest

Closing:

"I know that you are interested in...(your project), and I'd welcome the possibility of keeping you informed about our work."

Immediately send a letter confirming that you understand what you have been told. Thank the prospect for the time given. No matter how uncooperative, the person has nonetheless given you something invaluable--time. Indicate that you plan to strengthen any weaknesses noted and that you will send copy of the new document when ready.

Once 75% toward a project goal, send this prospect a second request, listing those who have already supported it.

OTHER FUND RAISING METHODS



Special events serve the League in many more ways than increasing income. They gain public attention, attract new members and supporters, involve members, build morale, and offer a kind of fellowship not easily fit into League schedules.

Sales of products, publications, and services are also significant income producers and should be a part of every organization's funding plan.

Foundation funding, although limited to education projects, can be a major source of restricted income. The time involved may vary from a simple letter to a complex proposal with many attachments. Just as with a special event, it is important to compare the time invested against the benefits gained.

Organizing a Special Fund Raising Event

The key to a successful event is organization, and one way to become organized is to develop and follow checklists. These basic checklists that apply to any event were adapted by The Grantsmanship Center from *The Grassroots Fundraising Book*, by Joan Flanagan.

Checklist for Assets

What do we already have in the organization to make this fund raising project a success? What factors should we consider in choosing an event?

PEOPLE

- Leaders--their time and talents
- Members with experience with this kind of event
- Total number of members who will attend or contribute
- Possible allies and new members who will get involved

MONEY

- Seed money available for the event--from treasury, loan, advance sales
- When will we have to spend the money? When will the money come in? What is our break even point (income=expenses)?
- Who will handle the money coming in? Who will control money going out?
- Bank--will we need a separate account? Do we need any special arrangements to handle lots of cash?

TIME

- How much time does the organization want to spend fund raising? Is there any way to shorten it?
- Are there any major conflicts in the organization's calendar? The community calendar?
- How much staff time do we want to allocate to this project?
- If this event is to be repeated annually, is this the best time of the year for it?
- What consideration should we make for bad weather? E.g. an alternative show/rain date, inside location, or insurance.

Checklist for Goals

What do we want to achieve from this project?

- Amount of money, NET. Percent of annual budget.
- Number of people involved. Where and how.
- Number of leadership roles possible
- Experience. Which new skills will be learned? What do we want to know for the next event, and for this event next year?
- Who will take the leadership positions?
- How will it challenge the elected leaders?
- What will be the publicity generated? How much, what kind, where?
- Number of new members brought in
- What will be the psychological effect of the event: Within the community? Outside the organization to people you want to join?
- Can it be repeated--in six months, one year? What is the probable income increase next time?
- Which new sources of income will we reach?
New members
Non-member individuals
Institutions--businesses, churches
Foundations
- Organizational advantages-- morale, new people, new area, new style event
- FUN!

Checklist of Basics for All Events

- Notification of the police
- Proper insurance
- ASCAP license if music formed
- Cash boxes
- Cash in proper denominations for each cash box
- Receipts
- Literature on your organization: Current newsletter or fact sheet
Written notice of next meeting or events
Membership cards
Sales merchandise--buttons, cook books research, etc.
- Sign-up list (can best be accomplished with door prize)
- Name tags
- Emergency numbers--police/fire
- Cash for emergencies/coins for pay phone
- First aid kit
- Name of doctor or nurse who will be present
- Pens, tape, poster board, markers
- Errand runner for emergencies and forgotten items
- Watch
- Comfortable shoes
- All necessary phone numbers--band, host, speakers, ice
- Fire extinguisher (know how to operate)
- Sound system

And don't forget:
Sense of humor, tact, patience and imagination!

Seeking Foundation Funding

This proposal writing outline is abstracted from *Program Planning and Proposal Writing*, by Norton J. Kiritz, published by The Grantsmanship Center.

SUMMARY

Clearly and concisely summarizes the request.

INTRODUCTION

Describes the agency's qualifications or "credibility".

PROBLEM STATEMENT OR NEEDS ASSESSMENT

Documents the needs to be met or problems to be solved by the requested funding.

OBJECTIVES

Establishes the benefits of the funding in measurable terms.

METHODS

Describes the activities to be employed to achieve the desired results.

EVALUATION

Presents a plan for determining the degree to which objectives are met and methods are followed.

FUTURE OR OTHER NECESSARY FUNDING

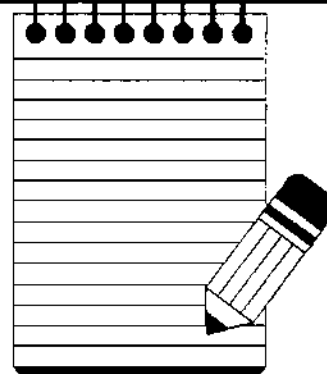
Describes a plan for continuation beyond the grant period or the availability of other resources necessary to implement the grant.

BUDGET

Clearly delineates costs to be met by the funding source and those to be provided by the applicant or other parties.

ATTACHMENTS

Board and staff qualifications for carrying out the project.



Twelve Tips for Writing Proposals

1. Write from the standpoint of meeting the donor's needs, not just the needs of your organization.
2. Follow the guidelines provided by the prospective donor.
3. Write concisely and to the point. Avoid lengthy rhetoric and verbosity. *More* is not usually *better*.
4. Your proposal should be interesting, if not compelling. However, avoid sensationalism and yellow journalism.
5. Be specific about what you are asking of the donor.
6. Generally, use short, familiar words. But if a longer word works better, use it.
7. Be certain of the meaning of the words you use and spell them correctly.
8. Let several colleagues critique your writing.
9. Edit, proofread, polish. Edit, proofread, polish. Ask at least two other people to proofread.
10. Schedule your time and pace yourself to avoid last-minute, panicky rushes.
11. Use rejections constructively.
12. Use acceptances and approvals constructively also. Ask why your proposal was accepted. Then use those strengths in future proposals.

C. C. Baker, Jr., Development Officer
Tyler Junior College

Fifteen Fatal Flaws in Fund Raising

- Incomplete planning
- Minimal board commitment
- Indifferent staff
- Setting goal too high
- Involving too few members

- Improper use of corporations, foundations
- No attempt to gather links (people give to people)
- Failure to cultivate potential donors
- Failure to solicit "leadership gifts," those who can afford to give larger amounts
- Lack of coordinated effort

- Announcing goal before realistically assessing the chances for campaign success
- Failure to say "thank you"
- Failure to seek funds for endowment or savings
- Carrying out a campaign without training or experience
- Lack of persistence

From *Development Today: A Fund Raising Guide for Nonprofit Organizations*, by Dr. Jeffrey Lant.

SUGGESTED READING

Broce, Thomas. *Fund Raising: The Guide to Raising Money from Private Sources*. Norman: Univ. of Okla. Press, 1992. \$22.95.

Dermer, Joseph and Stephen Wertheimer. *The Complete Guide to Corporate Fund Raising*. Arlington: VTNC, 1982. \$17.75.

Dollars and Sense: The Art of Raising Money. League of Women Voters of the United States, 1976. Pub. #494. \$.75

Flanagan, Joan. *The Grass Roots Fundraising Book: How to Raise Money in Your Community*. Arlington: VTNC, 1982. \$9.95

Flanagan, Joan. *The Successful Volunteer Organization*. Chicago: Contemporary Books, Inc., 1981. \$8.95

In League. League of Women Voters of the United States, 1989. Pub. #275, \$6.00.

Lant, Dr. Jeffrey. *Development Today: A Fund Raising Guide for Nonprofit Organizations*. Revised 5th Edition, 1993. 282 pages. \$29.95 postpaid. JLA Publications, 50 Follen Street, Suite 507, Cambridge, MA 02138.

Lautman, Kay P. and Henry Goldstein. *Dear Friends: Mastering the Art of Direct Mail Fund Raising*. Taft Group, 1984. \$47.50.

Sinclair, James P. *How to Write Successful Corporate Appeals--With Full Examples*. Taft Group, 1982. \$21.95