

Building Your Nest Egg

An Introduction to Raising Funds for
National Wildlife Refuge Support Groups

Beverly Heinze-Lacey



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*For Kathleen and Max
and all those other little baby "birds"
who will be the decision makers of the future.*

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Acknowledgments	iii
Introduction	1
Introduction	3
Building Your Nest Egg: Nature’s Model	3
Putting Nature’s Model to Work	4
Friendraising (“Courtship”)	7
Relationships Are Key	9
<i>Why do people give?</i>	9
<i>Making and keeping friends</i>	10
The Power of Saying “Thank You!”	11
<i>Story</i> — Cultivating Relationships Proves Key to Success in Adversarial Climate	
<i>Friends and Volunteers of Refuges (FAVOR)</i>	13
<i>Story</i> — Making Connections Spells Success	
<i>Friends of Anahuac Refuge</i>	15
Getting Your House (“Nest”) in Order	19
Organizing a Friends Group for Fundraising Success	21
<i>People</i>	21
<i>Equipment and Information Management</i>	21
<i>Financial Management</i>	23
<i>Story</i> — Creating a Solid Organization for a Solid Future	
<i>Friends of the Upper Mississippi River Refuges</i>	25
Board Commitment is Key	27
The Advisory Board	28
<i>Story</i> — Fundraising Involves the Whole Board	
<i>Friends of Blackwater NWR</i>	29
Planning	32
<i>Who Benefits From Your Group’s Plans?</i>	33
<i>What Kind of Plans Does Your Group Need?</i>	35
<i>“Yikes! That’s a Lot of Planning!”</i>	36
The Case Statement	37
<i>Story</i> — Planning Leads To Fundraising Success	
<i>Friends of Tualatin River NWR</i>	40

Tools for Success (“Nestmaking Materials”)	43
Where Does the Money Come From?	45
<i>From Membership to Major Donors</i>	46
<i>Attracting Members</i>	47
<i>Story</i> — Recruiting and Retaining Friends	
<i>Friends of Bosque del Apache NWR</i>	57
<i>Story</i> — Cultivating Members — A Key To Fundraising Success	
<i>Friends of John Hay NWR</i>	60
<i>Giving Programs</i>	63
<i>Story</i> — FoBB Friendship Quilt	
<i>Friends of Black Bayou NWR</i>	68
<i>Story</i> — Fundraising Surprises — The Pleasant Kind	
<i>Friends of Rhode Island Refuges</i>	69
<i>Story</i> — Keys To Building A Successful Capital Campaign	
<i>“Ding” Darling Wildlife Society</i>	70
Cooperating Associations	74
<i>Why Start a Refuge Sales Outlet?</i>	74
<i>What Are the Risks?</i>	75
<i>Why Do Businesses Fail?</i>	75
<i>Planning for Success</i>	76
<i>Getting Started</i>	76
<i>Your Store:</i>	77
<i>The Cooperating Association Agreement</i>	79
<i>Need Help?</i>	82
<i>Story</i> — The Bookstore Committee	
<i>“Ding” Darling Wildlife Society, Florida</i>	84
<i>Story</i> — What It Takes To Set Up A Bookstore	
<i>Friends of Blackwater NWR</i>	87
<i>Story</i> — Taking Care of Business — Making it Legal	
<i>Friends of Rhode Island Refuges</i>	89
<i>Story</i> — Keys To Running A Successful Bookstore	
<i>Friends of Blackwater NWR</i>	91
Fundraising Events	93
<i>Story</i> — Launching a Group with a Special Event	
<i>SEWEE</i>	97
<i>Story</i> — Festival of the Cranes	
<i>Bosque del Apache NWR</i>	99

<i>Story</i> — Don't Sell a Lunch, Get Them To Come!	
<i>Friends of Black Bayou</i>	102
Foundations, Corporations and Grantwriting	104
<i>Getting Money from Foundations</i>	105
<i>Fundraising from Corporations</i>	107
<i>Writing a Grant</i>	108
<i>Some Closing Tips:</i>	114
Public Relations	115
Summary—Keys to Building Your Nest	119
Make It Happen!	121
<i>About the Author</i>	122
<i>About the Publishers</i>	122
Reference List	123
Resources	125
<i>Refuge Support Group (Friends) Partners</i>	125
<i>Other Resource Organizations</i>	125
<i>Books</i>	126
<i>Additional Reading</i>	127
<i>Publications</i>	127
<i>Publishers</i>	127
<i>Videos</i>	128
<i>Other Useful Websites</i>	128
Appendices	129
Appendix A	135
<i>Guiding Principles for the Friends/ U.S. Fish and Wildlife Relationship</i>	
Appendix B	137
<i>Friends Of The Upper Mississippi River Refuges Procedures—Finance</i>	
Appendix C	143
<i>Friends of Tualatin River Use of a Case Statement for Fundraising</i>	
Appendix D	145
<i>J. N. "Ding" Darling National Wildlife Refuge Book Sales Quality Statement January 1986</i>	
Appendix E	147
<i>Sample Cooperating Association Agreement</i>	



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Introduction

Introduction:

Fundraising can seem like an impossible task for many National Wildlife Refuge Support (“Friends”)¹ Group members. Most groups are made up of volunteers who care deeply about their refuges, but who feel overwhelmed by the idea of raising the funds they need to make their organizations succeed in the long run. Despite this common concern and living on shoestring budgets, Friends groups around the country report extraordinary successes. Yet, we all want to do more and that takes money.

The purpose of this book is to provide a framework that will help your group become successful fundraisers. **Raising funds is really all about making friends.** It is your friends who will become your most ardent supporters—and they will show their support through their financial contributions. If you position your group to make and keep lots of friends, you will find yourself succeeding at raising funds.

This book is not intended to be a detailed “how to” guide on fundraising—there are some excellent books and videos listed in the resource section. Instead, the stories and concepts presented in this book are meant to help you assess your group’s approach to “friendmaking” and organizational management, both of which are key to raising funds.

Building Your Nest Egg: *Nature’s Model*

A bird building its nest provides a wonderful analogy for Friends groups who likewise want to “build their nest eggs.” Let’s consider for a moment what it takes for a bird to build her nest and fill it with eggs:

First, she has a ***Plan***:

She knows what she’s building—she has a design in mind and knows what the finished product will look like.

The nest is made up of a ***variety of materials***:

Often we find a mixture of building materials including grass, mud, feathers, yarn, etc.

The materials are ***intertwined*** and the nest is ***solid***:

The materials are woven or fused together to create a strong foundation. The nest won’t easily fall apart and is well secured to its supporting branches or eaves.

1. “Friends” is used throughout this book as a general term for a grassroots group whose primary mission is to support a National Wildlife Refuge (e.g., Friends groups, Cooperating and Interpretive Associations, Audubon Refuge Keepers, and others).

The eggs are laid after a period of ***courtship***:

The male and female bird build a relationship that leads to promulgation of their species.

The eggs and young are ***tended with care***:

The eggs and chicks are kept warm and well fed, and the nest is fiercely protected.

Putting Nature's Model to Work:

Likewise, Friends groups must have a vision and process in mind to build their own "nest eggs." Here are some of the key points:

Your group needs a ***plan***:

For the bird, the nest is not the goal in and of itself. Similarly for your group, raising money is not the goal, it's what you do with the money that's important. You'll need to clearly understand and communicate why you need funds, what you hope to achieve, and what success will look like (i.e., the finished product).

Your funds must come from a ***variety of sources***:

By diversifying your sources of funds, you build stability for your group. Consider following the rule that no more than thirty percent (30%) of funds should come from one source (e.g., individual, foundation, corporation). If any one source dries up, you'll still have many others from which to draw, and you won't have to worry about your group dissolving because your primary source of funds has disappeared.

The organization must be ***solid***, which can come through carefully ***coordinating and integrating*** your activities:

Consider that the "nesting materials" for your organization include such things as a good management structure, programs, relationships, volunteers, and public relations. All these "materials" come together to create an organization that has credibility, visibility and strength. As a result, the organization will attract more members and donors, each of whom will bring new talents and opportunities to the group. Together, this mix of people, plans, funds, and management, creates a solid organization worthy of ongoing support.

Relationships are critical to success:

Fundraising is "friend" raising. The more friends you have (members, community partners, legislators, businesses, etc.), the more resources you'll have to support your goals. Your friends bring their talents, funds and their own relationships to the group. They help to expand your sphere of influence and can gain support for your group from places you'd never imagine.

Finally, you'll want to *tend the organization with care*:

Donors want to know that they are giving to a group that can successfully accomplish its goals and not squander their money. Sound financial practices, planning and careful implementation of programs, attention to details, nurturing relationships—are all important steps in showing your members and donors that the organization is worthy of their continued support.

The following sections build on this model and offer basic tools that you can use to develop your fundraising strategies. Remember, positioning your group to succeed at fundraising will take time. It's a process of planning, organizational development, and relationship building. The stories and discussion that follow will help you get started. If you want more detailed information on a particular subject, the resource section lists a number of excellent books and videos that your group will find helpful.



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In nature, courtship leads to perpetuation of the species. Similarly, perpetuating your Friends group is all about relationship building. You can't succeed at fundraising or at accomplishing your goals without strong relationships. Indeed, fundraising isn't really about raising funds at all, it's about making *friends*. The more friends you have, the more secure your organization will be.

This section lays the framework for why people support organizations and offers suggestions on how your group can begin building and expanding its friendships.

Friendraising (“Courtship”)

Relationships Are Key:

The most important key to fundraising success is relationship building. To be successful fundraisers, your group needs to be in the business of making and keeping friends (“fundraising is friendraising”). The more friends you have, the more money you’ll have, because your friends understand personally the value of your group and support it through their donations. Understanding why people give will help you find ways to match your group’s needs with those of your donors and begin developing the relationships you need to build your nest egg.

Why do people give?

People give for many reasons, some are altruistic, others economic. Others may give simply because they feel an obligation to return some of their good fortune to their communities. Consider the following:¹

- ❑ **Because they are asked** — “The number one reason people give away their money is simple: *somebody asked*. If it’s someone they know and trust—their sister-in-law, parish priest, or car mechanic—so much the better. All fundraising, including grantwriting, begins with the simple act of one person asking another for money (Robinson, 1996, p. 13).”
- ❑ **Values and beliefs** — The organization represents issues that are consistent with the values and beliefs of the individual. As individuals they have little power to affect change, but as members of an organization they can make a difference.
- ❑ **Sense of community or altruism** — They care about the issue, believe in the group, or agree with the group’s vision.
- ❑ **Sense of personal worth or feeling good** — Giving makes them feel good because the group expresses their personal ideals and helps them to reinforce their image of themselves.
- ❑ **Posterity** — They want to leave something of themselves to benefit future generations.
- ❑ **Sheer fun and pleasure** — They enjoy the group and want to see it succeed.
- ❑ **Pure exchange** — They join for the newsletter or other tangible items, such as a tote bag or bumper sticker.
- ❑ **For the tax credit** — They choose to make a donation to a nonprofit group of their choice rather than pay more taxes on their income.

1. Adapted from Klein (1996), Robinson (1996), and Seltzer (1987).

- ❑ **Out of a sense of guilt** — Some people feel guilty about how much they have or how little service they have done in their life and giving helps relieve some of that guilt.

Corporations and foundations are not unlike individuals in their giving. They give to groups whose accomplishments and plans correspond with their own vision and goals. By building personal relationships with the *people* who are involved with these organizations, your group will be in a better position to receive funding awards.

Making and keeping friends:

Regardless of their reason for giving, individuals choose to give to some groups and not others. Your challenge is to match your needs with the interests of your prospective donors so that your group will be the one to receive the donation and not some other group. Here are some ways you can increase your chances of attracting donors to your organization.

- ❑ **Show Clarity of Purpose** – You'll be more likely to attract members and donors to your group if you can communicate a clear vision. If your message is muddled it will be harder for people to identify with your group.
- ❑ **Build Credibility** – Have a clear plan of action and do what you say you're going to do. Be fiscally responsible. People are more comfortable giving to a group they believe will handle their donations with care.
- ❑ **Be Visible** – Build a public relations plan into all of your activities. The more press you get (e.g., via the news, cable, radio, and your own newsletters), the more people will begin to recognize your group, become members, and make donations.
- ❑ **Address the Needs of the Donor (offer them something of value)** – Subscribe to "WII-FM" ("What's in it for me?"). Think about what you have to offer potential donors. Consider how you can make people feel good about being part of your organization (e.g., fun socials, volunteer opportunities, programs). Offer something that will involve individuals on a personal level.
- ❑ **Match Interests** – Consider how you might match your organizational needs with those of your potential partners, such as businesses and corporations. What do you have that they might want (e.g., volunteer opportunities for their employees) and what do they have that you could use (e.g., expertise, equipment, free labor).
- ❑ **Have FUN!** – People want to join a group where they can make new friends and have fun. Even though your group is focused on a serious issue (i.e., protecting and perpetuating refuge lands), you can still have lots of fun with your programs member outings, and volunteer activities.

Many Friends groups have learned the value of building strong relationships. These are important not only to fundraising, but to all aspects of the organization, from working well as a board and with refuge staff, to attracting volunteers and building community support. The more friends you have, the easier it will be to accomplish your mission.

The two Friends stories in this section show just how important relationships can be—from a chance meeting to careful planning, the experiences of these groups is just a sampling of what’s possible when you focus your group’s energies on making personal friendships. Other stories throughout this book exemplify the same principle—individuals make all the difference.

Friends/Refuge Relationship is Key to Fundraising Success

Building strong relationships with refuge personnel as important to fundraising as the relationships groups develop with potential donors. Remember that project and program implementation will be done as a joint effort, so everyone will want to work together toward the same goals. Refuge personnel can also play a key role in helping groups make important connections

in the community and beyond. Taking time to build a mutually supportive relationship will help the group and refuge personnel meet their goals and will prove key to fundraising success. See *Taking Flight* (1997) for a relationship building model that works (a copy of the “Guiding Principles for the Friends/ US Fish and Wildlife Relationship” is provided in the Appendices).

The Power of Saying “Thank You!”

“

Always, always, always thank everyone for every type of donation. Even if you have to stay up all night writing these notes, do it!”

— Flanagan, 1995, p. 99

”

One of the most important ways to nurture your relationships with your donors is to acknowledge their contributions with a simple “thank you.” Saying “thank you” is a great way to make your donors feel valued and appreciated. People like to be thanked (even if they tell you it’s not necessary!), and are likely to give, and to give more, the next time they are asked.

Saying thank you is too important to leave to chance, so you'll want to ensure that you have one or more people in place whose job it is to write notes (or even make telephone calls) for each contribution. A thank you note should be hand-written to each and every donor, no matter how large or small their contribution. Klein (1996) notes that thank you notes should go out within two days of receipt of the donation, a week at the outside, and should be signed, if possible, by someone who knows the donor (p. 170).

In addition to personal thank you notes, you can recognize your donors publicly in news articles, letters to the editor, newsletters and other mailings to members or with plaques or name plates attached to purchases made with donations. Be sure to check with your donors about recognition first. Some folks may prefer *not* to be acknowledged publicly.

You can also show your thanks to major donors² by keeping in touch with them several times each year. Some ideas include:

- ❑ Write a personal note on reports or newsletters;
- ❑ Send birthday or holiday greetings;³
- ❑ Send copies of news releases or articles with an added personal note that says something like: "Your contribution helped make this possible!"

“

Overall, experience shows that, all else being equal, when you thank donors you keep them and when you don't you lose them.

— Klein, 1996, p. 170

”

If you are launching a fundraising campaign of any sort—from a membership drive to a capital campaign—you'll want to make saying "thank you" an integral component of your campaign. Remember, as Flanagan (1995) writes: "Thank-you notes make the donor feel appreciated, and she or he will remember that the next time you ask for something (p. 100)."

2. The definition of a major donor will differ for each group. For smaller, start-up groups, \$50 may be considered a major donation, while more mature and well-funded groups may set their major donor baseline at \$500 or \$1,000.

3. Take care with holiday greetings: know your donor's preferences or send generic cards.



Cultivating Relationships Proves Key to Success in Adversarial Climate

Friends and Volunteers of Refuges (FAVOR), Florida

At the outset, Harold and Susan Nugent, founders of Friends and Volunteers of Refuges (FAVOR), realized that their group would need to build positive community relations if they were to succeed. This was a huge challenge because controversies between developers and conservationists over the endangered Key deer on Key Deer NWR had been one of many polarizing events in the community (which stretches over 150 miles along the length of the Keys).

To gain support, the group needed to be viewed as a positive force in the community. They needed to get beyond the adversarial climate and make lots of friends who would support their goals. To do this, they took a strategic approach to organizing that included three main components: choose the right board members; stay focused on their goals; and choose highly visible projects.

❑ **Choose the right board members:**

As they sought board members, they recognized the need to be careful who they partnered with—they needed to associate with the “right” folks (people who were respected and would not be viewed as adversarial). Friends and former Refuge Manager, Barry Stieglitz, worked together to select people who would best fit the needs of the organization, weeding out folks who had potential conflicts. Not only did this process help find the right board members, it set the stage for the group’s working relationship with the refuge and the community.

❑ **Stay focused on their goals:**

The group developed four goals focused on: education, advocacy, volunteerism, and fundraising. Objectives for each goal were developed. Each board member focuses on two of these and all activities have to be consistent with the goals. In addition, they organized their budget around these four categories, which creates a budgeting process that can be understood and easily managed by all board members. In fact, Harold recommends, “If a budget item doesn’t fit your goals, you probably should let someone else do it.”

Being focused has helped the group enormously. FAVOR can clearly communicate its goals and accomplishments to members and the community. They are prepared to respond quickly when opportunities present themselves.

❑ **Choose highly visible projects:**

FAVOR made a conscious decision to focus on activities that would be highly visible. For example, they adopted a road to clean, which gets their name on a road sign and attention when they are out cleaning the road. Other activities have included speaking engagements on popular subjects, such as crocodiles and alligators, creating a butterfly meadow, and designing a FAVOR license plate.

“

Piggyback onto other group’s events to get exposure. Get your name out. The more you associate with others, the better.”

— Susan Nugent, FAVOR

”

FAVOR’s strategy has helped in their fundraising efforts:

By creating a nonadversarial board committed to building relationships, sticking to a clear plan, and being visible, the group has built credibility and recognition in their community. This approach has had huge payoffs: volunteers are stepping forward, former skeptics are now partnering with FAVOR, and donations of funds and services are beginning to roll in. For example:

- ❑ **The owners of a rather expensive tour boat donated a day-long trip** that FAVOR used to plan their refuge birthday celebration. *Fifty people* participated! The boat’s owners, who are friendly to environmental groups, are also willing to help with a future fundraiser.
- ❑ **Thirty volunteers came forward to help establish a butterfly meadow** after Harold gave a speech at a workshop held by Discovery Florida Keys.
- ❑ **FAVOR has established partnerships with boat captains who had formerly been both skeptical and contentious.** These partnerships have led to joint activities, such as back country clean-ups that use donated boats for access and FAVOR volunteers to pick up trash.
- ❑ **Two major donors stepped forward in the group’s first year.** One \$1,000 donor stated, “If you give us a budget, we’ll give you money.” FAVOR was prepared to respond, making it easy for the donor to give.

The experience of Friends and Volunteers of Refuges clearly shows how strategic organizational development sets the stage for successful fundraising. By proving they had something valuable to offer not only the refuge, but the community, FAVOR is positioned to raise more than money—they are raising lifelong friends and supporters of the Florida Key National Wildlife Refuges.



Making Connections Spells Success

Friends of Anahuac Refuge, Texas



In a remote Texas community with a population of only 1,900, the ability of a Friends group to thrive seems difficult, if not impossible. Yet, Friends of Anahuac Refuge has experienced phenomenal success in just four short years since the group was established in December, 1996. During this period, they have:

- ❑ Developed a highly successful environmental education program for area schools.
- ❑ Established a reading program in local schools.
- ❑ Offered regular events and programs.
- ❑ Donated thousands of volunteer hours to the refuge, including a team of “greeters” who introduce the refuge to visitors.
- ❑ Become a visible presence in the community and garnered tremendous support, both financial and personal.

Grady Skillern, Friends President, credits much of the group’s success to their relationship with refuge staff: Friends members are treated like staff and they have been through all the training and are included in staff meetings. Friends members have become trusted friends and they feel they are taken seriously by the staff.

This Friends/Refuge relationship proved critical to a surprise corporate donation made by an oil company. While Grady notes that their group’s experience was a bit of a fluke, the story shows how critical building individual relationships are to organizational and fundraising success. It also underscores how important refuge personnel are to the success of Friends groups—they play a key role in helping groups make the connections they need to succeed.

Friends of Anahuac Refuge Receive \$50,000 Corporate Donation:

About eight months after the Friends were operational, oil exploration was done on the refuge. Manager Andy Loranger had the foresight to invite members of the Friends to a meeting between the refuge and the companies doing the work. The Friends provided information about their organization and gave the companies an opportunity to offer financial assistance. Grady notes that “They knew they had no leverage with these companies, but the Friends’ speakers were eloquent and managed to get their message across.”

The oil exploration created damages for which the refuge ultimately sought repair. As chance would have it, the Friends had a golden opportunity to speak directly with the geophysicist in charge of the exploration project during a local town festival. He stopped by the group's booth during the event, and the group's members seized the opportunity to voice their concerns and discuss the ramifications for refuge wildlife.

This personal connection proved fortuitous for the Friends. When the refuge submitted their request for the damages to be repaired, the company asked what the Friends needed as well. They donated \$50,000 to the Friends, as Grady notes, "to make up for some of the damages they knew they had caused, but which they couldn't repair." In return, the Friends have recognized the company's donation on some refuge signs.

This story underscores some key principles in corporate fundraising:

- ❑ **Corporations donate funds in situations where it will help their image, bring in profits, or benefit their employees in some way.** In this situation, the company chose to donate funds to the Friends because they were interested in maintaining an image as good neighbors who were concerned about the environment.
- ❑ **Like other sectors, corporations don't give to "organizations," they give to people.** The group was a known entity to the corporation from their early meetings with the refuge staff. They had also made an important personal contact with the company's geophysicist when he visited their booth. These contacts made it possible for the corporation to donate to *people* they knew personally.

Building on Success:

Friends of Anahuac Refuge used a portion of the \$50,000 on an environmental education program that has helped the group establish strong community relations. In its first year, the program brought nearly 1,000 students to the refuge, involved volunteers who had never before set foot on the refuge, and engaged both teachers and parents.

The environmental education program was spearheaded by Grady's wife, Lu Skillern, who modeled it on a similar program offered at a Houston area nature center. It is designed for all schools in the county, grades K through 5, and includes an outdoor school field trip that uses volunteer teachers. Local teachers were involved in the program's design and all who have participated have given it rave reviews and are anxious to return for more classes in years to come.

The program has received a tremendous amount of publicity in the local newspapers. Indeed, the Friends have developed such good relations with the press that, as Grady notes, "We can now write anything we want and get it into the local papers because the editors love to see our stories!"

The Friends of Anahuac NWR are finding that success truly breeds success. Their many relationships and enthusiastic support has led to more donations. For example, one bank recently sponsored a full set of classroom kits and donated a repos-

sessed trailer that the group refurbished and now uses for their supplies. In both of these situations, the work of the Friends was well-known and members had established personal contacts that led to the donations.

So, in this small town of 1,900 people, relationships—between the refuge staff and the Friends and the community—have made the difference. While the group will always struggle to build membership because of its limited population base, it has found a local recipe that works for being a successful, well-supported organization. This group's experience underscores an important fundraising principle: *people give to people.*





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Before contributing funds, potential donors must first believe that an organization can accomplish what it says it will and that the group will be fiscally responsible. A group will be viewed as a safe investment when it has a good plan, sound financial procedures, a history of responsible ventures, and a track record of accomplishments.

This section discusses how Friends groups can develop plans and procedures that will create a solid organization capable of meeting donor expectations. These steps will set the stage for your group's ability to succeed at fundraising.

Organizing a Friends Group for Fundraising Success

One of the first steps a Friends group must take to succeed in raising funds is to create an organization that is serious about its future. Board members must recognize that they are managing a business, albeit a nonprofit business, but one that is accountable to its membership and donors. In order to maintain support, the group must be able to handle funds responsibly and show annual accomplishments. Running the organization in a haphazard fashion will ultimately lead to failure, so it makes sense to do it right from the start. How you manage the day-to-day operations of your organization will play a significant role in building credibility and raising funds. The following are a few considerations:

People:

You'll need enough people involved to ensure that you can achieve your goals, meet your obligations, and spend your donors' money wisely and responsibly. Consider who will keep your books, write checks, make deposits, print and review reports, and make these available to the board. Decide who will oversee all your money matters to make sure the systems are working and the information is being recorded and reported properly. Simply assuming that your volunteer treasurer will do all these things is not enough.

Beyond managing the organization's administrative, fiscal and legal responsibilities, you'll also need volunteers who can:

- Ask for donations and ensure that all the funds needed are raised;
- Write thank you notes;
- Run your projects or programs;
- Manage your public relations and outreach programs.

Equipment and Information Management:

In addition to having enough people to do the work, you'll need systems and equipment in place to allow you to manage your money, including: bank accounts, computers, accounting and bookkeeping systems, filing cabinets, and storage space. You'll need to decide on a computer and software systems for managing your financial data. You'll want a system that will allow you to keep track of your members and donors, including such information as their contribution histories, preferences, and who in the group knows them. As you research foundations and write grants, you'll want a good tracking and information system on the work you've done.

Things to Consider in Organizing a Friends Group

George and Dorothy Hoffmann, organizers of Friends of the Upper Mississippi River Refuges, have been helping start-up groups in their area for some time now. They developed the following list of things to consider in organizing a group. Each item contributes toward establishing a sound organization that is prepared to receive financial support. Review these items to identify any that need to be developed or solidified before you begin raising funds.

ELECTION OF OFFICERS — to provide leadership, document meetings, handle funds

RATIFICATION OF BOARD MEMBERS — who will serve on the board

MEETING DATES AND LOCATIONS

OFFICIAL NAME — what the group will be called

REGISTERED OFFICE — what the address of the Friends will be

BANK DESIGNATION — for future funding

MISSION STATEMENT AND GOALS of the Friends group

DUES STRUCTURE — what you will charge for becoming a member

BY-LAWS — how the group will be governed

COMMITTEES — how the group will be organized

TASKS AND ASSIGNMENTS — what each board member will do

ARTICLES OF INCORPORATION — registering with the state as a nonprofit

Application for TAX EXEMPT STATUS (501(c)(3)) from IRS

Cooperative Agreement with USFWS

OPERATIONS MANUAL — covering the functions of the Friends group

WEB SITE

LOGO

STATIONERY

MEMBERSHIP GROWTH PLANNING — brochure, application, membership card

NEWSLETTER

PROJECTS

BUDGET

SALES

GRANTS

STRATEGIC PLANNING for the second year

Good systems (equipment and procedures) will help you maintain your group's history (you won't have to reinvent the wheel when key board members or the fundraising manager move on) and will make your jobs easier as you seek key information. In addition, having a central location where you do your work (i.e., at the refuge), will make it easier for you to manage and store information.

Financial Management:

One of the first steps in creating an organization is deciding how you'll handle the money. From the start, you need foolproof systems for banking, spending, recording and reporting your finances. These systems become increasingly important as you raise more funds and seek larger contributions, because your donors will want to know that they are contributing to an organization that can handle their money responsibly. The systems are also necessary for accurate reporting to the IRS. To succeed, your group will need solid financial systems in place that are easy to use and understand (see Appendix B for a copy of Friends of Upper Mississippi River Refuges Finance Procedures). In *Managing a Nonprofit Organization*, Thomas Wolf (1990) suggests a number of basics to help you accomplish this task (p. 139-191):

- ❑ Decide on a fiscal year¹ that will allow for meaningful financial comparisons between one year's activities and the next.
- ❑ Develop a budgeting system that will allow you to analyze the comparative costs of programs and activities.
- ❑ Develop a cash reserve fund.
- ❑ Develop a budget process that allows for input of board members and is conservative enough to prevent unintended deficits at the end of the year.
- ❑ Plan multiyear budgets to allow for long-range planning.
- ❑ Create a chart of accounts that will provide sufficient detail to allow for necessary financial analysis of performance.
- ❑ Decide on a regular review system to analyze your cash flow.
- ❑ Decide on a method of accounting that will be most appropriate for your needs (i.e., cash basis, modified cash basis, or accrual).
- ❑ Develop systems that allow you to have a properly prepared balance sheet and income statement that together will accurately report your organization's net worth and fiscal year's financial activity.

1. Reviewers Frank and Arlene Wolff suggest that, especially for Cooperating Associations, it is highly desirable to coincide your group's fiscal year with the refuge's fiscal year.

- ❑ Develop a regular procedure for monitoring income and expenditures and amending your annual budget.
- ❑ Establish proper controls over check writing, dealing with incoming money, and handling cash in your organization. Protect the organization against financial loss through bonding.
- ❑ Establish systems so that you can file required financial forms and provide necessary forms to employees and independent contractors in a timely manner.

Probably the best way to meet your needs is to retain the services of a non-profit accountant and/or lawyer who can help you set up these systems. Many groups have found that, as grassroots nonprofit organizations, they can get these services for free or at a discount (even better, bring someone with these skills onto your board!).

Remember that while you may have a financial manager, every person on your board is responsible for the sound fiscal management of the organization. Everyone needs to understand your group's accounting systems, be able to read its financial statements, and be able to readily assess the group's financial status. Plan to get everyone on the board the training they need to meet this responsibility.

Successful fundraising depends, in part, upon your group's ability to show that you can manage the organization's finances well. Who wants to give money to a group that will waste or manage it poorly? Dorothy Hoffmann suggests that you "Take the time to do it right the first time." Setting up fool-proof systems up front will save you a great deal of time and headaches down the road.



Creating a Solid Organization for a Solid Future

Friends of the Upper Mississippi River Refuges, Wisconsin

The Upper Mississippi River National Fish and Wildlife Refuge presents a unique challenge to citizens building a Friends group—it is 270 miles long and covers 200,000 acres in four states. Because of the huge distances and number of communities involved, the typical approaches used by Friends groups to gain membership and get publicity are not practical for the Friends of the Upper Mississippi River Refuges. Undaunted, this group has grown to 200 members in two short years. They have established a solid organization, become important refuge advocates, are providing consultation to other start-up groups in the area, and have planned an ambitious future.

Organizers George and Dorothy Hoffmann decided to “do it right” from the start. They chose to create a professional organization that was capable of meeting the challenges of the future. Their approach to making friends, positioning themselves for raising funds, and creating a stable organization includes the following:

- ❑ **Establish standard operating procedures** for managing funds, committees, board responsibilities, organizing chapters and the like. These procedures were compiled into a comprehensive operating manual that the group uses as its guide for organizational management (see the Appendix B for the group’s finance procedures).
- ❑ **Establish an identity for the group and the refuge.** They did this by creating a logo and using it: on stationary, stickers, T-shirts, and coffee cups. This step gave the group legitimacy and visibility.
- ❑ **Create a membership dues structure that would provide sufficient operating funds.** The group recognized that it would have difficulty gaining members because it has no focal point, such as a Visitor Center, out of which to work. In addition, the refuge itself is not well known. For these reasons, they chose a dues structure that started at \$25 and went up from there. This dues structure would bring in sufficient funds to allow the group to manage its basic operations.
- ❑ **Send a direct mail package to establish a membership.** The mailing went to a “hot list” of people who had shown support for the refuge, either by volunteering or who were known to the refuge in one way or another. The response to this mailing was very high (70% or better).² These members continue to have a renewal rate of more than 90%.

2. It is important to keep in mind that this is the experience of one group and response rates to a direct mail appeal will differ for each group. Indeed, reviewer Cecily Harris notes: “These are extraordinary returns. Most groups of any type don’t achieve this rate of return. For a hot list, a 10% return is outstanding.”

- ❑ **Use the newsletter to keep members interested.** Since news coverage over such a broad area is hard to get, the Friends use their newsletter as an important tool to keep members informed of their activities. It also serves as a regular communications tool with other groups, local political contacts, and congressional representatives.
- ❑ **Select Board members that have direct connections with each refuge community.** The group works through its local chapters, giving it both a local and refuge-wide identity. Board members are selected based on their connections with other local groups and prominence in their communities. Through their connections, board members are able to help create new mailing lists for member recruitment.
- ❑ **Think and plan strategically.** The group conducted a strategic planning session in its second year. They recognized early on that they needed a strategic plan, but no one on the board had experience in this area. They applied for and were awarded a \$4,300 grant to develop a plan. One goal that resulted from their planning effort was to have a \$100,000 annual budget within three years. They are now working on a detailed fundraising plan to allow them to achieve this goal.
- ❑ **Create an endowment.** Dorothy notes, “The endowment is the backbone of the organization.” These funds will give the organization the stability it needs over the long run and it provides credibility to the group as well. The Friends plan to spend interest earnings, but the actual endowment amount won’t be touched. The endowment will grow with gifts (such as for anniversary or birthday celebration), memorials and bequests. George says, endowment donations are “gifts that keeps on giving.”

By taking time to plan their organization, the group is setting the stage for a financially stable future. Even though they were a start-up group, they recognized the need to create solid systems that would serve them long into the future. By creating a set of procedures up front, they are prepared to manage the needs of a growing organization.

As Friends of Upper Mississippi River Refuges builds its nest egg, its donors will feel confident that the group is handling their contributions responsibly. No doubt, donations will continue to roll in and the group will easily achieve its \$100,000 annual budget goal in three years.



Board Commitment is Key:

Board members must be willing to help raise funds, including making a financial contribution to the best of their ability. Even large nonprofit organizations with paid staff depend upon board members to assist in fundraising. Board members provide leadership, vision, financial support, and make the important connections needed to raise funds.

Some members may feel uncomfortable about fundraising. They feel inexperienced and don't like the idea of asking anyone for contributions. However, if your board is unwilling to participate in fundraising and make their own financial contributions, you'll have to question why anyone else would find the group worthy of a donation. To succeed at fundraising, you'll need to find ways to get over this hurdle—Joan Flanagan (1995) suggests a number of ideas for getting the board involved (p. 37):

- ❑ Choose events and fundraising techniques that board members *like* to do and give them ownership.
- ❑ Make it fun.
- ❑ Discuss your fundraising experiences as a group and you'll discover you already have a great deal of experience (e.g., worked on special events, made weekly contributions or dues to local churches, clubs and associations). These experiences will help build board member confidence and interest in fundraising.
- ❑ Earmark the first fundraising campaign funds for something the board really wants.

The more experienced board members get with each fundraising activity, the easier it will be to get them more involved. Small successes will get everyone excited and increase their willingness to do more. The Friends of Blackwater story that accompanies this chapter shows how important board commitment and participation is to a group's fundraising success.

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The reason that board members must take a leadership role in fundraising is simple: they own the organization. They are responsible for the well-being of the organization and for its successes. Furthermore, their supporters and potential supporters see board members as the people most committed and dedicated to the organization.

— Klein, 1996, p. 44

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The Advisory Board:

Some groups consider establishing an “advisory board” as a way to increase their ability to raise funds. In fact, the “Ding” Darling Wildlife Society decided that this was a necessary step in their ability to succeed at their capital campaign (“Keys To Building A Successful Capital Campaign” on page 70). However, an advisory board should not be seen as a panacea to your fundraising woes. Just setting up an advisory board isn’t enough: you need to be specific on what you want the members of the board to do and a clear commitment from each member to follow through on their responsibilities.

Klein (1996) suggests that advisory boards are helpful to fundraising under the following conditions (p. 54-55):

- ❑ **Your board of directors is already doing all the fundraising it can, but this isn’t enough.** In this case, the advisory board can supplement the work being done by the board.
- ❑ **Your group has a specific, time-limited project that needs its own funding.** The “Ding” Darling Wildlife Society’s capital campaign to raise funds for an education center is a good example.
- ❑ **You need help establishing a small business (i.e., your bookstore) or running a special event.**
- ❑ **Your group needs help raising funds from a particular sector, such as businesses, corporations, or clubs.** The advisory board would be made up of representatives from these sectors and would raise funds from their peers.

Before you decide to set up an advisory board, consider carefully why you think one is needed and what you expect this board to accomplish—do your needs fit any of the conditions listed above? If not, an advisory board may not be the right choice for your group. If you decide to establish an advisory board, you’ll need to carefully plan how it will interact with your Board of Directors. You’ll need to decide what you expect from the advisory board members (what role will they fill?) and how you will maintain accountability.



Fundraising Involves the Whole Board

Friends of Blackwater NWR, Maryland

Author's note: Many thanks to Frank and Arlene Wolff for preparing the material for this story, and Peggy Tillier for telling us of her fundraising experience.

One key aspect of successful fundraising is that all members of the Board of Directors needs to be involved in the effort. Friends of Blackwater has taken this idea to heart. The group got their start in 1987 as a Cooperating Association and over time they recognized that income from the sales outlet had its limits. In their Winter 1996 newsletter, they wrote:

While [the Association] has been successful in receiving a limited number of grants from non-profit organizations and corporations it realizes that there is a vast, largely untapped potential source of funding for desirable Refuge programs. To that end the Board is in the process of establishing a Fund-Raising Committee which has been charged with the coordination of seeking and finding viable alternative sources of funds to supplement the amounts earned from the sales outlets. This will include beefing up our efforts to further increase individual and business memberships and sponsorships as well as seeking support for helping to defray the costs of specific projects. Expansion of the gifts "in honor" and "in memory of" efforts will also be examined.

In a presentation given at a National Wildlife Refuge Association Friends Workshop in the Spring of 1998, the group showed how, through their committees, each Board member contributes toward the group's fundraising effort. Blackwater's model shows how your board members can become fundraisers too, even if they insist (and they will!) that they don't know anything about the subject. Following are the areas on which Blackwater's board focused:

Membership:

Membership is a key element to fundraising for the group. Blackwater's Membership Committee has recognized that membership brings a regular stream of income and has examined ways they could maximize on fundraising through this avenue including: raising the amounts to join, establishing "corporate" and life memberships; offering more premiums for various levels of membership; and starting seniors discounts.

Donations:

The group has sought for various issues of the newsletter. They also have had donations "arrive without our asking" such as a shot-gun, bird art prints, hand-made jew-

elry, and bird feeders. They have a donation box in the visitor center and have established a memorial fund. Board members are involved in managing these donations and putting the items and funds to good use.

Bookstore Sales:

The sales outlet is clearly a mainstay for this group. Members of the Bookstore Committee are continually assessing ways they can maximize sales and draw more people to the store. Ideas beyond their regular sales have included: special event sales days (e.g., open houses and holidays); special project sales (e.g., national distributor for US Fish and Wildlife Service's "Wild Things" T-shirts); developing a regular program of adding new items and dropping older items; and properly training volunteers to enhance sales.

Community Outreach Activities:

Board members are involved in a number of outreach activities aimed at increasing public awareness of the Refuge, recruiting new volunteers and/or Friends members, and building visibility for the group. For example, they have formed a speakers bureau. They also staff a mobile exhibit at various community events, festivals, industrial shows, conservation organization events, and are able to raise funds by adding new members and selling products from their bookstore.

Grants:

Some Board members are involved in seeking grant money. They have focused on learning about local, regional and national sources and developed expertise in writing grant applications.

Special Events and Other Activities:

Board members have conducted donation drawings, silent auctions, joint fund-raising activities (e.g., Friends and local 4-H Clubs), published their own unique leaflets, monograms and videos (e.g., History of the Refuge, 10th Anniversary Report of Accomplishments, Refuge Education Manual, Refuge Introductory Video).

A First Experience:

Friends of Blackwater Board members are also learning how to ask for donations from individuals. From their experience, they recommend: "Don't be afraid to ask businesses (large and small) and individuals and community organizations to give. You'd be surprised how many will, if only asked. Be prepared to accept something other than cash."

Board member, Peggy Tillier, tells of her first experience asking for money, something she had never done before.

I went to the Friends' bank in jeans and sneakers, thinking I would simply gather information. I asked for the name of whom I should contact to request funds. The man I spoke with (who didn't know me) took me directly to the right part of the building and connected me with the right person. I told this person that we were seeking corporate sponsorship for our newsletter and he asked me how much money we wanted. I told him our yearly expense was about \$4,000 and that we'd be delighted with all, or any portion of, this amount. He immediately said that he'd give us \$250, to which I said, "That's a lovely starting figure." This bank has since paid for the printing of raffle tickets and made another contribution toward the newsletter. Another bank made a similar commitment and called to ask if we would accept the same amount this year—would we ever!

Peggy notes how empowered she felt from this first experience. She reminds us that banks are required to put money back into their communities, so they are a good resource for funds.

Since Peggy's first experience, the bank has paid for other group needs. She notes that it's important to offer something of value (e.g., a public relations opportunity) to corporate donors. "Tell them they'll get their name in print." Friends of Blackwater also nurtures their sponsors by sending invitations to their open houses. She notes, "this does work—they do come! And, all we're doing is staying in touch, [our sponsors] are not always seeing an extended hand." Recently, the group recognized individual and business donors at an evening "business after hours" reception. Plaques were presented to the donors in appreciation of their efforts and the event received excellent publicity in the local media.

Friends of Blackwater Board members clearly feel empowered by their fundraising successes. They are each contributing something of value to the group and are learning new skills. Over time, Board members are gaining significant fundraising experience that they will apply to bigger challenges, such as a capital campaign for a visitor center.



Planning:

Another important step to getting your house in order is developing a plan for the future. With a good plan, your board will be clear on its direction and be able to communicate the group's needs with clarity. Like a bird building its nest, you'll know what you expect to accomplish and how you'll make it happen.

Planning can be particularly difficult for many members of Friends groups. Board members are action-oriented. They hate to sit in meetings discussing the future and would much rather be running programs, sponsoring events, meeting with legislators, or simply volunteering for a refuge work project.

Planning is a Collaborative Process:

It almost goes without saying that it's important to develop your plans in collaboration with your refuge manager and staff. These folks play a key role in your group's ability to accomplish its objectives. Creating a mutually shared vision will ensure that everyone has a vested interest in ensuring that the group succeeds.

Remember that each refuge has its own set of plans and priorities. Staff follow a variety of regulations, policies, and guidelines that dictate how they conduct refuge business. Their timelines for meeting objectives are likely to be different from your group's timeline—even seasoned Friends members and refuge staff sometimes get frustrated with how slow the government works.

As you begin planning, ask your manager to help convene a combined meeting that allows everyone on the board and refuge staff to participate. Brainstorm ideas and talk about what's realistic, what's not, and decide together what can be accomplished. You are likely to find areas that will require a great deal of staff involvement (e.g., a festival), and others that your board will tackle on its own (e.g., creating a finance committee). As you consider the details of your fundraising plan, discuss how they will be implemented and what help you'll need from the staff. Ask them to identify potential challenges in helping you meet your goals and then take these into account as you finalize your plans.

As part of the process, be sure to assign someone to take notes and send a summary to all participants. As you finalize your plans, provide a written copy for your board members and refuge personnel for review and reference.

The relationship between refuge personnel and the Friends group is critical to fundraising success. By working together, Friends members and refuge personnel can ensure that the group's "map to the future" complements the refuge's "map." In addition, you'll understand each other's strengths and limitations, which will make it easier to decide how you'll accomplish your goals.

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In the absence of more realistic planning, most voluntary agencies are governed, and badly so, by the bright idea. [Someone] gets a bright idea about what should be done, and off the agency zags. The organization is almost defenseless against the bright idea because it sounds so good or might help so many people, but there is no mechanism to put it in competition with all the other things that might be done.

— O’Connell, 1993, p. 79.

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But, there are some good reasons for taking the time to create your plans. Consider this, would you make a donation to someone without knowing who they are and what they plan to do with your hard earned money? Let’s say the person is very passionate and their cause sounds just and worthy. Maybe you could be convinced to give them five or ten dollars, but would you give them \$50 or \$100?

In order to give more money, you’d probably want to know a lot more about the person, group and cause to which you are giving. Are they credible? Can they accomplish what they say they will? Have they done anything worthwhile in the past? Do they have a vision for the future? Are they financially sound? These are the kinds of questions a donor is likely to ask about your group.

Because people give to organizations that produce results, your group’s ability to define its goals and then show clear accomplishments is critical to attracting donations. Planning will help you identify your shared vision, create workable strategies to meet your goals, set priorities, and determine how much money you’ll need to raise and where it will come from. Good plans will give your group credibility and increase your chances of raising the funds you need to accomplish your goals.

Who Benefits From Your Group’s Plans?

There are lots of benefits to having good plans. Here are some examples:

- ❑ **The Board** benefits because plans provide a map to the future (you’ll be working together to build the *same* “nest”). With good working plans, the Board has a clear sense of direction and will no longer waste precious meeting time talking in circles trying to decide what ideas would be good to implement.
- ❑ **The membership** benefits because clear plans help them understand their organization better. Plans give relevance to a member’s volunteer time, financial contributions, and general support.

A Simple Approach To Planning

O'Connell (1993) suggests that the problem with planning is that it always seems so complicated. He recommends a planning retreat to develop your annual plan. Here's a list of agenda topics he suggests for the retreat (p. 80-85):

- Review the group's mission.
- Review current resources.
- What was accomplished in the past twelve months
- What didn't get done?
- Review continuing responsibilities.
- What must be done in the next year?
- Can you do it?
- What's it going to be like?
- What can't be done next year?
- Can board members agree?
- Who will be responsible for what?

To start the process, have each board member privately list two or three most important things that s/he would like to see accomplished in the next year. Then the group can discuss what is possible and what is most important from their combined lists. O'Connell suggests that you: keep the meeting focused and action-oriented, the plan simple, involve everyone in the process, have specific goals, consider who your partners might be, and recognize that you can raise the money needed to achieve your goals if you really work at it.

- The general public** benefits because they will understand what your group is trying to accomplish. Plans make it easier for them to decide how they'd like to support your group.
- Donors** benefit because they understand how their donations will be used. They can feel good about the support they provide your group.
- The organization** benefits overall. The group gains credibility as it accomplishes its objective. The organization runs more efficiently because everyone is working toward the same goals. Your membership and volunteer pool grows because everyone wants to be a part of a successful venture. And, the financial picture improves because the group's growing credibility makes it easier to obtain donations of all sorts.
- The refuge** benefits because each of your group's accomplishments will directly or indirectly affect the resource.

A Simple Approach To Planning (contd)

O'Connell notes, "By battling out the difficult decisions about how to utilize limited resources, the individuals really come together as a group. The planning retreats are not easy sessions; properly organized, they should be designed to decide what *not* to attempt to accomplish or what should be assigned low priority, which obviously means that some of the individuals will be disappointed." (p 81) But, having an annual plan makes it possible for the board to say "no" to all the bright ideas generated during the year and progress can be easily charted with everyone aware of what needs to be accomplished.

O'Connell suggests that you print your annual agenda on large posters and have them available for each meeting. "These devices may sound terribly managerial and, indeed, are foreign to most voluntary agencies, but unless citizen groups learn to identify the most important things to be done and then find ways to lock in resources to accomplish them, they will continue to be characterized as inefficient do-gooders." (p 81).

As a final note on planning, O'Connell states: "Don't be put off, but don't put it off. Keep in mind the Peter Principle: 'If you don't know where you're going, you'll end up someplace else.' I would add that, in a voluntary agency, if you don't know where you're going, you'll end up zigzagging in all directions. But, if the board has been involved in a common sense approach to figure out what the resources are and how best to assign them, you're more likely to end up with a giant step in the direction of the organization's basic purpose." (p 85)

What Kind of Plans Does Your Group Need?

Your group will want to have a number of different but related plans:

- **The Strategic Plan** defines the organization's direction in its broadest sense. This is a long-term plan that will last your group for three to five years. It defines your group's mission and goals and describes the general strategies that your group will undertake to accomplish its goals. A strategic plan is relevant to fundraising because it is your group's "master plan." You can use it to show donors who you are, where you're headed, and how you plan to get there. It shows donors that you're serious about what you are doing.

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A strategic plan makes you look at how you plan to do it, at least in general terms. It should seek to answer the question ‘How do we get from where we are now to where we want to be?’ In the process, it makes you define your goals and policies, which helps eliminate the fuzziness and superficial consensus under which many nonprofits (and businesses) operate...Properly done, strategic planning is a process that strengthens consensus and unity and gives any organization a more focused sense of purpose and direction.

— Olenick, 1991, p. 50

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- ❑ **The Annual Plan** defines the specific objectives you’ll want to accomplish in a particular year. It puts your strategic plan into operation and is directly tied to your budget. The annual plan will help you determine how much money you’ll need to raise and justifies your requests to potential donors.
- ❑ **The Fundraising Plan** describes how you’ll raise funds, how much you’ll raise, and who will do the work. The strategic and annual plans lead into the fundraising plan—they define how much you’ll need and how the funds will be used. The fundraising plan defines how and where you’ll get the money. Depending on your group’s activities, you may need to break your fundraising plans into parts, taking into consideration special projects that require extra fundraising efforts, such as a capital improvement.
- ❑ **A Public Relations Plan** will help you decide how and when to get the word out about your accomplishments. Good public relations will generate interest in your work, increase support, and provide you with opportunities to keep in contact with your donors.

“Yikes! That’s a Lot of Planning!”

Planning does require a special effort on the part of the Board to complete, but this effort will save time in the long run. With clear plans in place, you’ll be able to focus your time on action—*accomplishing* what’s described in your plans, not on re-hashing old ideas over and over again. And, being able to clearly communicate your plans will help you raise the money needed to accomplish your goals (“Planning Leads To Fundraising Success” on page 40). Lastly, taking the time to plan will help you create your Case Statement, an important tool for fundraising, especially if you are launching a major campaign.

The Case Statement:

The Case Statement is a final product of your planning process. It is a detailed document that serves as your road map, describing who you are and where you're going. Klein (1996, p. 34) describes the Case Statement this way:

The first task in fundraising is to develop a written document that describes in some detail the need an organization was set up to meet, the way the organization will meet that need, and the capacity of the organization to meet that need...[The Case Statement] is an internal document for use by the staff, board and key volunteers. It is not a secret document, but it is too long and cumbersome for use in approaching the general public. Parts of it will be used in brochures, proposals, direct mail and the like, and nothing that is produced by the organization will contradict the information in the case statement.

Without a Case Statement members of your group may have differing ideas on the group's direction, and you may be working at cross-purposes with each other. The Case Statement requires the input and approval by all board members (although it can be developed by a committee), and the process of writing and approving it will help build consensus and a sense of cohesiveness.

Here is the information you'll want to include in your Case Statement:³

- ❑ **Mission statement** — why your group exists.
- ❑ **Goals** — what you hope to accomplish over the long term (next 3-5 years)
- ❑ **Objectives** — specifically what you plan to do to meet your goals during a particular time period.
- ❑ **Summary of the organization's history** — shows your group is competent and can accomplish its goals
- ❑ **Organizational structure** — roles of the board members and types of people involved in the group.
- ❑ **Fundraising plan** — identifies how much money you need to raise and how you'll raise it.
- ❑ **Financial statement** — previous fiscal year statement and a budget for the current year.

Gene Steele of the "Ding" Darling Wildlife Society states that the Case Statement is a critical step in planning a major fundraiser, such as a capital campaign. He notes that without it, the group will never reach its goal. He calls it

3. Some groups don't have a formal Case Statement, but do have all the elements of this document in their files that can be used as needed. Having a single document that includes all the needed information will, however, make your fundraising efforts easier.

Planning A Budget

Developing a budget is an important part of planning. Budgeting helps you be realistic about how much you can accomplish in a given period. It also helps make those hard decisions about what will and will not be funded.

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Budgeting should always be related to the overall planning process of the organization. No one is in a position to plan for the future without a clear sense of what the available resources are. Conversely, sensible budgets, or financial plans, cannot be put together without knowing where the organization is going. Simply allocating money is not enough. Using it strategically is what the budgeting process ideally should be about.

— Wolf, 1990, p. 149

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Wolf (1990) suggests an eight step process to budgeting (p 149-159)

1. **Make a wish list.** This step gives the board the chance to dream a bit, review its mission and goals and think about programming.
2. **Cost out the list.** Estimate the costs on the high side, adding at least ten percent (10%) to what you think things will cost.
3. **Consider income.** How much can you expect to bring in from each of your group's activities. Are some funds restricted to certain activities? Be conservative and understate all income estimates by ten percent (10%).
4. **Compare.** Some items will clearly be too expensive and not generate enough income. Consider your mission and goals. There may be some items that are not cost effective, but must be done because they are too important to the group to drop simply because they aren't cost-effective.
5. **Set priorities.** This will be a tough process of selecting the projects that best meet your group's mission and goals while staying within budget.
6. **Adjust and balance.** If you were conservative on both ends (overstating expenses and understating income), you should come out with a budget that suggests more coming in than going out. This will allow you room for adjustments along the way (some things will cost more, others less, and you will have some unforeseen or forgotten expenses).
7. **Approve** after full discussion and review by the board.
8. **Monitor and amend.** Changes will need to be made over time. The budget should be monitored on a regular basis and amended as needed.

a living document that you will refer to again and again, and that you'll want to revise as you reach each of your fundraising goals.

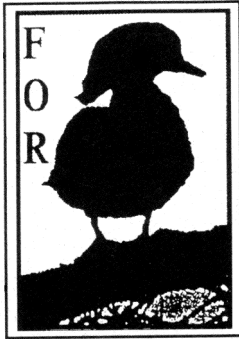
If you are serious about raising significant funds for your organization, you will want to take the time to plan and document your direction. In the long run, these steps will save you significant time and will give your organization a sense of professionalism. This professionalism will make your group a good candidate for donors seeking to make significant contributions.

Creating a Fundraising Plan⁴

There are a number of steps a Friends group can take to creating a fundraising plan. These include:

1. Analyze the group's income sources and trends over the past few years. Look at the number of gifts and amounts from each source. Examine membership renewal rates and size of gifts.
2. Project your program's goals and expenses for the next year or two. Determine costs and expected income from three perspectives: bare-bones, reasonable and ideal.
3. Decide on ways the group can diversify its fundraising programs and sources and how you can involve more people involved in fundraising activities.
4. Set an annual and monthly goal for income and create a timeline for fundraising tasks. Take into account membership renewals (definite, likely, possible and prospects).
5. Develop systems for managing and tracking information. By creating good data storage and reporting systems, you'll have information readily available for creating your fundraising plan next year.

4. Adapted from Institute for Conservation Leadership Fundraising Presentation, Friends Academy (1999).



Planning Leads To Fundraising Success

Friends of Tualatin River NWR, Oregon

Friends of Tualatin River NWR have discovered that planning can lead to great things –from a new sense of purpose to fundraising success. In 1998, the group was five years old, and during that time it had experienced many changes, including a complete turn-over of the board. The group decided it was time to re-evaluate the organization and strategize for the future. They submitted a grant application and were awarded \$1,500 to develop a strategic plan.

The Friends developed their plan in two steps: first, a small group of members worked with a facilitator to outline the procedure they would use; then they pulled others into the process, including FWS staff, to plan for the future. Their plan focused on three priorities: outreach, public access, and capacity building.

The group's President, Joan Patterson, notes that the group experienced a number of benefits from the strategic planning process:

- ❑ **The group now has a vision for the future and clarity about how they want to achieve their goals.** The process forced them to decide together what was important, where they should focus their energies, and where they wanted the refuge to be in the future.
- ❑ **The success of the organization is no longer dependent on the leadership of one or two people.** They have gained stability and confidence in their ability to succeed, because planning was done as a group. If one leader moves on, they won't have to re-build from the ground up.
- ❑ **The process provided for a good dialogue with refuge staff,** even though FWS involvement was somewhat limited due to staffing.
- ❑ **The strategic plan has given the group credibility and made it easier for them to raise funds.** Joan explains that when the group seeks funds for their projects, they can show that they are a viable organization. Their plan shows they are serious about their work and have been thoughtful about how they expect to achieve their goals.

The results for the Friends in completing their strategic plan have been almost immediate. Shortly after developing their plan, they were asked to submit a grant application to a local high school that was participating in the Communicare⁵ pro-

5. Communicare is an educational program that teaches high school students about foundation giving. In this program, a foundation awards \$10,000 to a class of students in a local school. These students are then charged with developing a grant program in which they will award the money to grassroots organizations of their choice.

gram. The Friends were one of a select group of environmental organizations that received the request for proposals.

In their proposal, the Friends requested \$1,700 for audiovisual equipment for their outreach programs. They attached a copy of their strategic plan to show how this funding request was one piece of a well-thought out plan for building community support for the refuge. The students were so impressed with the Friends' program that they decided to double the grant award to \$3,500!

The strategic plan has helped Friends of Tualatin River in a number of other ways:

- ❑ Because gaining visibility for the refuge is a Friends priority, **they have been able to make a conscious decision to seek donations of funds, goods and services from the local community for a festival**, rather than seek support from the FWS or other outside funding sources. In this way, the Friends get the community directly involved—even though there is no public access, the community won't "forget" about the refuge when they have donated something of value toward it.
- ❑ Because they know their priorities, **the Friends can break the plan into individual projects and then raise funds for each one at a time**. By doing one project at a time, they can experience incremental successes, make it easier to accomplish their goals, and reduce the chance of burning out dedicated volunteers. The plan is helping them consider how to increase their volunteer base and even to decide when it might be appropriate to bring on paid staff.
- ❑ **The plan has allowed the group to compose its "Case Statement"** (see Appendix C), which describes such things as the organization's mission, goals, objectives, history, and fundraising plan. Having the organization's story succinctly written has proven to be a useful time-saver. Where it once took Joan a week to write a grant application, it now takes a day because all she needs to do is pull the needed information from their case statement and plug it into the application.
- ❑ **They can respond quickly when funding opportunities arise**. They know what they need and have the materials to backup their requests for funds. They know whether or not a funding opportunity is appropriate for their group and they don't have to go "back to the drawing board" each time.

Friends of Tualatin River NWR found that the time they put into planning had huge payoffs and some surprise benefits too. Their experience shows that planning is a useful tool for developing a Friends organization and for positioning the group for success in fundraising.





[painetworks.com/Bill Beatty](http://painetworks.com/Bill%20Beatty)

The chapters in this section are designed to give you some general ideas on ways your group can raise funds. This section will help you get started as you consider which fundraising avenues will work best for your group. For more detailed information, I highly recommend that you obtain the fundraising books listed in the resource section.

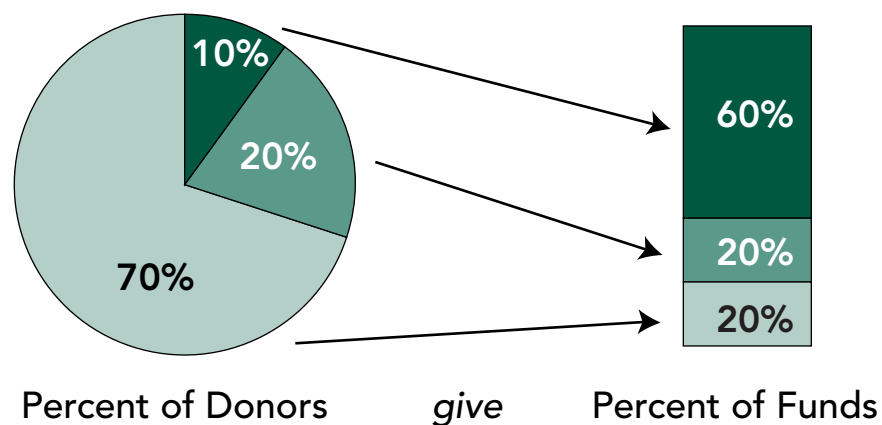
Where Does the Money Come From?¹

Money can be raised from all sorts of places and in many different ways. One challenge facing your group is to identify which options will work best given your local community and refuge.

Regardless of which avenues you choose, you'll want to focus your greatest energies on raising funds from individuals. Individual donations comprise eighty to ninety percent (80% to 90%) of funds received by nonprofits, compared with about seven percent (7%) from foundations. And individuals donate more each year through bequests (6.8%) than corporations, who give about five percent (5%) of all nonprofit dollars!

Individual donations are also important to diversifying your funding mix. Diversity is important so your group won't be too dependent on any one source of funds—if a source of funds dries up, your group will survive.

Nonprofits find that not only do individuals make up the greatest portion of donations, a handful of individuals contribute the greatest amounts:



Given the patterns of giving, two expert fundraisers offer the following advice:

First, Joan Flanagan (1995) writes, *“Because 90 percent of the money for nonprofits comes from individuals, spend 90 percent of your time asking individuals for money.”* (p.10)

Similarly, to paraphrase Klein (1996), you should *focus your energies on the small portion of donors (10%) who contribute the largest portion (60%) of funds to your organization. You’ll spend less time and get more money than if you focus on the larger portion of donors (70%) who contribute only a small amount of funds (20%) to your group.*

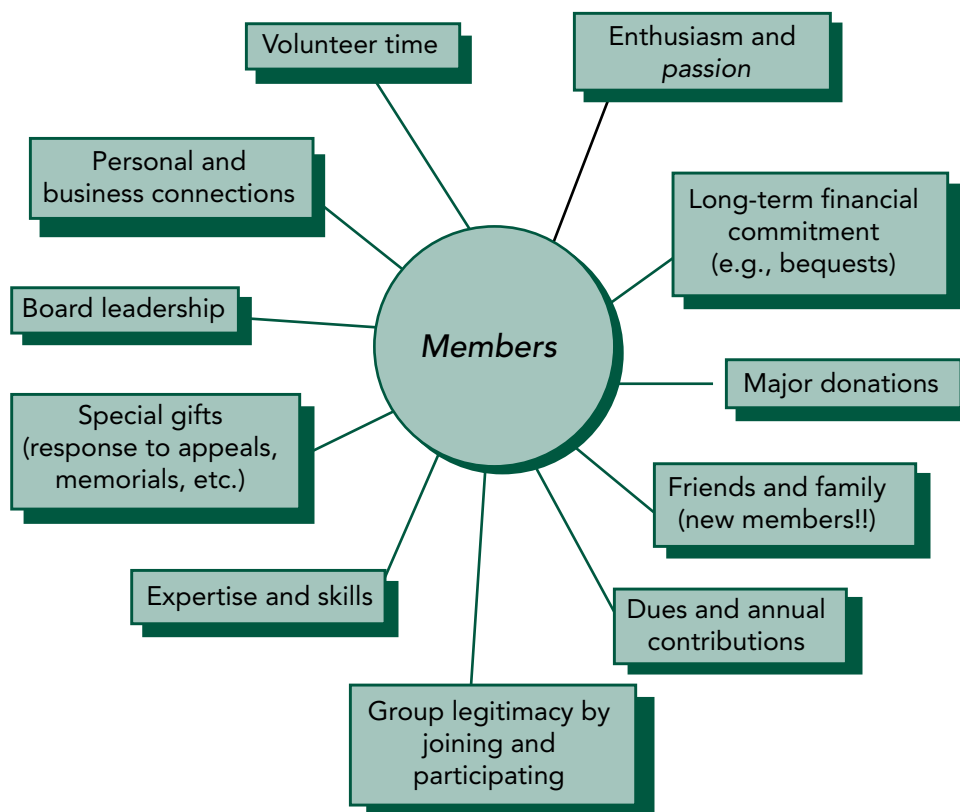
1. Adapted from Flanagan (1995), Klein (1996), Robinson (1996), and Seltzer (1987).

Finally, the goal of fundraising from individuals is to move them from being impulse donors to becoming donors of habit, giving bigger gifts regularly, and to give gifts from their assets or estate. Each of the chapters that follow offer a number of tips and tools for meeting each of these goals.

From Membership to Major Donors:

Membership development is a critical component of any grassroots fundraising effort. Because members provide a steady, reliable source of income, they are an important source for achieving financial stability. Member contributions can be used to finance your organization's most basic activities, such as office administration, newsletters, postage, etc. With a stable and growing membership, yearly contributions can be predicted fairly easily, making annual budgeting a relatively simple activity. In addition, members bring more than their financial contributions; they bring their volunteer time, family and friends, and their connections which give the organization visibility, prestige and power.

Considering what you gain from members, it simply makes sense to spend lots of time on your membership development program. Here's a sampling of what your members bring to the group:



An effective membership development program takes time and effort, but, even in small or remote communities where large memberships are difficult to come by, a good program will result in big payoffs. Membership development is all about attracting, keeping, and moving your members from basic contributors to major donors. In designing your program, you'll want to focus on three areas:

- ❑ Consider why people give in the first place (what appeals to them);
- ❑ Decide what your group can do to keep these members; and
- ❑ Get members to contribute more over time.

Attracting Members:

There are many tools available to attract people to your group. From special events to brochures and special mailings, the idea is to get your message in front of as many people as possible. And you'll want the message to be compelling and draw their attention. Here are some ideas to consider:

Packaging Your Message:

Getting your message across is your first step in building membership. You'll want to communicate why your group is important in a way that attracts folks to your organization. Brochures, newsletters, program announcements will all need to communicate a message that addresses the needs people have to give. A great resource for "packaging your message" is *Getting the Word Out in the Fight to Save the Earth*, by Richard Beamish (1995). In this well laid-out resource, Beamish discusses such things as brochure design, direct mail, news releases, in detail. Taking the time to develop your unique message and look will be well worth the effort.

Know Your Constituents:

It's important to know *who* your supporters are. It doesn't make sense to spend lots of time and money on people who are unlikely to give. Klein (1996) discusses three categories of lists that you can use for raising funds (p. 62):

- ❑ Hot list—people who have already made some kind of commitment to your organization (current donors, lapsed donors, volunteers, board members who aren't already donors, close friends and associates of these folks).
- ❑ Warm list—people who have used or heard of your services or who donate to organizations similar to yours.
- ❑ Cold list—any list that is older than one year or of people about whom you know little or nothing (e.g., phone book).

You'll always get a better response to your fundraising appeals from folks who appear on your hot lists, but even cold lists can result in new members and donations. These lists can be used for membership drives, phone-a-thons, special fundraising appeals, and general announcements about your group's programs. A number of resources provide detailed information on how to develop these lists and their expected yields for different fundraising programs (see Flanagan (1995) and Klein (1996)).

A Few Tools for Getting Members:

You can use any number of tools to build your membership, and your group is sure to create many of its own ideas. Here is a sampling to get your started:

- **Newsletters and brochures** can be used as advertisement for the organization. You could:
 - Send complimentary newsletters to your target audience with information on how to subscribe;
 - Place materials in areas frequented by potential members, such as libraries, local shops and businesses, the Chamber of Commerce, and the refuge (with their permission, of course).
 - Ensure copies of brochures and newsletters are readily available at events and speaking engagements.
- **Offer member benefits**, which give donors something tangible for their donation. The most common benefit is a newsletter. Others may include bumper stickers, T-shirts, coffee mugs, or bookstore discounts. Another benefit you could offer is special refuge tours (e.g., "behind the scenes" tour of places not readily accessible). Groups might offer a basic membership package that includes the newsletter. For higher categories, the donor receives the basic package, plus a bumper sticker, T-shirt, refuge tour, or other incentive. A guideline offered by Klein (1996, p. 90) is that the benefit should cost no more than 1/5th of the lowest membership category to produce and send. When you offer your benefit, plan to tell donors the value of the gift and realize that some may not want the premium.
- **A table top display** that presents your organization in pictures and words is a useful tool for membership development. Newsletters, brochures, and newspaper articles can be included in the display along with any items you may have for sale. The display can be set up during Friends events, the refuge visitor center, and at local fairs and meetings of other organizations. Having both a person staffing the display who is prepared to enroll members, as well as membership materials readily available to take home, will maximize your chances of getting new members.

- **Speaking engagements** can be reasonably easy to obtain at local organizations and clubs that conduct programs for their members. These groups are often eager to engage speakers from the area who can speak on various subjects, or simply about their groups. Set up a speakers bureau and offer to send volunteers to speak at meetings and events. Use these opportunities to set up your tabletop display, distribute information about your group and gather new members. Get extra mileage by publicizing your speaking engagements in local newspapers both before and after the meeting. Save copies of news coverage to send to your members, supporters, and legislators as appropriate. These clippings can provide your constituents with an excellent reminder of how active and vital your group is to the community.
- **Direct mail** can be used to seek contributions, new members, and for donor retention. A variety of materials can be included in the mailing, such as a letter of appeal, a newsletter, brochure, and contribution or membership remittance forms. Up front costs of direct mail can be expensive, but in time, this tool can easily pay for itself, especially if you use hot or warm lists. Direct mail is a great way to reach large numbers of people who are unfamiliar with your group. And, over time, you will develop a list of people who you know will donate funds as a result of a mailing, thus building your base of support. Beamish's book (1995) is an excellent resource for planning and preparing your direct mail package. It is an easy to read guide that will help you develop appealing and compelling materials to include in your mailing. Klein (1996) also provides an excellent and detailed discussion on direct mail in *Fundraising for Social Change*.

“

Small organizations should ask their current donors for money at least two or three times a year, either through the mail or with a combination of mail and phone solicitations and special events. This frequency of asking will not offend people and will keep the name of your group in your donors' consciousness. It also enables you to take advantage of the ups and downs of each donor's cash flow.

— Klein, 1996, p. 60

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How Much For Dues?

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It is better to lose some prospective members because your dues seem too high than to lose many more because your group never does anything more interesting than put on special event fundraisers.

— Roxanne Conlin, quoted by Flanagan, 1995, p. 52.

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Friends groups often struggle with the question: “How much should we charge for dues?” Around the country, one can find entry level dues that range from \$5 to \$30. Often the argument for charging a minimal amount is to get people to join, but this could send the message that your group is not serious or professional (the old adage “you get what you pay for”).

Flanagan (1995) presents a detailed discussion on dues in *The Grass Roots Fundraising Book* (p. 49-71). She notes the following advantages to dues:

- Increase the commitment of members.
- Give the organization a reason to want and to keep new members.
- Dues are dependable, renewable and democratic.
- Provide a foolproof way to find out who likes you, who doesn't and who hasn't decided.
- Give the leadership an accurate reading of what members like most.
- Remind members each year of the organization's value and importance.

- Phone-a-thons** can be used to generate publicity for your group, obtain new donors, and get people to renew memberships. You can use them to thank donors for gifts, survey members, ask donors to upgrade their gifts, sell raffle tickets, or ask members to attend events or meetings. Phone-a-thons (telemarketing done by volunteers) are inexpensive, have a high rate of return (because they get you close to the donor) and are good money makers.

While telemarketing is a highly successful method of fundraising (its success is exemplified in the number of organizations and businesses that use it!), it can be viewed as a personal intrusion. Indeed, Citizen's Committee to Complete the Refuge in San Francisco, California makes the following pledge to its contributors:

How Much For Dues? (contd)

- ❑ Are a quick way to raise funds—you get money the day you start selling memberships.
- ❑ Make your organization self-sufficient.

In setting your dues you'll want to consider your local area to decide what's appropriate (e.g., consider what are other similar groups charging). Dues should pay for the general administration of your group (mailings, postage, member benefits, office supplies, printing, etc.). Start with your budget and determine how much you need for basic operations, decide how many members you want to attract, and then set your rates accordingly.

If you ask your board members to list the amount of money they pay to other organizations and how much time they give to each group, you'll likely find that the groups that ask for the most money also get the most time. Don't be afraid to set your dues "too high"—you're better off with fewer, dedicated members who really support your organization than with a larger, but weaker membership.

Another way to increase your income from dues is to use a monthly giving program (pledge system): instead of \$25 a year—ask for \$10 a month and raise \$120. If you choose a pledge system, be sure to have mechanisms in place to track pledges and remind members to make their monthly contributions.

“

An inevitable part of any discussion about dues is the declaration by someone that the organization should not have dues (or the dues should be very low) so that 'no one is excluded.' Someone will argue that, if you set dues, some people won't join. That is true. The people who won't join are the people who do not want your organization. If people want your group, they will pay for it.

— Flanagan, 1995, p. 60

”

- We solicit funds only twice a year, through a Summer and Winter Newsletter.
- We do not share our membership list with anyone.
- We will not phone you soliciting funds at dinner time or any other time.

Before conducting a phone-a-thon (or any other method of fundraising), your group will want to review the pros and cons of this method. You might consider ways to make it more palatable, such as wide advertising beforehand so people are prepared for the calls, or simply

using it as a way to inform the public about your group and create a list of interested folks who could receive a direct mailing in the future.

- ❑ **Place a sign-up sheet or guest book at the refuge that informs visitors you'd like to send them information.** Ask for names, addresses, and phone numbers. You can then send membership information, introductory newsletters, invitations to events, and include these people in your direct mailings or telethons.
- ❑ **Use events to attract new members and solicit names and addresses for future mailings.** Set up a membership table at all of your events. Collect name and address information from donation drawings, silent auctions, and ask participants to sign-in at programs.
- ❑ **Establish a website and take memberships via email.** Use of the Internet is becoming an increasingly important tool for groups to gain visibility, sign on new members, and sell products. Many Friends groups now have websites and are willing to share their expertise.²

Tools for Keeping Members:

Once you have members, you'll want to keep them. You'll want them to continue renewing each year, and to renew at higher membership levels. Here are a few ideas to help ensure that your members keep coming back for more.

- ❑ **Find out what interests them.** One way to do this is by conducting a simple survey. Ask members what they like for programs, what interests them about the group, and how they would like to participate in group activities. The survey information can give you a good sense of who belongs, why they joined, and what they value about your group. You can also gather information less formally by asking questions when members participate in group activities (e.g., what brought you here, what did you like about this event, what other things would you like to see the group do?). Asking questions at events provides a great opportunity to meet members and get to know them better. Information gathered in these ways can serve as a basis for building stronger programs and guiding group decision making.
- ❑ **Meet your member's needs.** People join, donate funds and participate in groups for lots of different reasons. Some want to volunteer, others support the group's mission, and others enjoy the programs and social opportunities. Consider what your group has to offer to meet the varied needs of your members. Make plenty of options available and be pre-

2. The Refuge Support Group Directory, available through the US Fish and Wildlife Service or on-line at www.refugenet.org, contains a listing of groups with websites. See the resource section for information.

pared to both actively seek out more member participation and have systems in place to respond to members who seek you out.

- ❑ **Keep them informed.** Not only is your newsletter a great tool for acquiring members, it's a critical tool for keeping them. Your newsletter can provide all sorts of information that is of value to your members: educational articles, updates on group activities, refuge updates, volunteer information and appreciation, and more. Your members will appreciate the information you send them and a well written newsletter will keep them interested.
- ❑ **Engage them personally.** Remember that everything about your organization boils down to relationships. Your members are more likely to continue to renew and donate their time and funds if they feel they are a part of the group. By engaging your members personally, you provide an opportunity for them to get more involved. One way you can do this is to establish a welcoming committee for each event whose job it is to meet participants, talk to them about the group, and get to know them more personally. Over time, your welcoming committee will get to know repeat guests and members quite well. They can encourage non-members to join and get members more engaged in the group's activities.
- ❑ **Honor your members.** You could offer special members-only events. Offer discounts at your bookstore, and other benefits specifically for members. And, most importantly, recognize their service and financial contributions in your newsletter, at events, and in the local newspapers (people love to see their name in print).

Beyond the Basics — Making Members Major Donors:

If you've developed good systems to get and keep members, you'll be setting the stage for building a list of ardent supporters, people who are willing to make major investments in your organization. Similar to your membership program, a major donor program requires some thought and planning. If you decide to create a major donor program, see Klein's (1996) book *Fundraising for Social Change*. She goes into great detail on how to identify and nurture these donors. In the meantime, here are a few tips to get you started:

- ❑ **Decide what is a major donation** – is it \$50 or \$500 or somewhere in between?
- ❑ **Set up your dues structure to allow for high end donations.** If you don't provide an opportunity for people to donate at a higher level, you'll never get these gifts.
- ❑ **Set up a good system to track donations and identify those that are high end contributions.** Having systems in place to identify major donors will make it easier to respond appropriately when a gift is made.

- ❑ **Say thank you** with a *handwritten note* within a day or two of receiving the donation. This should be done for all donations regardless of how big or small. Make sure you have systems in place to do this in a timely fashion.
- ❑ **Decide how you want to keep in touch with major donors and who will be responsible for doing so.** You don't want your responses to be haphazard or untimely. Think ahead about how you'll nurture these folks and who will do it.
- ❑ **Know your major donors.** If someone unknown to your group makes a major donation, find out who they are! Designate someone to call with a special thanks. Send a special invitation to attend an event and designate a person to welcome and get to know the donor. It might even be appropriate to ask the person out for a cup of coffee or lunch. You could use this opportunity to find out what they like about your group and how else they'd like to participate in group activities. Once you begin to know your donors more personally, you'll be in a better position to nurture the relationship.
- ❑ **Provide a wide variety of opportunities for giving and communicate regularly.** The more giving opportunities you provide, the better your chances of finding a match for your donor. Perhaps s/he would like to donate toward an educational program for kids, but not toward an information kiosk. Also, be sure to regularly publicize your group's needs, through your newsletter, at events, and special mailings. A donor might not give this month, but would next—keep the requests coming.
- ❑ **Ask!** The best way to get a donation is to ask for it, in person. You are rarely going to receive a major donation from someone who is a stranger to the group. As you build members, provide opportunities for them to participate, and get to know them, you'll be building the *relationships* you'll need to make it easy to ask for major contributions.
- ❑ **Keep in personal contact with your donors.** Klein (1996) notes that people who give thoughtful gifts require more personal attention than the rest of the donor base. "They think about your group and how much they can afford to give and...they expect you to treat them thoughtfully in return." (p. 182) Some ideas for keeping in touch:
 - Personalize written communications, for example, someone who knows the donor could add a note of personal interest to the donor when you send your newsletter.
 - Send special mailings to your donors, such as copies of press releases or news articles, personalize with a handwritten note.
 - Send holiday or birthday cards.

- ❑ **Plan special programs to recognize major donors.** Set up systems for saying thank you and communicating with donors on a regular basis. Recognize donor contributions in your newsletters and press releases. Plan special donor recognition events.
- ❑ **Remember: Say thank you!**

Finding Major Donors:

You'll want to reach within and outside your membership for major donations. But, how do you identify these people? Klein (1996) describes three characteristics of donor prospects (p. 157):

- A. They have the **Ability** to give
- B. They **Believe** in your cause
- C. They have **Contact** with someone in your group.

Contact is the most important, because without it, you don't have a prospect.

To identify prospects, start with who you know. Your board might brainstorm about all the folks they know that might be willing to donate something to the group. Once you have a list of names, discuss each one – do they believe in your cause? If they do, keep them on your list, if not, cross them off. For those you're not sure about, discuss ways you might find out (e.g., other contacts who could give you the information you need).

Next, consider whether or not the potential prospects on your list have some ability to give. If you decide that they do, discuss what amount you might ask for. At this point, you may need to do some research, for example, review annual giving reports from other organizations for your prospects' names. This information will give you an idea of how much they have been willing and able to give other groups. Without this information, you could use the following yardstick (Klein, 1996, p. 159):

\$50 to \$500 –Someone employed in a job paying more than minimum wage and not supporting many other people.

\$500 to \$2,500 –You'll need to know more about your prospect to ask for this amount: are they married, have a well paying job, a small vs. large household, are they committed to the group?

\$2,500 –This gift generally comes from people who are already donors and can be asked to upgrade their gifts. Rarely will someone start giving to a small organization with this size gift.

As a final note, don't worry about asking for too much. You're more likely to flatter someone than to insult them with a request that is more than they can afford. Remember, they can always offer something less.

Asking for Money³

You have a prospect. You'd like to ask for a donation, but you're not sure where to start. Here's a basic outline.

- ❑ **Make a personal donation.** It's awfully hard to ask for a donation from someone if you haven't made a contribution yourself. The amount of your contribution doesn't matter, but it needs to be significant for you.
- ❑ **Leave your fears at home.** First of all, your odds are good: you have a 50% chance that the person you ask will say "yes." And, the worst that could happen is the prospect will say "no." You need not be offended, people have lots of reasons for saying "no," its not personal—maybe they just bought a new car and can't afford it this time!
- ❑ **Approach your prospect.** There are a few basic steps to follow (note that depending on the person, one or more of these steps may not be needed):
 - **Send a one page letter** that describes the organization, includes a statement that you wish to ask for a gift, and request a meeting. The letter introduces the idea that you will be asking for a large gift and want an opportunity to briefly describe why you want the gift and why you think the prospect will be interested.
 - **Make a phone call** to set the meeting date.
 - **Meet** to solicit the gift. If you get to this step, your prospect is considering saying "yes." The Institute for Conservation Leadership suggests the following process for the meeting:
 - *Establish rapport: Stress the things you share, such as a mutual friend.*
 - *Seek out the prospect's needs and interests: Why are they interested in your work?*
 - *Make the case for your organization.*
 - *Ask for the gift: Always ask for a specific amount or range of donation.*
 - *Respond to objections: Anticipate these and have ready responses.*
 - *Complete the visit: If the prospect asks for time to consider, offer to call back in a few days. If s/he needs more information, leave your materials or offer a tour of the refuge, etc. Say "thank you for your time."*
- ❑ **Send a thank you note within 24 to 48 hours.** Thank the donor for his/her time and for the donation. Send a note even if the prospect says "no" to your request! You never know when the next opportunity will arise. If you leave a good impression, your prospect will be more likely say "yes" the next time.

3. Adapted from Klein (1996) and Institute for Conservation Leadership (1999).



Recruiting and Retaining Friends

Friends of Bosque del Apache NWR, New Mexico

Author's note: This article first appeared in the Summer 1999 issue of the National Wildlife Refuge Association's Friends Flyer (Volume 2, Number 3). Thanks again to Barbara R. Dubois for her contribution.

The Friends of the Bosque del Apache NWR, have had many successes in our membership program. We have used many strategies: publications, committees, annual meetings, special events, the inclusion of Resident Volunteers as members, and personal invitations to join and participate actively.

Outreach: Recruiting Members

Publications are one of our most effective tools for membership. Our brochure describes us as a friendly group working to make the Refuge an even better place for wildlife and visitors. After narrating what we do and what a new member might do, the brochure provides a membership application with a list of activities that may inspire volunteer service.

Anyone working at the Visitor Center desk—giving information and/or selling books and gifts—gives each visitor a brochure and asks the visitor to consider joining. Attractive bookmarks are also distributed to visitors, which encourages donations and solicits membership. Our newest incentive is a 10% discount on merchandise to Friends members.

The newsletter, published six times a year, is the communications tool that keeps members excited about the Refuge and the Friend group. We send it primarily to members, but we send also to local and national legislators and to important neighbors who might become supporting members. The editor of the newsletter also publishes a monthly article in the local newspaper which helps to communicate to an even larger audience.

Investing In Members Through Committees

We have seven committees that work together to recruit active members. The membership committee's current emphasis is on recruiting local members. The public relations committee distributes publications over a wide range of areas and works with the media.

The education committee has arranged summer programs and promoted teacher training and scholarships that bring school children to the Refuge. The merchandising committee and the finance committee work with the business manager to find appealing products including shirts, mugs, jewelry, and books.

The special events committee handles the Refuge's involvement in the Festival of the Cranes and other refuge events. The visitor facility expansion committee works to interest individual donors and the government in helping us improve the facility.

Finally, the long-term planning committee works to revise our mission statement and bylaws.

Encouraging Member Participation

We use our annual meetings to recruit and retain members. Each year we have tried to make the event more appealing, making it a full weekend, with such features as owl walks, hikes on new trails, optics workshops, star parties, and petroglyph and geology field trips.

Our special events throughout the year draw new members and help to retain old members. Through the summer we schedule speakers, field trips, star parties, bird-feeder workshops, and artists' presentations. Local artists who design our shirts and totes are recognized with a reception in the fall each year. Another fall event is our naturalists' training weekend, which often includes training in public relations.

Our main special event is the Festival of the Cranes which takes place the third weekend of November each year. It is our best attended event and always recruits and helps to retain members with four days full of notable speakers, photography workshops, and art, raptor, and reptile exhibits. Last year a beautiful wolf and puma attended the event.

Creating Allies

One of our Refuge's most successful programs is our Resident Volunteer program. The Refuge Manager began the program several years ago, giving space and utilities and a small daily allowance to qualified retirees. These volunteers bring with them many skills as carpenters, electricians, mechanics, secretaries, artists, photographers, and computer geniuses, to name only a few.

At first, there was some hostility on the part of the Resident Volunteers and even some staff members toward the Friends, who were seen as dabblers instead of serious workers. But the years have demonstrated that the Friends, though they may not have 8-hour days to give, work hard as tour guides, computer operators, trail builders, and public relations agents.

When the Friends purchased two-way radios for the Refuge when federal money was short, both volunteers and staff realized what an asset the Friends group could be. When the Friends voted to give automatic memberships to the Resident Volunteers, relations improved tremendously. Additionally, when the Friends took over the bookstore, making it twice as profitable as before, the value of the Friends became clear.

Now the Refuge supporters—staff, Resident Volunteers, and Friends—all work together, each a distinct group, but all dedicated to the Refuge. There is such devotion that in 1995 when the federal government shut down during the Festival of the Cranes, everyone at the Refuge became a volunteer—staff, Resident Volunteers, and Friends to ensure the Festival went on. We made many new Friends by being one of the few sites remaining open to the public, proving our dedication to the Refuge.

Success in the Making

Although our Friends group faces many challenges we meet these challenges with vigor. Our refuge is at a relative disadvantage because it is 100 miles from a major city thereby lessening our pool of members. Our nearby community, numbering 8,000 in population, is a lower income area with only a few citizens who are able to support charities and organizations.

We have tried over the years to involve the local community and elicit more support and we continue to work towards this end. For two years, we have had a Socorro County Appreciation Day to draw local visitors and enlist their membership. Bad weather and conflicting events depressed attendance and discouraged us, causing us to suspend the event for the time being.

Although we have reassessed the situation we refuse to give up. The membership committee has begun making publicity presentations to local civic groups. The committee is now developing a slide show to enliven their presentations. Our membership has grown from a total of five at founding in September 1993 to 600 in 1999. We are confident that we will eventually meet with success and our membership will continue to grow because anyone who visits the Refuge immediately falls in love with our habitat and its creatures.

Our membership has grown in numbers and effectiveness through offering:

- discounts on merchandise
- newsletter
- annual meetings
- special events
- Resident Volunteer memberships
- camaraderie with like-minded lovers of wildlife
- pride in belonging to such a worthwhile group





Cultivating Members — A Key To Fundraising Success

Friends of John Hay NWR, New Hampshire

John Hay NWR is unique in that it was established to preserve not only wildlife habitat, but also an historic house and its gardens. No Fish and Wildlife Service (FWS) funds are allocated for its management, nor are any FWS staff stationed at the refuge. It is the

Friends of John Hay, under a cooperative agreement with the FWS, who are charged with the full management of the refuge, its house and gardens.

Friends of John Hay was established in late 1996. Within almost four years, it has grown to a membership of more than 500 people. In addition, its budget has grown from less than \$25,000 to \$190,000 during that same time. When the Friends started, they had the advantage of a six year history of support for the historic gardens, which were managed under a contract with another organization. Despite this advantage, the Friends were a new group in 1996, and they needed to build their membership, programs, and budget from scratch.

Maggie Stier, Executive Director, attributes much of the group's success to its concentrated effort on attracting and keeping members. The group takes member cultivation seriously and focuses much of their energy on developing personal relationships.

Member cultivation is done in a variety of ways. First and foremost, the group gives the impression that “they have their act together and know what they are doing.” They build this impression through their newsletters, annual report, member and public events and programs, and regular press releases about upcoming events.

Secondly, they focus lots of time on basic, entry-level programs. Maggie notes that getting folks to attend free programs is relatively easy and the program provides an opportunity to showcase the organization. The goal is to draw people in, with the belief that they will join only after having had some exposure to the group through its events or programs. Once someone has joined, the group can focus on developing a more personal relationship that will ultimately result in a long-term commitment to the organization.

The group's members believe there are two basic reasons people join the organization. First, because they love the refuge and want to support it, and second, because they have something to learn. Maggie notes that the people passionate about the refuge probably have already joined. So, they focus much of their attention on programs and communications that will “hook” new members.

There are a few key strategies the Friends have been using to build their organization. These include the following:

❑ **Know the refuge's constituency.**

The group is learning about refuge visitors and their interests through a year-long survey. Among other things, the survey will help them better understand:

who the visitors are and where they are from; what they do when they visit; how long they stay; and the quality of their visit. The survey will provide a visitor profile and will be useful for promoting the refuge and in developing programs and services, such as trail guides, interpretive materials, and rest rooms.

□ **Focus on membership for fundraising.**

When the Friends started, there was a six-year history of fundraising for maintaining the historic gardens. Previous annual fundraising appeals had brought in about \$6,000 to \$8,000. However, this approach was hit or miss, and didn't provide any tangible benefits for members. The Friends decided they could be more effective fundraisers if they created a true membership program. Their plan included the following:

- **Create a membership brochure.** At first, due to limited funds, the brochure was inexpensively printed in black and white. After three years, the group has moved to a full-color brochure. "The lesson for us," states Maggie, "was to start small. It wasn't perfect, but the brochure was an important tool to building membership." Now, their fundraising programs include both a Spring membership drive *and* a Fall annual appeal. In the first year, the membership drive alone raised \$26,000; in their fourth year, it will likely top \$40,000.
- **Provide tangible benefits** to members. Basic membership includes benefits such as discounts on educational programs, free admission to the refuge, and a 10% discount for purchases in their shop. For higher membership levels, benefits include free gifts, such as a tote bag or plant, and private tours of the historical house.
- **Cultivate members** by providing many opportunities for exposure to the organization. The group focuses on four areas: educational programs (to bring people to the site), a newsletter (to inform members about what their contributions are accomplishing), special events (to raise funds), and member events (to show appreciation for past support). Their goal is to reach every member through at least one of these opportunities each year. Each of these activities expose people to the organization and allows them to deepen their personal connection to the site.
- **Build a volunteer program.** Members can join as volunteers and work on projects that build an ongoing sense of pride in the refuge and the organization. The Friends give their volunteers extra attention by sending them a special volunteer newsletter and honoring them with an annual appreciation event, such as a pot luck dinner and tour. The group has found that their volunteers tend to become deeply involved in the organization and are one of their largest source of higher level memberships.

□ **Get good publicity.**

Publicity has been an important aspect of the Friends' fundraising program. People like to know their contributions are making a difference, so getting current successes in the local press helps build confidence in potential givers to the organization. The Friends send out press releases for all major events and often have something in the newspaper several times a month. Thousands read about their programs which helps to increase membership and their contribution levels because they see growth and activity at the refuge. Paid advertising to publicly thank donors after a big event is also part of the Friends strategy.

Fundraising by concentrating on membership development has proven highly successful for the Friends of John Hay. For the future, the group plans to get to know major donors better as they prepare for a capital campaign. In addition, they are developing an endowment fund for long-term care of the buildings on the property. In focusing on their membership, the group has laid the groundwork that makes these new efforts feasible. Through membership development, Friends of John Hay has built organizational stability and forged relationships that will ensure a bright financial future for the group.



Giving Programs:

There are a variety of giving programs your Friends group can develop. The idea is to offer something to everyone – meet the needs and interests of all your donors by providing a wide array of opportunities for giving. In addition to your basic membership dues and/or annual appeals, plan to offer programs that allow your donors to give for the future and on special occasions.

Giving for the Future: Planned or Deferred Gifts (Seltzer, 1987, p. 172-5)

A planned giving program helps ensure the long-term financial stability of your organization. Planned gifts are those made by a donor for future use by the organization. One of the most common and simplest examples of this type of gift is a bequest, where an individual gives part or all of what s/he owns to the group through a will. Other types of planned gifts include life insurance, gift annuities, trusts, and gifts of property.

“

Anyone can make a bequest. All that is required is that you are alive and of sound mind when you make your will, and that you own something that you can't take with you. Many grassroots groups think that bequests are only for wealthy people. In fact, however, if all you own is a 1976 Chevy Nova, you can leave that car to a nonprofit organization and they can sell it for \$200 and have the money.

— Klein, 1996, p. 217

”

In each of these cases, the donor makes a specified gift for future use by the organization and the donor gains a tax benefit from the donation. Setting up a bequest program can be as simple as asking your donors to remember your group in their wills, but the other forms of planned gifts are a bit more complicated to establish. Plan to consult a lawyer and/or accountant to help set up these programs.

Because planned gifts become available some time in the future, they cannot be used to offset or plan your annual budget. However, they can be used to build a foundation of support that secures your group's financial future. This is generally done by using planned gifts to establish and build an endowment fund. An endowment fund is basically a savings account where an organization sets aside funds and uses only the interest from the account. As an endowment fund grows, the organization has a sure source of regular, long-term funds.

“

What is most important about planned giving is that it allows a donor to help ensure that what he or she stands for and believes in and contributes to will continue into the future. People who have supported an organization for years and years have a chance, at little or no cost to themselves, to see that the organization continues to be supported after they have died.”

— Klein, 1996, p. 214

”

Special Giving Programs:

Another opportunity to raise funds is to set up any number of special giving programs. Your Friends group can be really creative with these programs and provide opportunities for everyone to give additional gifts to the organization. Some ideas include:

- ❑ **Memorials** – Funds given in memory of a loved one. Friends groups need to be thoughtful about how to handle these type of donations. Remember you’ll be dealing with people who are grieving, so you’ll want the details of your program in place before you ask for donations. Plan to discuss with your Refuge Manager how you’ll memorialize an individual (i.e., you won’t want to have plaques everywhere on the refuge).
- ❑ **Stock** – A number of groups have found donations of stock to be a valuable source of contributions. Donors benefit from the tax deduction (they can deduct the appreciated value of the stock and pay no capital gains tax) and the group benefits by receiving stock that can either bring immediate cash or be reinvested for use at a future date. To set this program up, a group first needs to establish a brokerage account.
- ❑ **Celebrations** – Gifts given to honor a person or event, such as a birthday, Mother’s Day, Valentine’s Day, and Christmas. These provide great gift giving options for those folks who “have everything.”
- ❑ **Wish Lists** – Create a wish list of what your group needs for all of its activities. You can publish this regularly in your communications to your supporters. In addition, you can have your list ready for those folks who want to make a thoughtful donation to your group, but want it to match their specific interests. Wish lists can include requests for funds for a variety of activities, and for goods or services needed by the group such as equipment, supplies, printing, design work, and program materials. Similar to cash, donors can take a tax credit on the value of donated goods.

- ❑ **Special Appeals** – Your group could ask for special donations at year's end (to celebrate your successes) or as you begin a new program or project. These appeals would request additional donations beyond a member's annual contribution.
- ❑ **E-giving** – Set up a giving program through your Web site (e.g., endowments, capital campaigns, etc.). You can also use the Web for memberships and sales.

For all these programs, you'll need ways to recognize the gift, both to the donor, and to whom the gift honors, if applicable. For example, you must be prepared to thank the donor for a birthday gift *and* send a birthday greeting to the person in whose name it was given. In addition, you'll want good record-keeping systems to handle these donations appropriately (e.g., you won't want to mix your membership data with memorial gifts and end up asking for inappropriate membership renewals).

Capital Campaigns:

Many Friends groups are interested in raising funds to build new or expanded visitor centers and other major projects. Organizing a capital campaign to fund these projects will require a special fundraising effort by your group. All the work you've done to build relationships, organization visibility, credibility and accomplishments, become even more critical to succeeding at a capital campaign. While a capital campaign is a huge undertaking, Friends can and do succeed in their efforts. The "Ding" Darling Wildlife Society's story included in this section provides some useful "food for thought" on getting started.

Estate Planning and Planned Giving

Author's note: Many thanks to Frank and Arlene Wolff who provided this summary.

There are a wide variety of planned giving options! In setting up a program, Friends groups are advised to work with an attorney who has a contemporary practice in estate and "death-tax" law. The following list of giving opportunities outline the tax advantages that accrue to donors from the standpoint of Federal taxes. Several states also have inheritance taxes of one type or another and readers should be advised to consult estate tax lawyers of other practitioners in their own states for advice on state tax obligations which may exist.

- ❑ **Bequests from your estate:** Donors name the charity of their choice to receive a specific amount, a percentage, or the residue of their assets transferred by their will or revocable living trust. Gifts to benefit the charity can also be made outside a will. Any financial arrangement that designates a death beneficiary can be adapted as a "bequest." These include life insurance death benefits, financial accounts, and retirement savings plans such as TRAS, pensions, and 401(k) plans.
- ❑ **Gifts of Security:** A donor transfers some assets to the charity of his/her choice and receives income for life with an eventual gift to the charity. The federal government encourages life income charitable gifts by giving significant tax benefits: income taxes right away and estate taxes later. From a tax perspective, the best asset a person can give to a charity is a gift of securities or other assets. Donors can: (1) deduct the full fair market value of the appreciated assets-if owned more than one year, and; (2) save again by avoiding all capital gains taxes on their "paper profit." This also applies to mutual fund shares and the tax benefit is the public redemption value of the shares.

Estate Planning and Planned Giving (contd)

There are a number of plans available two of which are:

- **Charitable Remainder Trust:** A donor irrevocably places money or property with a trustee, with instructions to pay someone (probably the donor) income, generally for life. The income will be a set percentage of the trust's value, which may change from year to year, or can be a fixed annuity. When the person receiving the income dies, the remaining property passes to the charity.
 - **Charitable Gift Annuity.** This is a contract in which a donor exchanges a gift of cash or securities for a guaranteed, fixed income each year for the rest of his/her life. This plan offers advantages that include: (1) income for life, at attractive payout rates for one or two lives; (2) tax deduction savings - a large part of what is donated is a deductible charitable gift; (3) tax-free income - a large part of the annual annuity payment is tax-free return of principal; (4) capital gains tax savings
- **Pooled Income Fund:** A number of friends of the charity contribute money or property to the fund, with each contributor retaining an income interest for his or her life - or the life of any beneficiary he or she may designate. All property contributed to the fund is "pooled" together and invested by a skilled trustee. The primary investment aim is a good income - which is divided each year among the contributors. Only upon the death of the income beneficiary does a particular contribution to the fund become the property of the charity.
- **Life Insurance Designation:** The proceeds are payable to the charity. A donor can name the charity as a contingent beneficiary for all or part of the benefit. A better idea may be to transfer actual ownership of the policy to the charity, or buy a new policy for the benefit of the charity. Such a gift would entitle the donor to an income tax deduction and future premium payments would be tax deductible.



FoBB Friendship Quilt

Friends of Black Bayou NWR, Louisiana

Author's note: This notice, written by Amy Ouchley, first appeared in the Friends of Black Bayou newsletter, The Anhinga Flyer (Spring 2000). Thanks to Amy and the Friends for contributing this piece and offering a wonderful suggestion for a wonderful fundraising program that will raise \$6,000!

Over a year ago FoBB members conceived a unique fundraising project. After seeing a beautiful quilt with names embroidered on it hanging in a museum in Nova Scotia, Bob Eisenstadt and Ann Smith suggested the use of a similar project to raise money for renovation of the house at Black Bayou Lake NWR. The FoBB "FRIENDShip Quilt" was born.

Lil Griffin, FoBB member and avid quilter, launched the project by creating a beautiful design centered on the FoBB logo and surrounded by 120 blocks of differing shades of yellow (sun), green (growing things), brown (earth), and blue (sky and water).

As in most artistic endeavors, the making of a quilt has many labor-intensive steps. Local artist Glen Kennedy was recruited to design the central medallion that will be surrounded by the quilt blocks. He used Jim Moore's original FoBB logo as his inspiration and drew a scene including trees, water, birds, and wildlife.

Local quilting artist Mary Crew, a founding member of the North Louisiana Quilters' Guild, took that design and used a technique called appliqué to form the beautiful center of the quilt.

Lil has already completed the cutting and piecing of the 120 quilt blocks with an array of heirloom fabrics. The yellow, green, and brown blocks have an area where a name (or a couple's name) can be embroidered, while the blue blocks have spaces for four names.

The price of each block is \$50. To purchase a block (with one or more names of your choice embroidered on it), contact [FoBB]. ***Remember, these are limited edition blocks. There are only 120 blocks on this quilt, and each one is different. Call now if you want your name on the quilt!***

As soon as the blocks are sold, members will begin the embroidery. After all the names have been embroidered, the quilt can be put together. Then it will be layered with cotton batting and lining and finally quilted. The end result will be an extraordinary heirloom quilt that will hang in the Visitors' Center at Black Bayou Lake National Wildlife Refuge.





Fundraising Surprises — The Pleasant Kind

Friends of Rhode Island Refuges, Rhode Island

Author's Note: Many thanks to Fran Bodell, Friends of Rhode Island Refuges, for submitting this piece.

The following fundraising stories were experienced by a group that is just over a year old. None of the Board members are peers (or admit to being peers) of folks in the corporate world or contributors of large sums (we are working on this however). We'd like to share our beginner's luck with others and look forward to trying ideas from other groups as well.

— Fran Bodell, Friends of Rhode Island Refuges

Memorial Gifts

Before we had our 501(c)(3) tax exempt status, a family wanted to give a memorial gift of \$2,500 toward an observation platform at one of the five refuges in our complex. They decided to wait until the site and plans were available for the platform before they donated this large a sum. We have been working with the refuge staff to make this happen. In the meantime, we have been sending newsletters to the family to keep in touch. When they saw we had received our 501(c)(3), they joined our Friends group at the \$250 plus Patron level. In addition, one family member sent in a request to his place of employment for a matching contribution. The total contribution was just over \$700!

This year we received memorial gifts from two other families totaling approximately \$900. These funds were directed to a specific refuge or project according to the donor's wishes.

Proud Parents

Our Friends group sponsors and coordinates the Federal Junior Duck Stamp Contest for the state. This year we had over 850 entries, some of which were wonderfully artistic and fun. We chose a high school artist's representation of a particularly colorful Ruddy Duck and made it into a T-shirt and mouse pad to sell and raise money for next year's Jr. Duck Stamp Program. In the first month of sales, we raised enough money to cover our expenses just from the family of the artist!





Keys To Building A Successful Capital Campaign

“Ding” Darling Wildlife Society, Florida

As they embarked on its plan to raise private funds to expand the refuge’s existing visitor facility, members of “Ding” Darling Wildlife Society discovered that managing a capital campaign involved much more than anyone had imagined. Yet, despite the challenges, this group managed to raise \$3 million in five years and reached their goal of building a facility that could meet their growing needs and the needs of the refuges.

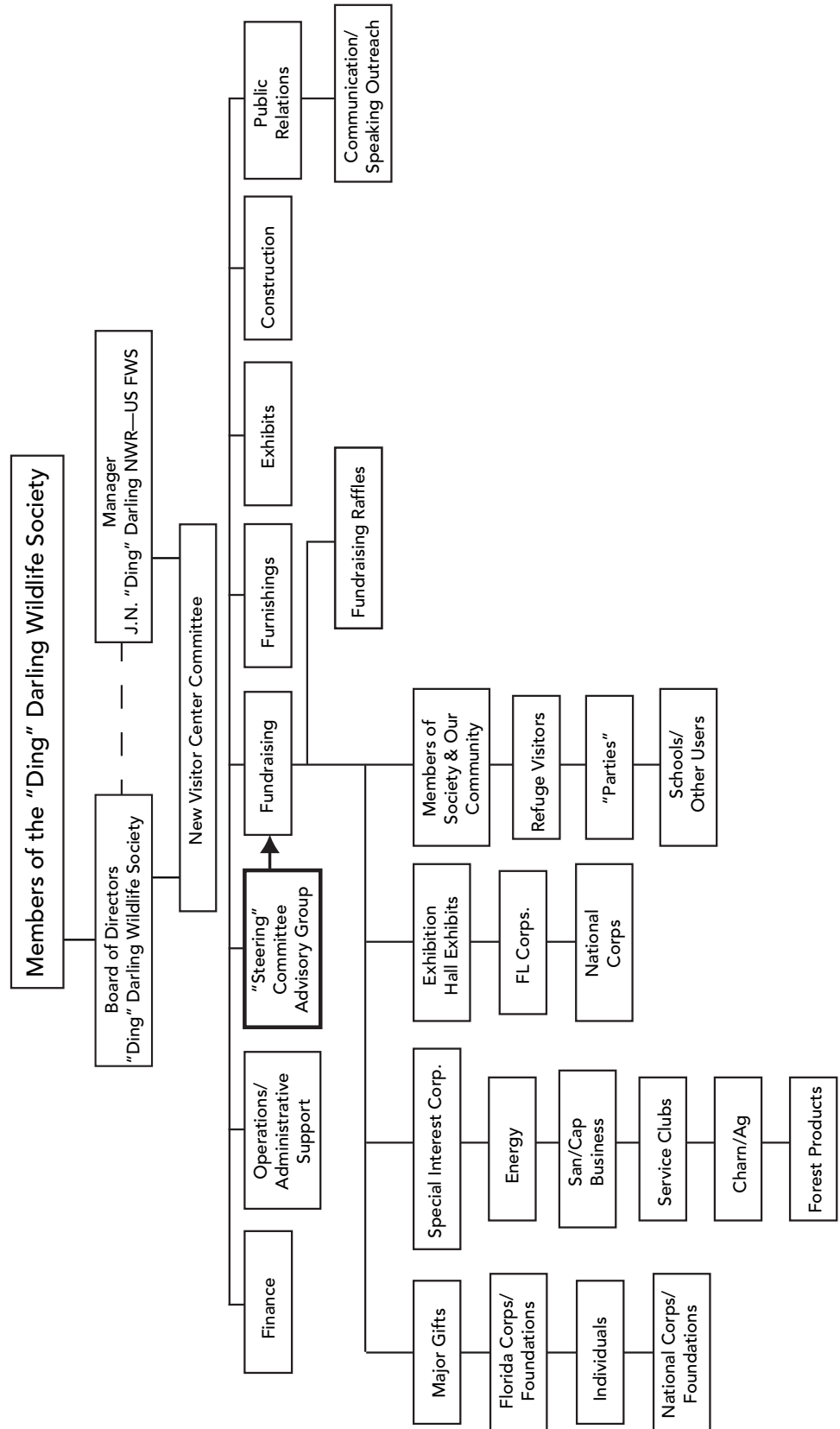
“Ding” Darling Wildlife Society is much like other Friends groups around the country, made up mostly of people who care passionately for the refuge and who are dedicated to its protection and preservation in perpetuity—people who are gifted educators, biologists, activists, and birdwatchers. Many of our groups, like the Society, have succeeded at fundraising on a local level, through our bookstores, memberships and events. Yet, few of us can claim to have the skills and contacts it takes to raise a million or three.

It turns out that luck was with the Society, as they had a member who lived part-time on Sanibel Island with the necessary skills. Gene Steele was retired from 3M Corporation after spending a number of years developing and managing the 3M Contributions Program and serving as an officer on the 3M Foundation Board. This foundation was responsible for providing approximately \$20 to \$22 million each year in funds and the contributions program provided services and products nationally and internationally. Gene knew the business world and understood corporate and foundation giving. He agreed to join the Society’s Board of Directors to help them in their fundraising efforts.

When asked what he would tell other groups who are considering a capital campaign, Gene listed a few keys and lessons learned by “Ding” Darling Wildlife Society:

- ❑ **Start with a plan and share it.** You need everyone to be clear on what it is you’re planning, how you’ll achieve your goals, and what you expect of the board. The Society didn’t have much of a plan at first. They knew how to knock on doors and have coffee parties, but they didn’t know how to develop the kind of fundraising plan they needed for a capital campaign of this magnitude.
- ❑ **Develop a Case Statement.** This is a key step and must be done with the involvement of everyone on the board. The statement includes information on your vision and mission, immediate objectives and long term goals. Gene notes that it is a living document that changes as you move through your campaign.
- ❑ **Get Organized.** Gene created a fundraising manual that included everything they would need for the campaign, such as sample letters of request, sample thank you letters, detailed breakdown of the building costs, ways donations could be acknowledged, and the Case Statement. In addition, the group established a committee that would handle all aspects of the campaign (see chart).

"Ding" Darling Wildlife Society
 Structure of the New Visitor Center Committee



- **Examine your board's connections and ability to give.** A campaign of this magnitude requires board members who are able to donate, make connections, and sell the program. The ability to find and connect with major donors is key to a campaign. The Society's Board, being made up of former teachers, birdwatchers and the like, didn't have members who could provide the large donations needed to start the campaign, nor did they have the contacts. In addition, even members who had some contacts didn't feel comfortable asking for donations. For these reasons, Gene established an Advisory Committee that was initially made up of the four officers. Members of this Committee went together into the community to find people who met two criteria: first, they were able to give, and second, they had a network into which they could tap and connect the group to others who could give. These folks were added to the Advisory Committee. Each Committee member donated a large sum to the project, provided connections, and helped sell the program.
- **Start with the big stuff.** Focus on the \$25,000 to \$50,000 lead donations first. Once you have a number of major donations, you can then announce the campaign to the general public and get them involved. Gene notes that it's a snowball effect, the more money you have, the easier it is to get more. People begin to see your successes and they want to contribute when at first they may have hesitated. The Society's experience was that once they got one major donation from a couple in Omaha, Nebraska, they started making connections and receiving more large donations.

The Society ran into a number of obstacles along the way. The biggest one being the perception that the Society was raising money for the Federal Government. No one wants to contribute private funds toward something they believe has been paid for by their tax dollars. Another issue was the concern by locals that the Society was building a "monstrosity" and the building would attract more tourists—"we don't want more tourists!"

In both cases, education, publicity and perseverance were the Society's keys to success. First, they successfully built the case that donations were being made to the *Society* (not the Fish and Wildlife Service) to accomplish *Society* goals.

The Society's goal for the building was to offer quality environmental education, especially to the 4,000 Lee County school children and the 70,000 to 80,000 youngsters who visited with their parents each year. The Society reasoned that donors would be investing in the future by contributing to the facility. They maintained that the future of our wildlife and natural resources will depend on instilling a value of habitat and wildlife preservation in our children today—the decision-makers of tomorrow. The new facility would be used toward this important end. They also made it clear that "no tax dollars" were involved in the building. In fact, the building is now staffed solely by volunteers with the exception of one refuge outreach employee.

The group used media and their quarterly newsletters to get their message out. Now that the facility is built, they can simply use their presence to educate the public. Peo-

ple are noticing the group's accomplishments and are saying, "Ah, now I get it!" There are still folks coming forward to make a donation, some of whom Gene has been working with for more than three years! So one more lesson learned is don't give up on anyone. Take the time to keep potential contributors informed and involved and there may come a time that they decide it's worthwhile to make a donation.

Where did they get their donations? The pattern was similar to any fundraising effort: 91% individuals, 7% public and private foundations, and 2% corporations. On corporations, Gene notes that these are hard to get unless the company has some connection with the community. They give where their employees are, as they want to have local involvement in a community. This is also true for many foundations—you need the personal connections.

Was all the time and energy worth it? You bet. Not only has the group raised its profile in the community ("They did it!") and met its goal for serving the refuge's constituents with a superior facility, their bookstore sales have skyrocketed which will allow them to give more support to the refuge than ever before.



Cooperating Associations

The US Fish and Wildlife Service has a legal tool that allows nonprofit organizations to open a sales outlet on a National Wildlife Refuge. The nonprofit group signs a Cooperating Agreement that defines the relationship between the Service and the organization. As Cooperating Associations, groups use their stores to support and reinforce the missions of their refuges. In addition, they provide tremendous assistance to their refuges by directing sales profits into various refuge projects and programs.

Many Friends groups have found that operating a sales outlet is a highly effective method of raising funds, with sales income quickly becoming an important source of dependable funds for their projects. In addition, this fundraising avenue offers the opportunity for a Friends group to gain exposure and build business skills, both of which help the group achieve its goals.

Like any business, however, there are highly profitable refuge sales outlets and those that are marginal. Before you pursue this avenue, you'll want to position your group to succeed. It's important to understand that not only will profits depend upon the refuge location, visitation, and community, but many other factors play a role, such as good business planning and management, product quality and relevance to customers, quality of customer service, and the appeal of the sales space.

In this section, we'll review the basics to getting started and offer tools to help your group succeed as you take on the role of "shopkeeper." One of the first questions you'll want to ask is:

Why Start a Refuge Sales Outlet?

The benefits of starting a store on your refuge are many, including: (Flanagan, 1995, Klein, 1996, Simpson, 1994):

- ❑ You will support the refuge's and Refuge System's mission and reinforce refuge and US Fish and Wildlife Service educational and interpretive messages through the sale of relevant books and other materials.
- ❑ Because products sold will relate directly to the refuge and its mission, your store will enhance the visitor experience.
- ❑ You can depend upon a reasonable amount of regular income that can be used to support refuge activities.
- ❑ You will acquire skills that are useful in all aspects of fundraising and financial and organization management.
- ❑ Your group will be more visible and the sales outlet can project a positive image for the refuge.

- You can start small and build your inventory and staffing as sales increase.⁴
- You can find the right job for nearly every volunteer.
- You will be in contact with more visitors through sales interactions and reach beyond your basic membership with sales to the public.
- You can build on your partnership with refuge personnel by having more direct interaction and shared decision-making.

What Are the Risks?

While the benefits of starting a sales outlet are many, there are risks as well, including: (Klein, 1996, p. 266.)

- The business could fail and the board would be liable for debts incurred.
- A poorly run business could tarnish the organization's reputation.
- If profits are marginal, the business could become a financial and emotional drain to the group.
- A marginal business could also be a resource drain, overextending the group and interfering with the group's ability to achieve other goals.

Why Do Businesses Fail?

Nine out of ten new businesses fail. By understanding the reasons, you can begin to build success into your new business. The most common reasons include (Olenick, 1991, Klein, 1996):

- Inadequate business experience and poor management;
- Inadequate funds to start up and to ride out any rough weather; (under-capitalization);
- Inadequate planning;
- Inability to respond to market conditions;
- Underpricing of goods.

4. Reviewer Art Krival offers this note: "Starting small is important and merits some emphasis, if only because mistakes made in a new large enterprise can be costly and devastating, while mistakes made in a new small enterprise can be primarily instructive." He further notes that your prognosis for success should be pretty good if: you start small, are given space at the refuge (thus having little or no overhead costs), have volunteers operate the store (no personnel costs) and if your refuge has a predictable visitation.

Planning for Success:

There are many Friends groups that got their start as Cooperating Associations, with the business venture being their primary activity. Over time, these groups have built their outlets and their organizations into highly successful entities. Other groups started their businesses sometime after they established their organization. Regardless, there are a number of criteria that will make a difference to the long-term success of the group and its business venture. Klein (1996, p. 264) suggests that these elements should be present before starting a small business:

- ❑ A strong donor base;
- ❑ Regular special events;
- ❑ An ongoing program of recruiting new donors;
- ❑ Financial stability without an immediate need for the money from the small business;
- ❑ People committed to the idea of a small business and who themselves own or have owned successful small businesses;
- ❑ Start-up capital, either in-hand or borrowed.

Getting Started:

If you and the refuge staff decide that establishing an outlet is right for the group and the refuge, there are a number of steps you can take to get started (Flanagan, 1995, Klein, 1996):

- ❑ **Consult the experts.** You may decide to create an advisory board that includes some of the following: successful small business people in the community, a lawyer, an accountant with profit and nonprofit experience, an insurance agent, a banker, people who have experience in marketing, advertising, public relations, retail, bookkeeping, selling, personnel, and organizing volunteers. (Flanagan, p 126) Alternatively, if creating such a board proves too difficult to manage and is impeding your ability to get started, you might seek the advice of these experts on an individual basis. In the longer run, you'll need a permanent bookstore committee that will be responsible for managing all aspects of the bookstore. Members for the committee may come from, or be identified by, members of the initial advisory board. Note also that a refuge liaison will be on the committee since all products must be approved by the manager or his/her designee as part of the Cooperating Association Agreement.

- ❑ **Get your financial and legal business in order.** Identify financial people to offer advice on financial planning and getting start-up funds. Work with a lawyer and accountant on meeting IRS regulations.
- ❑ **Do some research.** Talk to other nonprofits about their experiences. Visit Friends groups that have refuge sales outlets. Read some books. To help you determine your market niche, visit local stores to see what products they sell and talk with business owners (you don't want to be in direct competition).
- ❑ **Seek guidance from the Small Business Administration (SBA) and your local Service Corps of Retired Executives (SCORE) chapter.** The SBA has training courses and a wealth of materials available to assist small business owners. Your local SCORE chapter may have expert resource people available who can provide consultation at no cost.
- ❑ **Test the idea.** Consider offering products for sale through your newsletter or at local events, such as T-shirts or totebags. This step will give you ideas on how easy or difficult it will be to sell these items and the kind of profit you are able to make. It will also give you some direct business experience that will be helpful later on.
- ❑ **Identify one person (or a committee) who will manage and be dedicated to making a profit for the business.** At first, this may be done by one or more volunteers, but as the business grows, it may become a paid staff position. This person (or committee) will need a job description written by the board and will need to develop a monthly workplan that can be reviewed regularly and changed as work progresses.

Your Store:

There are lots of questions to consider as you plan your store: What will you sell; Who will run the store; How will you handle the money? In a presentation given at a Cooperating Association training workshop, Cheryl Simpson (1994) offered some tips for getting started:

- ❑ **Know your audience.** Are they lower or middle class, younger or older? What products might interest them (e.g., kids items, natural history books, or even road maps) and what prices will they be willing to pay?
- ❑ **Space:** You'll need space for displays, sales transactions, storage for inventory and a safe, and a workspace for volunteers and staff. Obviously, the amount of space you have available will determine the number of items you'll be able to sell. Take this into consideration as you begin planning your inventory and designing display areas. Consider how you might maximize space for the greatest selling capacity.

Volunteer Jobs for a Bookstore

This list was compiled by Molly Krival, "Ding" Darling Wildlife Society, from a presentation given by Mike LeBaire, former Executive Director of the Conference of National Park Cooperating Associations and founder of New England Booksellers Association, at a FWS Cooperating Association Training Workshop held in Denver, Colorado in 1996.

- Arrange sales items
- Place bar codes on items to be displayed or stored
- Receive and check items ordered to be sure they are what was invoiced.
- Write and record payment checks according to a bill payment plan.
- Double checking with canceled checks that payment was received.
- Inventory items (count the items) every four to six months and compare results with register tapes of coded sales.
- Periodically assess which items sell well, moderately, or poorly to advise on re-orders.
- Keep a record on the time needed to receive orders after they're made so that re-orders can be sent on time.
- Plan sales for items that are going out of date or not selling.
- Plan artist or book signings for new or special items.
- Associate items with some refuge feature (e.g., buffaloes) for special attention.
- Dust items and shelves and return misplaced items to their correct location.
- Know the merchandise, offer customers help and greet them warmly.
- Review proper use of the cash register.
- Tally cash register at the end of the day.
- Evaluate books to be considered for sale using an assessment form developed by the bookstore committee.

- ❑ **Inventory:** Items should be of high quality, reflect your group and the refuge, be educational or interpretive in nature, and must be approved by the refuge manager. Note that the IRS and certain states have regulations on nonprofit sales (certain sales income may be taxable), so you'll want to work with your lawyer and accountant on tax-related issues.
- ❑ **People:** Consider the number of people you'll need to staff the store during business hours. They will need adequate training and guidance. A training manual and job descriptions and policies will also be needed.
- ❑ **Administration:** You'll need to get your paperwork in order including a signed cooperating association agreement, state registration as a nonprofit (required in some states), sales permits, insurance, credit card account, banking, bookkeeping, and accounting systems, and inventory management systems to name a few.

The Cooperating Association Agreement:

In order to sell goods on a refuge, a Friends group must enter into a legal agreement with the US Fish and Wildlife Service (FWS) called a Cooperating Association Agreement.⁵ Each of the seven FWS Regions has their own policies regarding the agreement, but there are some general rules that apply.

First, the agreement must be reviewed and approved by the Regional Office Solicitor and/or contracting office. Signatory authority differs by region; in some regions, the Regional Director must sign, in others, your refuge manager may have this authority as long as the document has been approved at the regional level.

The agreement describes the relationship between the Cooperating Association and the refuge (who is responsible for what). It also stipulates a number of requirements that the group must meet as it enters into an agreement with the FWS (see Appendix E). Because this is a legal document, you'll want to negotiate any changes needed and be sure that your group can meet all its requirements before you sign the document. Also have your lawyer review the Agreement before you sign it.

Some of the requirements listed in the Agreement are as follows:

- ❑ The refuge and the group must cooperate in the planning and design of merchandise to be sold.

5. Signing a Memorandum of Agreement is a good idea, even if your group isn't planning a sales operation. Among other things, this document can define the mutual agreement between the Friends and the Refuge for how Friends funds will be spent on Refuge projects. Reviewer Fran Bodell notes that a signed agreement was requested by the IRS when it granted the Friends of Rhode Island Refuges their tax-exempt status.

Tips on Merchandising

Compiled by Molly Krival, "Ding" Darling Wildlife Society, from a presentation given by Mike LeBaire, former Executive Director of the Conference of National Park Cooperating Associations and founder of New England Booksellers Association, at a FWS Cooperating Association Training Workshop held in Denver, Colorado in 1996.

“

The basic principles of merchandising are all corollaries of one axiom: "Make it easy for the visitor."

— Mike LeBaire

”

❑ Attracting customers:

- The first goal of the salesperson is not to sell, but to allay visitor anxiety: greet them, chat them up, and then show them the sort of things you sell.
- Customers are attracted by people, light, quantity, and movement. If the store is empty, the sales person should wander around like a customer. Shelves should be crammed (plan shelving so that multiple copies of each item are displayed rather than stored away). Focus lighting on items with especially bright light on back wall items. The back is also the best place for showing a video that's for sale: it attracts the customer fully into the store and allows him or her a sample view.
- Avoid barriers between customer and salesperson. Keep counters about 20 inches deep.

❑ Choosing Inventory:

- Choose what you sell by knowing what your visitors want as well as the quality of the produce and its relevance to the refuge.
- Because not everyone learns by reading, include spoken and nonverbal materials (e.g., bird songs), moving images (e.g., videos), kits to build, CD ROMS, and interactive games.
- Consider providing some convenience (e.g., water bottles) and self-actualization (e.g., finding oneself in the wild) items.

❑ Displays: Make it Easy for the Customer!

- Make items easily accessible: display goods in the "easy zone:" height the upraised hand can reach and depth no lower than the knees.
- Display posters tastefully framed with a clear sign noting where the unframed ones can be found and how much they cost. Try to place the rolled posters near the display and use color coding and numbers to distinguish them from one another.

Tips on Merchandising (Contd)

- Avoid ambiguity: if you show a sample item, have a sign that clearly tells the customer how to get a copy. If you display a special item on a stand, have lots of copies available at the display.
 - Dimensionality: When the cover of a book gives information, it is best displayed against a wall. Three dimensional items are best on island fixtures where customers can see all around them (e.g., a model to make).
 - Sales of videos triple if people can see or hear them. The best viewing is in an auditorium, or the back of the store, but note that people are hesitant to use ear phones.
- ❑ Books:
- Provide more than one book on each subject and vary the selection by level of sophistication, with most being intermediate. Note that some coloring books are too difficult for kids.
 - Provide books that are both site specific and of general interest. For example, if you offer them, visitors will buy books on local birds and for their home area as well.
 - For foreign language readers, insert a pamphlet in the language that interprets the books. Computers at universities have programs that automatically translate and are quick to use. Then have a foreign language speaker reduce and correct it. This greatly increases sales.
- ❑ Economics:
- Place cheap materials (postcards) near similar subject books; if the customer can't afford the book, perhaps s/he can afford the cards.
 - Biggest sales are for items that cost no more than \$19.95.
 - Having something more expensive for the expert makes the items one price range down sell better.
- ❑ Signage:
- Make signage large and at eye level: size and placement is especially important for the elderly.
 - Vary style and colors, and if possible, coordinate these with each exhibit.
 - Use shelf lip hinges for category signs with letters at least 1/2 inch high (36 point print)
 - Different types of signs are needed and will include:
 - *category signs (e.g. for books);*
 - *way finding signs (Open!);*
 - *credit cards, checks, cash accepted, return policy;*
 - *promotion signs.*

Tips on Merchandising (Contd)

- ❑ Rules of Theme:
 - Organize items by subject, not by type or publisher and use big identification signs for major categories, smaller signs for subcategories.
 - There are four ways to shelve items (left to right):
 - *Specific to general (e.g., local birds, state birds, North American birds);*
 - *Best selling to slower selling;*
 - *Simple to complex;*
 - *Lowest to highest price.*

- ❑ Items to be sold must be of an interpretive and educational nature and must reinforce the goals of the Service.
- ❑ The Association must submit an annual fiscal report and written summary of its activities to the Regional Office each year.
- ❑ The group must carry public and employee liability insurance, and is advised to insure its inventory, fixtures, and equipment from hazards such as fire, windstorms, floods and the like.
- ❑ The Association must be a nonprofit, tax exempt organization (501(c)(3)). Its Articles of Incorporation and by-laws must comply with requirements of the State in which the Association is incorporated.

Need Help?

Local and national resources are available to Friends groups who need help getting started as a Cooperating Association:

- ❑ The FWS has written guidelines for Cooperating Associations and standard agreements are available. To learn more, contact your regional and/or the national Refuge Support Group Coordinator at (703) 358-1744.
- ❑ Visit or contact a local Cooperating Association in your area. Many experienced groups are quite willing to spend time helping a new Cooperating Association get started.
- ❑ Start-up funds may be available in the form of a loan or grant from a number of resources. Some foundations and organizations offer seed money for start-up groups and loans may sometimes be obtained from other Cooperating Associations.

- ❑ There are a number of excellent sources for purchasing your inventory. However, as of this writing, no central listing is available. Your best bet is to talk with other Cooperating Associations to get their recommendations.
- ❑ The Association for Partners of Public Lands (APPL) is also an excellent resource for Cooperating Associations. They hold a biannual convention, workshops, and have a library of materials that may be useful to groups getting started.

As a final note on getting help, Art Krival of the "Ding" Darling Wildlife Society offers this story:

The following little bit of history won't work everywhere, but it might stimulate some thinking about unusual sources of financial support. The "Ding" Darling Wildlife Society started its bookstore very soon after organizing. Several members of the board were members of local service clubs: Rotary, Kiwanis, Lions, and others. The first president of the board was able to make a presentation about the new non-profit in town to the service clubs, the Chamber of Commerce, and other local organizations in which he included a request for donations to get the book store started. He received several hundred dollars and a bookcase. The first cash register was a cigar box. Six years later, when Molly and I became volunteers at the refuge, there were two large bookshelves and a real cash register and a growing enterprise.

The Bookstore Committee

“Ding” Darling Wildlife Society, Florida



“Ding” Darling Wildlife Society recently opened its new education center, and with it, a new store. Their previous sales outlet measured 270 square feet; now they have 800 square feet. With the new space and inventory, the group is experiencing a 100% increase in sales! Art Krival, Bookstore Committee Chairman, attributes their

success to the quality of items and their relevance to the refuge and its mission.

The Society is serious about its inventory standards (see the group’s Book Sales Quality Statement in Appendix D). Its Bookstore Committee understands that a fundamental purpose of the store is to support the mission of the refuge and reinforce its educational and interpretive messages. They choose their items carefully, ensuring that all products are relevant and meet the group’s and refuge manager’s standards.

Establishing an effective Bookstore Committee is a key element to managing a refuge store. The role of this committee is to decide, with the manager’s approval, what products will be sold. The Society’s Bookstore Committee focuses its activities on two primary areas: maintaining quality and generating products.

Product Quality:

Art notes that the most important principle in product selection is its relevance to the refuge’s and refuge system’s mission. “Everything we sell must have some relation to that purpose. Every product must have something to do with habitat, wildlife, the refuge, the area or the US Fish and Wildlife Service and National Wildlife Refuges. This is a pretty rigorous set of principles.” The Society’s Committee rejects lots of books (some are inaccurate!) and their process “is slow, but our publishers and distributors have gotten used to it.”

For many bookstores, space is a real issue. Often there isn’t much room and if a group wants to add something, they have to take something off the shelves. With the new facility, the Society had a different challenge: how to fill all the new space with products that met their standards. In addition to the product selection criteria already in place, they decided to add products that would relate directly to the new visitor center’s exhibits. For example, the first exhibit that was installed is about the National Wildlife Refuge System. The store features books related to this subject, with authors such as Rachel Carson, Aldo Leopold, and “Ding” Darling. Art notes that “we may not sell a lot of these, but people comment that the store has books they don’t see elsewhere. Our huge wall of books is what brings them back over and over.” Given the success of this approach, the group will offer books related to all exhibits as they are completed.

Of course, the group also offers a variety of other things, such as hats, shirts, and craft items. Yet, each of these items must meet the group’s test for quality. Art says, “We don’t have any junk,” (e.g., gold plated shot glasses and other such trinkets).

While most groups won't have the same challenge the Society had (i.e., filling triple the original space), the principles of product selection will be the same for everyone. Your Bookstore Committee's job is to ensure that everything you sell is relevant to the refuge and its mission. Product selection will be the foundation for your store's success: "What goes on sale is more interesting to customers if it's related to the experience they just had or will have on the refuge."

Generating Products:

Another role held by the "Ding" Darling Wildlife Society's Bookstore Committee is to generate products for the store that are unique to the refuge. For instance, a volunteer who is a professional wildlife photographer was asked to organize his colleagues to put together photos for postcards. In another example, the Committee encouraged the Newsletter editor to compile some very good articles as a basis for a very good book about the refuge and its wildlife. And finally, a volunteer who gives birding tours was asked to compile his notes into a birding guide to the refuge's Wildlife Drive. The group is now looking at developing a similar area birding guide.

The committee continually seeks new ideas for products that visitors will appreciate and finds a way to create these products as needed. In fact, Art says he "snoops" in the store, "eavesdropping to find out what people are responding to."

Committee Make-Up:

To get a bookstore committee started, Art suggests that groups find a few folks (no more than five to start with) who have the same commitment to the refuge. These folks must be able to spend the time needed and really want to work on the committee. He notes that the backgrounds of the Society's committee seems rather unusual for such a responsibility: woodcarver, retired public relations expert on Madison Avenue, former schoolteachers/grandmothers, academician, computer expert, high school science teacher/amateur photographer, and a retired industrial psychologist. The key to this group's success is that committee members have the same interest, which is "to get products in the bookstore that will mean something to visitors when they visit." In addition, committee members are all refuge volunteers—they work at the visitor desk, in the bookstore, on the drive—there is no one whose only refuge-related function is the Bookstore Committee. "They all know the refuge and this is important, because we get a great deal of feedback this way."

The Role of Refuge Management:

All products sold on a refuge must first be approved by the manager or his or her designee. Beyond the manager, the Committee members work closely with the Outdoor Recreation Planner (ORP), and sometimes they'll check with other personnel for their opinion. For example, they might ask the Biologist about whether or not a product is appropriate for the refuge. If your group follows the Society's "formula," you'll likely

be in agreement with management—most of the time. While the Society’s process moves fairly smoothly, Art notes, “We’ve had a few disagreements with management; and they “win,” of course. We respect the staff’s professional judgement.”

Make it Fun!

On a final note, Art underscores that: “Its got to be fun. You’re going to be making money, but you have to feel good about what you’re doing.” The rewards for the Society’s members have been great. They are providing a service for visitors and raising badly needed funds to help the refuge accomplish its goals. But, perhaps most importantly, the group is supporting the mission of the refuge through its store. The sales outlet is simply one more tool used by the Society to educate the public about the refuge and the National Wildlife Refuge System.





What It Takes To Set Up A Bookstore:

Friends of Blackwater NWR, Maryland

Authors note: My sincere thanks to Ron Tillier who composed the following thoughts on what a group needs to consider as it sets up a new bookstore

The cost of setting up a bookstore is about \$8,000, but can be less:

Actually, in the beginning, you can keep your costs to a minimum. While it would be nice to have a lot of the amenities of a full-fledged store, such as a cash register and an automated inventory control system, many of us started out modestly. One group recently determined it needed about \$8,000 to get started. This is not an unreasonable amount of money to begin a decent sized store, but you could do with significantly less if volunteers can provide shelving and displays. Anyone starting a store should contact other refuges for financial assistance. We were started that way, and we have funded two other stores in this way.

On vendors:

One of the most important things for a group to obtain is a list of vendors of items that a Refuge will typically want to carry. Any refuge with a bookstore will be willing to provide such a list. When first starting out, groups may want to explore if it's possible to utilize the quantity purchasing power of a larger, established Cooperating Association.

What will you sell?

Books are a mainstay of refuge stores. A good selection of books on bird identification, birding and related subjects are always in demand. The next best item are things like souvenir T-shirts and sweatshirts. The space allocated to the group by the refuge will largely dictate what's possible. Most refuges can only afford to give you a fairly restricted space mandating that you choose items carefully. Also, refuge managers or their designees must have approval over everything you sell.

How much profit can you expect to return to the refuge?

Profit, of course, is entirely dependent on how large a store you have and the selection of merchandise. It is common to markup items at about 100%; however, this is not always possible, and we find that our average markup is about 80%. Blackwater is grossing about \$60,000 a year and we estimate we have been returning about 25%

of that to the refuge.⁶ We used to spend about \$15,000 a year to pay for a part-time manager through an employment agency. However, we now have a volunteer managing the bookstore and believe we will be returning closer to 50-60% to the refuge in the future.

You'll need space to store your inventory:

Hopefully, the refuge has provided you with storage space; however, most bookstores eventually find that they would rather maximize selling space and opt for storage elsewhere. This can be expensive, but there are options. We, for example, have been renting a trailer at approximately \$120 per month. Another option, with your manager's approval, is to construct a storage shed which could be built by volunteers over a weekend.

What you'll need for insurance:⁷

There are several different forms of insurance that your group will want to consider:

- ❑ The Cooperating Association Agreement requires that groups carry General Liability insurance.
- ❑ Hazard insurance to protect such things as your inventory, equipment, and fixtures, is highly recommended, and is not expensive.
- ❑ Officers and Director's Liability Insurance (also called Errors and Omissions Coverage) insures board members. An insurance "expert" who spoke at a FORMA (Friends of Refuges Mid-Atlantic) meeting noted that Board members might be covered under the auspices of an "umbrella" policy in their homeowners insurance. This person did caution us to check with our carriers to determine what actions would be covered. I did that with mine, and doubled my policy coverage to \$2 million and I'm comfortable with that. This person also cautioned, that as soon as you "hire" someone, then you will need insurance for each Board Member, as well as the normal liability insurance.
- ❑ Workers Compensation Coverage will be needed if you decide to hire a manager. We recommend using an part-time employment agency, since many assume liability and they also deal with all the other complications of having employees, such as payroll and tax deductions.

6. Note that this is the experience of one group. Reviewer Curt Buchholtz notes that profits will vary and may more commonly be closer to 5% or 10%. In addition, groups can run into hidden or unanticipated costs that will cut into profits (e.g., the computer needs replacing, the group has to take on heating or lighting expenses, etc.)

7. Insurance is a complex issue. Plan to do some research before you decide on a policy. Your local insurance agent, accountant, lawyer, local nonprofits, and other cooperating associations will prove to be good resources.



Taking Care of Business— Making it Legal

Friends of Rhode Island Refuges, Rhode Island

Author's note: My thanks to Fran Bodell for composing the following piece.

Setting up a legal business operation requires some paperwork. Each state will have different rules about filings, taxes, and business operations, so contact your local state offices to find out what you need to do. Following is a listing of what Friends of Rhode Island had to do before we opened our doors for business:

- ❑ **File for 501(c)(3) status with the IRS.** Non-profit status is required for a group to enter into a cooperating agreement with the US Fish and Wildlife Service.
- ❑ **Sign a Memorandum of Agreement (MOA, also called the Cooperating Association Agreement) with the US Fish and Wildlife Service.** This was a rather lengthy process and was the most complicated for our group to get. Note that each Region has their own rules on processing these agreements. Your best bet is to find someone in your Regional Office who knows the process. You'll also make things easier if you obtain a copy of another Friends group MOA that was recently signed and then modify it to meet your own needs. When you submit the MOA for legal review, you can note that it was already approved and simply focus on any new language added by your group or manager.
- ❑ **Apply to the state for a Certificate of Tax exemption.** This allows the group to buy anything without paying sales tax. A 501(c)(3) designation was needed to get this exemption and there was a one time fee of \$25. It took about a month to receive the Certificate.⁸
- ❑ **Register with the Rhode Island Department of Business Regulation.** All nonprofits are supposed to register in Rhode Island, yet many do not because there is a \$75 per year fee and an audit or a statement by an independent accountant is required (which can cost from \$200 to \$1,500 depending on the group's income).
- ❑ **Obtain a sales permit.** This was a relatively easy step and costs \$10 per year per sales location (Friends of Rhode Island Refuges have two locations). These permits allow the group to sell items which are gift shop related. In Rhode Island, the group must collect a sales tax on all items except clothing. Sales tax must be paid to the state quarterly for each location, but will be paid monthly when sales pick up.

8. Note: the need to apply for this Certificate and the turn around time varies from state to state.

Beyond the paperwork, Friends of Rhode Island recommend visiting another refuge before getting started. Two members made a trip to Blackwater NWR in Maryland to learn about their operation. Fran writes of their experience:

One of the other “shopkeepers” and I arranged a visit to Blackwater to visit the *Eagles Nest* and Peggy Tillier who instructed us in “Bookstore 101.” Besides being a wonderful trip and friendly visit, we learned a lot of information on:

- ❑ Vendors complete with catalogs
- ❑ Training of volunteers and general staffing—even good ways to deal with credit cards
- ❑ Display of items
- ❑ Inventory, pricing, ordering and how much to order
- ❑ What type of things sell and when and to whom
- ❑ Some on keeping books
- ❑ Some of the problems we might encounter
- ❑ Someone to call when we don't know the answer -- this perhaps was the most valuable and anxiety reducing of all

One of the greatest thing about Friends Group connections is the feeling that we're all working toward the same goal. Even the bigger mature groups had, and still have, growing pains and are willing to share their knowledge and support. And support from other Friends Groups is important because they can appreciate small successes and frustrations when refuge staff may be too busy to recognize a starting groups efforts.





Keys To Running A Successful Bookstore

Friends of Blackwater NWR, Maryland

In 1987, Friends of Blackwater had 23 members and \$490 in its bank account. Thanks to a \$3,000 loan from Chincoteague Natural History Association, a gift of a safe, cash register, and display racks, they were able to start their bookstore.

One year later, they had about \$5,500 in the bank and paid back their loan in full. From these humble beginnings, the Friends of Blackwater has become a highly successful organization supporting not only their own refuge, but serving as a catalyst and mentor for Friends groups in the mid-Atlantic region and across the country.

Over the years, the group has seen a steady increase in their sales, as they continually work to improve their operations. In fact, with only about 200 to 300 square feet of sales space, their bookstore now grosses more than \$60,000 a year. Peggy Tillier, volunteer bookstore manager, shares the group's tips for making a bookstore operation a success.

- ❑ **Offer quality items.** These don't necessarily have to be expensive. You're better off to have fewer quality items than to cram your store with junk. For example, Blackwater is now the exclusive area distributor of some lovely nature oriented jewelry designed by a local artist.
- ❑ **Offer some inexpensive and small items for kids.** For example, Blackwater offers reasonably priced binoculars with "Friends of Blackwater" printed on them. These aren't high quality binoculars, but the kids can afford them. In addition, the group provides a free pencil to every child that comes through the door. The pencils have "A gift from Friends of Blackwater" printed on them. Peggy notes, "These cost the group some money, but no child has to go home without something from their visit at the refuge."
- ❑ **Think about what the customer wants.** Offer goods that are unique (souvenirs, T-shirts, gifts, etc.). Don't use generic products, because people won't buy them. Also, offer some courtesy items that provide a service to your visitors. For example, postage stamps for postcards and binocular lens cleaning items for folks who arrive unprepared.
- ❑ **Offer products on sale.** Don't just put the stuff that's not moving on sale. Put items people really want to buy on sale too. This way they'll keep coming back.
- ❑ **Keep shelves stocked and neat.** Your store volunteers must constantly spend time keeping things tidy and re-stocking shelves. Peggy also notes, "You can't sell anything that's in a drawer or closet. If you take pride in what you're selling, your customers will take pride in what they're buying."

- ❑ **Talk to people, even if they're not buying anything.** Peggy notes, "There's a big difference between a sales person and an order taker!" Sales staff chat with their visitors, find out where they're from, and what they're doing in the area. From these conversations, it becomes easy to steer customers to products that might interest them.
- ❑ **Make the job easy for your volunteers.** Peggy looks at it this way, "You're not really running a bookstore, you're running a volunteer organization." If you think about ways to help your volunteers do their jobs well, you'll increase your store's efficiency and even your sales. And if you provide detailed instructions to your volunteers, you might prevent a costly mistake.⁹ In one example, the group found their computerized price listing didn't always work and it was hard for volunteers to find the information manually. Peggy created two printed lists, one organized by the product number, another by the product's name to make the process easier. These lists help the volunteers tremendously and makes it much easier to complete a sale. In another case, volunteers didn't like using the manual credit card machine – "they'd hide it and take down the credit card sign." The group switched to an automatic card swiper and credit card sales now make up almost 50% of their income. Peggy notes that the credit card service costs as much as four percent (4%) of their sale, but recommends "don't lose your sale by not taking credit cards!"
- ❑ **Listen to your volunteers.** Blackwater keeps a suggestion book for volunteers to make requests, and when volunteers travel, they often bring home ideas and products they think would work in the store. In one experience, the volunteers kept asking for kids T-shirts, even though the bookstore committee thought they wouldn't sell. The committee finally listened and have found the kids T-shirts to be a good item. Lesson learned: "Always, always be willing to listen to anyone's ideas."
- ❑ **Establish good management systems.** Good systems help make the business run more smoothly and efficiently. When Peggy took charge, she found that there were no information systems in place for ordering products. To help the process, she created a master list that includes information such as the vendor, account number, and the names of the individual salespeople she deals with, purchase and selling prices, and ISBN numbers for books. While they took time to develop, these lists have simplified and standardized their ordering process.



9. Friends of Blackwater have offered to make their manual available to anyone who is interested to use as a guide. Contact the group at (410) 228-2677.

Fundraising Events

Fundraising events provide great opportunities for Friends groups to get exposure, build community support, build volunteers and membership, and simply to have fun. Holding a special event is, however, the least effective way to raise funds. Even if your event proves profitable, significant resources (people, time, money) are required to put on an event—it's lots more economical to use other avenues for raising funds. That said, the benefits of holding special events are significant, and, at a minimum, this tool can help your group get the exposure and build the relationships it needs to raise funds through other means. Events can prove especially important for Friends groups in rural areas, because they can draw strangers to the area and help you expand your member and donor base beyond the limited pool available in your local community.

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If your only goal is to make money, it is probably a bad idea to hold a special event. Your committee members would be much better off simply asking the people they know to give money for the organization.

— Flanagan, 1995, p. 142.

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Before your group decides to sponsor an event, it would be worthwhile to consider what you want to achieve from it. For example, an event can be used to:

- Build membership
- Get exposure for the group through publicity about the event
- Provide opportunities for the public to use the refuge in productive ways
- Educate children and adults
- Build partnerships (businesses, conservation and recreation groups, scouts, and clubs, etc.)
- Provide opportunities for volunteers
- Build relationships with your members
- Provide opportunities for leadership
- Have fun!
- And, of course, raise money

For any one of these ideas, you'll want to consider in advance how you'll achieve your goals. For example, let's say one primary reason for having an

event is to build membership. You will first want to decide on a membership goal and then decide how to get these folks to join. Some ideas might be to:

- ❑ Have a membership table.
- ❑ Promote the group and enroll members as part of each program offered at the event.
- ❑ Record names and addresses of participants for future mailings. You can do this by:
 - having people sign a guest book or sign in for each program offered
 - taking names and addresses as part of a raffle¹⁰
 - giving receipts for contributions made at the event
 - selling tickets for various programs

For each of these ideas, you'll need volunteers assigned to collect the requested information and take memberships.

If you want to gain exposure as one of your goals, you'll need to decide how you'll do this (e.g., through press releases, asking for interviews with local papers, advertising, flyers placed in strategic locations, etc.). Again, enthusiastic volunteers will be needed to perform each of these tasks.

And, when it comes to raising funds, you'll need to prepare a strategy. For example, will it be through new memberships, charging for programs, auctions, requests for donations, and/or fundraising to support the event?

The bottom line is, special events require lots of serious planning to succeed.¹¹ Here are some suggestions for getting started.

- ❑ **Decide on your event.** Klein (1995, p. 98) suggests a number of considerations in choosing your event: its appropriateness; the image reflected on the organization by the event; the amount of volunteer time; front money needed; the repeatability and timing of the event; and how it fits into your fundraising plan.
- ❑ **Consider your timing.** Be sure to leave yourself enough time to do the event well. One way to plan the timing is to work backwards from the event, deciding what needs to be done each week and month beforehand. This should give you a good estimate of when it's feasible for your group to hold the event. Remember, press releases need to be prepared and sent out well in advance. And fundraising may need to start a

10. Note that the IRS and FWS consider raffles as gambling and the FWS does not allow raffles to be conducted on refuge property. Raffle income may be subject to taxation and the IRS has rules about how the winnings must be reported. Consult with your accountant or lawyer on this issue.

11. Joan Flanagan's *The Grass Roots Fundraising Book: How to Raise Money in Your Community* provides an excellent discussion on event planning and offers an number of ideas for events.

year in advance (or more): many businesses make their decisions about donations at the beginning of their fiscal year and the turn-around time for a grant application can be six months or more.

- ❑ **Set up a committee.** This needs to be chaired (or co-chaired) by a strong leader who is organized, able to communicate and keep track of details, and gets people excited.
- ❑ **Empower the committee to do its job.** There's nothing worse than being second-guessed by a board that can't help micromanaging.

Your event committee will need to prepare a plan that describes the "who, what, when, where, why, and how" for the event. Here are some general considerations.

- ❑ What is the event, where and when will it happen?
- ❑ Why are you doing it (what will the event accomplish)?
- ❑ Who will lead each component of the event (you need a chairperson to hold things together, but will also likely need subcommittee leaders too)?
- ❑ How many volunteers do you need (time needed, jobs they'll do) and who will recruit and oversee them?
- ❑ Who do you want as partners, if any?
- ❑ Who will take care of publicity and what's the timeline for getting notices out (some newspapers require as much as a month's notice)?
- ❑ What supplies are needed? Where will these come from (purchase or donated)? Who will take responsibility for this aspect?
- ❑ How much will it cost and where will funds come from? Who will raise funds and get donations of goods or services?
- ❑ How will the event make money?

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The motto for every special event is 'Plan your work and work your plan!' Careful planning at the beginning will help your group raise more money in less time and enjoy the experience more so everyone will be eager to volunteer again next year.

— Flanagan, 1995, p. 146.

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Once the committee has answered these questions, it will be easy to create a master schedule of activities, which includes a timeline for the completion of each step and identifies who is responsible. The chair/co-chair will have the responsibility for making sure each person follows through and that all aspects of the plan are completed on schedule.

Immediately after an event, the committee needs to meet and evaluate the event. Record what went well, what could be done better, what not to do again, and what new activities could be added next time. This evaluation should be stored together with the event planning records to be used again next year. This process will make it easier to run the event and improve it each year.

Not sure what to do for an event? The ideas are endless and Friends groups are not limited to holding events only on the refuge, for example:

- Special excursions and tours of the refuge
- A festival celebrating refuge wildlife
- Programs on popular subjects with well known speakers
- An art event: wildlife photography or wet paint auction
- A dinner, picnic or barbecue
- An auction of art, antiques, or donated merchandise
- A rummage or tag sale
- A sports or recreational event: road race, golf tournament
- Link activities and programs to national events, such as National Wildlife Refuge Week, National Trails Day, and National Public Lands Day.

To sum it up, make the event work for you. Decide how the event will help your group and have fun doing it! In the end, a successful event will move your group forward tremendously and even if it doesn't make much money, you will have gained a great deal towards your fundraising goals through the new partnerships, exposure, and friends you made along the way.



Launching a Group with a Special Event

SEWEE, South Carolina

In August 1996, SEWEE (South Eastern Wildlife and Environment Education) Association, which supports Cape Romain NWR in South Carolina, was newly formed. They had seven members and about \$400 in the bank. This little group had a huge challenge ahead, namely to open a bookstore in four months when the refuge's new education center would open. The group decided they needed to raise at least \$2,000 to \$3,000 to buy products for the store and the best way to do this would be by sponsoring an event.

Fortunately for SEWEE, Rudy Mancke, naturalist for ETV's *Nature Scenes* television program, lived in South Carolina and was willing to donate his services to the group. They asked Mr. Mancke to lead a tour on Bull's Island which is a maritime-forest-beach habitat accessible only by boat. Bull's Island is so big that a visitor cannot see much in one day, so a tour led by a famous naturalist would provide a unique opportunity for a refuge experience that was not otherwise possible.

The group planned the tour to include round-trip ferry service, truck transportation around the Island, interpretation by Mr. Mancke, and a catered lunch. At \$50 per ticket, the event was a deal for visitors, but would yield sufficient funds to meet the group's financial needs.

Two tours of 38 people each were provided in one day. The first group was ferried over in the morning and headed out on the trucks to tour the Island. While the first group was touring, the ferry collected the second tour group waiting on the mainland and returned to the Island in time for everyone to have lunch together. After lunch, the first group was ferried back to the mainland while the second group toured.

Tickets were prepurchased and they sold out. The group sent announcements to a mailing list of informal refuge friends and a list of members from the local Sierra Club. In addition, they advertised in the local newspaper. Most participants in the event came from the newspaper ads – the name recognition of Rudy Mancke was so high that people clamored to get their tickets.

The group invested the \$400 they had in the bank to pay for initial costs of the event. In addition, local vendors were willing to receive payment after the fact. The registration process required folks to send in their checks before their participation would be confirmed, hence the group had funds in hand before the event.

Costs were kept to a minimum: Mr. Mancke donated his services; the ferry service was provided to the group at a reduced cost, because it was run by a refuge concessionaire who believed in what the group was doing; the group located a caterer who provided lunches at a reasonable cost; and all the organizing was done by volunteers with lots of support and help from refuge staff.

When asked, SEWEE Executive Director, Karen Beshears, chuckles that their biggest surprise was: "It didn't rain!" It was a good thing too, because they had no con-

tingency plan! In reality, their biggest surprise was the “enthusiasm of the people who came. And, most of the people from the original tour have maintained their membership!”

The event netted \$2,682 which, “was enough to buy books—not enough to fill the store, but enough to start!” Since then, their bookstore and group has thrived. They are planning their fourth annual event, which now sells out about a month in advance. They have a membership of 300 people. And their bookstore income has allowed the group to initiate a highly successful Earth Steward’s environmental education program.¹²

SEWEE’s environmental education program has given the group incredible exposure and helped them build new relationships. The community has become involved and the group has received many donations to support the program. Indeed, some of Karen’s contacts have been so excited about the Earth Stewards concept that they have been “selling” the idea for the group. In one example, an acquaintance (who was not affiliated with SEWEE) got the local Junior League to donate \$1,000!

SEWEE’s experience shows how well organized events can lead to much bigger fundraising successes. Karen notes that she is “a strong believer in that when things are right, they work.” SEWEE, a young organization of only 3 years, clearly has a track record of doing the right things.



12. Earth Stewards is a National Fish and Wildlife Foundation sponsored environmental education program that can be tailored to each site. SEWEE has used the Earth Stewards framework to develop a 9 week curriculum for 5th graders.



Festival of the Cranes

Bosque del Apache NWR, New Mexico

Bosque del Apache National Wildlife Refuge's *Festival of the Cranes* is an annual event in its 13th year. It now attracts about 7,000 to 8,000 participants per year and involves more than 200 volunteers from around the country. It brings about \$600,000 in revenue to Socorro County, which has a population of 14,000 and is "in the middle of nowhere" more than 90 miles away from Albuquerque, New Mexico.

The festival has gone through many transitions over the years, from being mainly a local event to a national phenomenon. It was originally coordinated by a Chamber of Commerce volunteer with refuge staff acting as festival committee members. It is now managed by a paid coordinator (funded by the Friends of Bosque NWR) who works nearly full-time at 1,200 to 1,500 hours a year.

Former Manager, Phil Norton, created the idea for the festival as a way for the refuge to connect with the community. He hoped the festival would help take away the local perception of the refuge as filled with "gray faces—bureaucrats who have no contact with the community." Through the festival he sought to add some color and get folks working together. The idea worked and has brought incredible recognition and support for the refuge.

Sponsoring this festival requires lots of planning and commitment by the refuge, community, and the Friends group to ensure success. In an interview with Phil, he reveals Bosque's keys to success:

- ❑ **Be clear on your goal:** The *Festival of the Cranes* was started to allow the refuge to interact more closely with the local community—to build a relationship. For this reason, even though the event was a refuge idea with a refuge focus, it was established as a County of Socorro event.
- ❑ **The refuge must make a serious commitment and allocate resources.** Phil allocated significant refuge resources in both staff time and funds. His philosophy was that sponsoring the festival was no different from managing a marsh—the festival was simply one part of the refuge program. In addition, Phil notes that it is important to stay with it—the refuge entered its relationship with the community for the long run and realized that it would take time before they would all begin to see the returns on their investment. Lastly, refuge involvement is key to ensuring that the festival programs are appropriate and consistent with the mission of the refuge.
- ❑ **Plan a quality event.** Beyond the refuge and its natural resources, the area is rich in archeological, historical and cultural resources. The festival provides quality programming in all these areas, giving participants a wide array of opportunities. In addition, new events are offered each year to keep the festival fresh. The variety of events allows the community to advertise its resources in a way that would otherwise be difficult. People want to visit again, which benefits the local economy.

- ❑ **Bigger is not always better.** Given its mission of “wildlife first,” the refuge must balance programming so as not to conflict with the wildlife, yet provide a quality experience for visitors. In addition, the community can only handle so many folks (i.e., hotel beds, restaurants, etc.). Recognizing this, the community and refuge have moved into a mode of maintaining quality and not on continual expansion.
- ❑ **Engage the right coordinator.** Qualified people make all the difference. Someone with marketing experience is really helpful because s/he can direct advertising to fit the needs. The coordinator keeps it all together, tracking progress in planning. This person needs to be focused solely on the festival and not have many other responsibilities.
- ❑ **Organizing is key.** Organizing the *Festival of the Cranes* goes on all year long. They have a close out session a few days after the event and then start on the next year’s festival a month later.
- ❑ **Say thank you to everyone and give them a token gift.** In 1999, the Friends printed coffee mugs with the festival logo on them. On 500 of these cups, they also added “Thank you for your help!” Everyone who helped with the festival received one of these cups and an article was printed in the news.

The Festival Yields Big Payoffs:

The Refuge, Friends, and Chamber of Commerce, annually commit significant resources and time to the festival. Is it worth it? For Phil, the answer would be a resounding “yes!” The goal of connecting with the community has been far exceeded—he refuge now has lots of friends and supporters, the community is investing in the environment, and the refuge is viewed a good neighbor.

By making the festival a community event, the refuge forged an important partnership with Socorro County. The locals took ownership and pride in something that saw huge success and brought direct economic benefit to their community. They began to see the refuge as a good neighbor, one that was concerned about their viability as a community.

The festival gave the refuge exposure to the community. This exposure helped build trust and community buy-in, which has led to more generalized support for the environment. Phil notes that Socorro was never a “hotbed” for environmental concern. Yet, now folks are buying bird books, binoculars and bird seed. They are giving money for environmental causes, even though they do not see themselves as environmentalists. The refuge even gets congressional support in an area of the country known for its anti-environment and anti-government sentiments. The reason for this support is because not only does the refuge interact more closely with the community, it has become *part* of it.

The refuge’s resource investment has also paid off. At first, the coordination, publicity, and management of the festival was done by the Chamber of Commerce, with

significant involvement by refuge staff acting as members of the festival committee. Because of its success, the festival has taken on a life of its own and the direct burden on refuge resources is decreasing. The Chamber is still very involved handling much of the administration, but oversight has shifted more and more to the Friends group (established in 1992). The Friends now pay the coordinator's salary, market festival merchandise, and play a significant role in volunteering and festival programming.

But, What About Fundraising?

Remember, the primary focus of an event is not to raise funds. While events can and do raise significant funds, they are resource intensive and it's a lot easier to raise funds in other ways.

For Bosque del Apache NWR, the pay-offs have been in the friends and supporters forged as a result of the event. The festival has generally raised some funds, but not huge amounts, especially given the level of resources invested. And, it has lost money too. Here's a synopsis over the last few years:

<i>Fiscal Year</i>	<i>Revenue</i>	<i>Expense</i>	<i>Profit (Loss)</i>
'94 - '95	\$35,000	\$30,000	\$5,000
'95 - '96	\$41,000	\$34,000	\$7,000
'96 - '97	\$39,000	\$35,000	\$4,000
'97 - '98	\$42,000	\$34,000	\$8,000
'98 - '99	\$41,000	\$48,000	(\$7,000)

It's only now, after twelve years of building this event that the Friends of Bosque are looking more seriously at its fundraising potential. The event's high national profile, visitation, and popularity makes exploring opportunities for corporate sponsorships and donations possible. In addition, the Friends group has reached a level of maturity that allows it to easily take over the marketing of all festival merchandise, such as tote bags, T-shirts, sweatshirts, coffee cups and caps. These items all carry the festival logo and sell very well. Phil expects the Friends group to "make a killing" this year on the merchandise, to the tune of \$20,000 to \$30,000.

The *Festival of the Cranes* has put Bosque del Apache NWR on the map. It draws people from around the country to an unpopulated area. Festival participants return to the area, join the Friends, and purchase goods in the bookstore. In addition, the local community has experienced great economic benefit from the event. The direct fundraising benefit of the event has yet to be realized, but the longer-term payoffs have been tremendous. A community that once viewed the refuge with suspicion and skepticism has become its most ardent supporter.



Don't Sell a Lunch, Get Them To Come!

Friends of Black Bayou, Louisiana

Robert Eisenstadt's enthusiasm about Friends of Black Bayou, Inc., is contagious. He can't say enough about the talent and commitment of the members of this group. And it's clear that this talent, energy, enthusiasm, and commitment has led to the group's huge success.

Friends of Black Bayou, Inc., was established in August 1997. Within two and a half short years, the group is able to list an impressive number of achievements. Their refuge manager, Kelby Ouchley, described it this way in the Friends Spring 1999 newsletter when the group was just 18 months old: "I doubt that there is a friends group in the country that has accomplished as much as FoBB has in the past year. Progress often seems slow when dreams are grand, but think about it -- over \$30,000 raised, the planter's house moved and major renovations started, two major public events/celebrations produced, grants written and received, promotional literature developed, etc., etc., etc. All of this and our working membership can be counted on my fingers and toes."

When Friends of Black Bayou, Inc., got started they decided they wanted to "hit the road running." They didn't want to waste lots of time talking and so decided at their first meeting that what they needed most was public exposure. They wanted to get the word out about who they were and what they were about. While the start-up group had managed to attract a number of highly educated members of the community (biologists, economists, educators), Bob notes that they had a "huge learning curve." And learn they did.

The board planned a fundraiser as their first attempt to gain exposure. They figured any event that got folks out to the refuge would meet their goal, so they decided on a red beans and rice dinner. They sold tickets for five dollars apiece, and they rented a tent for the event. About 70 to 100 people came, the group netted about \$200 to \$400, and they signed up a few new members. Bob notes that the event was okay, but didn't really meet the group's expectations. In fact, he describes it as "pretty much a bust."

In evaluating the event, the group recognized a few things. First, they realized that their primary goal was to get publicity – *to get people to come* – not so much to raise funds! In organizing their event, they had focused their energies on selling tickets and not on how to attract large numbers of people. In the end, they had a reasonably successful event, but they didn't get the visibility they wanted.

They also realized that when they sold meal tickets, they weren't getting people out for an event; they were selling a lunch. People who bought the tickets didn't see themselves as being vested in the group; they were simply buying a ticket for a lunch that they may or may not attend.

The next year, the group planned another fundraiser. Having learned from their experience, they decided to focus their energies on getting a large number of people out on the refuge. They planned the event as a celebration where everyone who had done something for the group would get an award. And they decided to *give away* the lunch.

To get the people, they generated lists of all the teachers within 40 miles, all elected officials, doctors, business leaders, their members, and others. They merged these lists and sent out a huge mailing, inviting folks to the refuge. They kept costs down by getting as much donated as possible, from tents to food. They printed awards for everyone who had helped the group and planned a formal presentation to thank their supporters.

This time, they had about 250 to 300 people attend. At the event, they put up a bucket requesting donations – they got \$10 and \$20 bills for the \$5 lunch! They sold memberships, T-shirts, and caps and asked for general contributions. In all, they were able to pay back their expenses (about \$1,000), plus they made an additional \$2,000 from the event!

The group then repeated the event for a third year, adding more events and focusing on kids and families. About 400 people attended, four lifetime members joined at \$500 each, and the event netted more than \$3,000. Bob notes that someone even dropped a \$100 bill in the donation bucket for a Coke!

While the events have been successful at raising funds, the group feels the money earned is simply a bonus. Their goal is to gain visibility for their group. If they get television coverage, newspaper reporters, and lots of people at the event with good photo opportunities, and the group breaks even, they feel they have succeeded.

Clearly, this Friends group has realized the value of making lots of *friends*. Their strategy of using publicity to build support and raise funds has really paid off. In little more than two years, they have grown to over 200 members and raised more than \$80,000. Artists have donated the group's logo and the design for a quilt being used as a fundraiser. Others are donating significant amounts of time to transform a century-old planter's house into an education center because "it's fun."

When asked what is attracting people to support and join the group, Bob says, "the enthusiasm." They get people out to the refuge to see what the Friends are doing and get them excited. They make every effort to get people to understand that the refuge is part of the community. And they work hard to make people feel a part of the group and its accomplishments.

When asked about the Friends' success at raising funds, Bob states, "It's amazing how many people will give you \$20 if you just ask!"



Foundations, Corporations and Grantwriting

As your group begins planning its fundraising strategy, you will likely consider writing grants to foundations and/or corporations. These can be fabulous sources of funding, especially for large projects, because it's not uncommon for grants awards to be in amounts ranging from \$5,000 to \$25,000 or more. While seeking grants money from foundations and corporations is a legitimate approach to raising funds, it should not be the primary strategy, to meet your group's funding needs. There are a few reasons for this:

- ❑ **Competition is fierce** — Anderson (1996, p. 6) notes that the odds are lousy: "Roughly "10-15% of all grant proposals are funded... Many 'successful' proposals are only partially funded, which leaves the grantee scrambling..." Even the National Fish and Wildlife Foundation's Refuge Support Group Grant Program, which is a program dedicated to funding refuge Friends group projects, has funded only about forty percent (40%) of applications received (overall, this Foundation awards about 10% of applications).¹³
- ❑ **Funds are limited** — there's only so much money to go around and the need is much greater than what's available. In fact, foundations comprise only seven percent (7%) of all philanthropic giving and corporations make up about five percent (5%). Indeed, each year, individuals give more to nonprofits through their wills (7%) than corporations.
- ❑ **Grant money is unreliable.** Foundations generally don't care to fund a group for more than a few years. They regularly change their priorities, and your ongoing projects may no longer fit the foundation's interests. Becoming dependent on grants as a primary source of funding can be risky, if the funds dry up, so may your group.
- ❑ **Grants can drive projects decisions and organization direction.** In an attempt to meet grant criteria, your group will need to tailor its requests to meet foundation interests. Of course, you'll always want to match your group's interests with those of foundations to which you apply. But, over time you could find yourself compromising too much. You could end up running projects that really don't meet your goals or even changing the direction of your organization simply to position yourself to receive grant awards.
- ❑ **Grants are *not* easy money.** The amount of effort required to do the research, write a grant, and manage the reporting requirements that come with an award is tremendous. You'll need to submit applications

13. T. Needham (personal communications, May 2000)

with the realization that perhaps none, or very few, of them will be funded. And grants often come with strings attached – funds are *restricted* for the purpose described in your grant.

As you plan your fundraising strategies, save grant writing for projects that have a clear focus and definitive outcomes. Build your organization with funds from a diversity of local sources first, remembering that individuals are your greatest resource, providing 80% or more of all philanthropic dollars. As you build your portfolio, you will find certain aspects of your work easy to package into a grant request. And the more diverse your funding sources, the easier it will be to receive grant awards. You'll be able to demonstrate a track record of accountability, success, and broad-based support, all things a foundation or corporation will look for as evidence that your group is a safe investment. Indeed, Robinson (1996, p. 9) suggests that you "raise at least half of your budget from individuals, major donors, benefits, and earned income." He notes:

If you raise most of your own money from grassroots sources, you will find it easier to get grants. This sounds like a paradox, but the idea is simple. Most foundations prefer to back solid organizations that aren't desperate for money, because these groups tend to be more effective. If your community helps to pay for your work, it shows that they care about your work.

Getting Money from Foundations:

Getting money from a foundation is no different from getting money from an individual. It's all about relationship building. It takes time and patience. It means being rejected, perhaps many, many times – but there's always someone out there who will say "yes!"

There are ways that you can increase your chances of winning a grant award from a foundation, so here are a few tips.¹⁴

- ❑ **Do your research.** Don't bother applying to foundations whose mission or interests are dissimilar from your own. You'll be wasting time and paper. There are many good resources for detailed information on foundation giving. Refer to the resource section for some of these.
- ❑ **Make a phone call.** After you've done your research, you'll have a list of foundations that look good on paper. Call them to briefly discuss your idea. You'll find out lots of information not easily gathered in your initial research phase. For example, a foundation may have changed its priorities, or only be giving to certain organizations this year. A quick phone call will help you weed out many foundations, and it can also be

14. If you plan on approaching this avenue seriously, plan to invest in one or more books on writing grants. Robinson's *Grassroots Grants: An Activists Guide to Proposal Writing* is an excellent resource.

your first step to building a relationship with those that show an interest in your work.

- ❑ **Start locally.** You'll find it's lots easier to get money from a local foundation than one further from your area. Remember, you're not receiving funds from an *organization*, but from the *individuals* who manage the foundation. These individuals are more likely to give you money if they have a connection with you – they live in your community; they visit and care about your refuge; they have a friend or relative that is a member of your group; they have knowledge of your work because of your publicity, or maybe they even attended one of your events. Over time, as you win the approval (and funding) of local foundations, you'll be in a much better position to seek money from regional or national foundations.
- ❑ **Match your interests.** Think hard about why a foundation should fund your group. What's in it for them? What's special about *your* group and project (as opposed to the hundreds of others applying for funds) that would help the foundation meet *its* goals in funding you?
- ❑ **Focus on outcomes.** Foundations are generally looking for ways to do good work with their money. Again, what's in it for them? Focus on what *specific* things you will accomplish with their money.
- ❑ **Read the directions!** An incomplete application is an annoyance at best to a foundation and may result in a returned, unread application. Be sure to use the right application forms and fill them out completely. Respond to all the questions asked by the foundation in your grant application. Remember to include all the requested attachments. Check the deadlines – you don't want your application to arrive late!
- ❑ **Make it easy for your readers.** Remember that the people reading your application are dealing with volume control. They are likely to start with a quick weeding out – which ones look promising based on the title, the summary paragraph, and the general appearance of the application. It's kind of like weeding through your mail: toss a bunch, set some aside for later, open a handful of interesting looking envelopes. Be kind to your reader. Don't annoy them with a dense thesis typed in a small font – you may risk having your application end up in the toss pile (see sidebar on tips to writing).
- ❑ **Don't give up.** Rejection is the name of the game in grant writing. But realize this is generally *not* because your project is unworthy. Remember that resources are limited and competition is fierce: if you make it to the top twenty, but a foundation can only award 15 grants, you get a rejection letter. The closer you can get to the foundation, the better your chances, because the reviewers are more likely to make awards to the handful of organizations with which they are familiar. You can use

a rejection as an opportunity to get closer to a funder that is a good match for your group. If you get a rejection letter, call to find out why. Ask if there is anything you can do to make your application more appealing. Ask to meet with them or invite someone from the foundation to come and visit the refuge and your group to gain first hand knowledge of your work. Even if you can't get a visit or meeting, apply again. The second or third time around, your group's name will be more familiar and you may have a better chance. The bottom-line is, try, try again.

- ❑ **Stay in touch.** Just as you would nurture your relationship with a major donor, you'll want to nurture your relationship with the foundations who fund your projects. Be sure to acknowledge your funders in all your publications and news releases. Send them copies of newsclippings and updates of your accomplishments. Don't wait until the grant ends or the next funding cycle comes around to keep in touch.

Fundraising from Corporations:

“

Most businesses want to support groups that benefit their employees, that make it easier for them to make a profit, or that will help improve their image with customers or investors.

— Flanagan, 1995, p. 79

”

Many of the tools listed above for working with foundations apply to corporations as well. But before you approach a corporation, it's important to understand that corporations generally support (Klein, 1996, Seltzer, 1987):

- ❑ Projects that improves community life;
- ❑ Organizations that offer volunteer opportunities for their employees;
- ❑ Groups that help employees be more productive;
- ❑ Education of young people to ensure adequate work force; and
- ❑ Projects that will give the corporation positive publicity.

Corporations will generally only support groups that work in communities where the company has a presence (stores, factories, offices). They give in part to be a good neighbor and in part to provide opportunities to their employees (e.g., through volunteering). Even if you have direct contact with someone within a corporation who supports your group and has power to make a donation, you'll only get funds if you are working within their districts.

“

In trying to understand what will motivate a corporation to give money, it is important to remember that the business of a profit-making company is to make money, not to give it away, and its decision to act in a philanthropic way is usually related to some business interest.

— Wolf, 1990, p. 213

”

Businesses and corporations assist nonprofits in a variety of ways:

- Cash gifts, grants and contributions
- Goods, products, and/or services
- People power: expertise in financial management, marketing, personnel, public relations, etc.; volunteers for projects; board members
- Facilities: conference rooms, auditoriums, other meeting facilities
- Promotion and publicity through corporate sponsorship
- Marketing their wares with a direct benefit to a nonprofit

If you decide to approach a corporation, consider carefully what you want from them and also what you have to offer that will peak their interest (e.g., publicity). Also, be aware that the FWS has policies regulating donations made to refuges. As an independent organization, your group can work more freely than a refuge, but, especially in the case of large corporate donations, you'll want to be sure there aren't any restrictions on using any of these funds at your refuge. Your manager can request information through the Department of Ethics Office Web Site at www.doi.gov/ethics/ethics.html.

Finally, you'll want to be aware of what a particular corporation represents to your group, the refuge, and your community. Some folks feel concerned about receiving "tainted money" (e.g., donations made by oil or chemical companies) and won't accept these donations. Conversely, others, like Curt Buchholtz, a highly successful fundraiser for the Rocky Mountain Nature Association in Colorado, have a different perspective on contributions made by these corporations. He says: "taint enough!" Obviously, your group will want to make its own decision and carefully weigh the pros and cons of any potential donation.

Writing a Grant:

If you choose to seek funds from a corporation or foundation, you'll generally be required to submit your request in the form of a grant application. Writing and submitting a grant application is a reasonably standard process. You will

Here's a few tips for those of you who want to apply for NFWF's Refuge Support Group Minigrant Program (these tips apply to any grant application as well). One reviewer lists the following points about what helps make a winning proposal:

- ❑ All information is complete
- ❑ The group either has or has applied for nonprofit status
- ❑ The group has matching funds
- ❑ The group is working with others
- ❑ Creativity and fresh ideas
- ❑ A plan that seems obtainable, reasonable and realistic
- ❑ "I am partial to on the ground projects or those that have a lasting impact"

Another minigrant reviewer makes the following comments:

"What makes a competitive proposal? Details, details, details. Be as specific as you can, particularly with respect to articulating your goals (what you want to accomplish), your methodology (what steps will you take to achieve your goals), and who and what benefits when your goals are met. Also, stating clear and measurable results tied to your evaluation, is key, because it shows that you have thought through your benchmarks for success."

need to fill out an application form that gives the foundation some basics about your group: who you are, the title of your project, how much money you're seeking. You may be asked to summarize your proposal in one or two pages for a screening review. If the foundation likes your idea they'll ask you to submit a full proposal. Other times, there is no screening process and you're expected to submit a full proposal.

Written proposals must address a number of areas, with most foundations seeking the same basic information. Following is a summary of what is usually expected along with some sample statements used by Friends groups who have submitted applications to the National Fish and Wildlife Foundation Refuge Support Group Minigrant Program:¹⁵

- ❑ **A Cover Letter** – A short letter (one page or less) that introduces your group and your project. States the amount of funds you are seeking and provides basic contact information.
- ❑ **Summary Statement** – clearly summarizes your request in one or two short paragraphs. The summary is important because it gives your

15. Adapted from Kiritz (1985).

reader a “taste” for what’s inside. The summary can be key to getting your application placed into the reviewers “read” pile.

Friends of the Wildlife Corridor, Texas

With the assistance of a capacity building grant, the Friends of the Wildlife Corridor intends to provide educational canoe trips on a quarterly basis to increase the public’s awareness of an incredible resource and the measures necessary to protect it. This project will help to develop membership; provide networks to build and strengthen partnerships with local governments, businesses, schools and other conservation organizations; increase contact with potential volunteers; and will build capacity by introducing new skills and talent that will advance the Friends’ mission of protecting, supporting and enhancing the Santa Ana and Lower Rio Grande Valley National Wildlife Refuges and the entire refuge system.

- ❑ **Needs Assessment or Problem Statement** – describes clearly and succinctly the reason you are seeking funds. Tells the reader about the specific problem you are trying to address and why your project is important.

Friends of Anahuac Refuge, Texas:

Anahuac Refuge, established in 1963, has **no organized outreach into the surrounding communities** in Chambers County. As part of establishing networking into “our home” community, the Friends of Anahuac Refuge are sponsoring “hands-on” nature discovery classes for school children in the county. Currently, no such opportunities are available.

- ❑ **Goals and Objectives** – clearly describes what you want to accomplish with your project in measurable terms.

Friends of Anahuac Refuge, Texas:

Our goal is to teach six (6) different programs to the 2300 elementary school children in the county, plus 150 students at High Island in Galveston County.

Friends of the Mississippi Sandhill Crane NWR, Mississippi:

- Raise public awareness for MSCNWR and the Mississippi sandhill crane
- Raise funds for the Friends of the MSCNWR
- Provide the public with a positive source of environmentally based entertainment.
- Bring money in the form of ecotourism to local business.

- ❑ **Methods or Plan** – describes the activities that will be used to meet the objectives. It details your plan of action and its implementation (who, when, what), and shows how you will meet your goals and objectives.

Friends of Anahuac Refuge, Texas:

The project will be implemented as follows including the timetable:

- Currently (March, 1998)

Training of volunteer teachers for four of the six classes.

- April, 1998:

"Nature Discovery" classes held for Kindergarten and first grades.

- May, 1998:

"Adaptations" classes for second grade. "Insects" classes for third grade and "W.O.W. Wonders of Wetlands" classes for fourth and fifth grades will be held.

- Summer 1998:

Development and training of volunteer teachers for "Natures Internet" (first grade, dealing with the inter-relatedness of all things) and "rep-tile" (Fifth grade).

- School year 1998-9:

All of the above classes will be available at the beginning of the school year.

- **Evaluation** – Foundations are paying for outcomes, so this section shows how you'll know if you succeeded at meeting your goals and objectives and how you'll measure success.

Friends of the Mississippi Sandhill Crane NWR, Mississippi:

Success will be assessed based on the number of visitors in attendance (hopefully greater than 1000), the number of vendors and organizations (30), the number of participants in the art contest (35), and the number of performance musicians. Surveys to determine methods of improvement will also be distributed to committee members after the festival.

Friends of Big Muddy, Missouri

With the new [educational display] equipment, we intend to double the number of festivals we have booths at, with the increase being in communities we have not been to before. We will be successful if one in every five people we talk to signs up to receive additional information, and of those one in five comes to an event or becomes a member within six months.

- **Budget** - Describes how much money is needed and how the funds will be used. The budget must tell the same story as the proposal narrative, be detailed, including all aspects of the project (request from the funder, matching funds from other sources, volunteer donations, etc.), and be sufficient to perform the tasks described in the project.

Keys to Writing

When you write your proposal, consider the following guidelines:

- ❑ **Use Action verbs (don't use passive voice!)**

Active Voice:

Participants will learn techniques for building effective community partnerships.

Passive Voice:

The training will result in participant understanding of the issues affecting Friends groups in developing community partnerships.

- ❑ **Be Brief (say what you have to say, not more!)**

Using action verbs helps! Write your first draft and then cut, cut, cut. If you can't tell your story in three to five pages, it's too long.

- ❑ **Write as you talk.**

Read your proposal out loud. Rewrite any sentences that sound funny or are hard to say out loud.

- ❑ **Don't use jargon.**

Don't assume your reader will understand what you are talking about. Be sure to explain scientific terminology and don't use acronyms (spell it out).

- ❑ **Avoid unfamiliar spellings and strange words.**

Make it easy for your reader to understand what you are trying to say!

- ❑ **Keep sentences short (10-15 words).**

Reading out loud will help you do this. It's awfully hard to say a long sentence!

- ❑ **List events or processes in chronological order.**

Start with an outline. This will help you keep things in order and will also help you decide what you want to say.

- ❑ **Use lists, rather than wordy sentences where possible.**

Lists work well any time you have a sequence of events or ideas. Lists also help to increase your white space, making your proposal easier to read.

Keys to Formatting

Use formatting to make your document look friendly. For example, use lots of "white space" which helps "open up" a document, making it easier to read. You're better off having a five page document that has lots of white space and a larger font, than to squeeze everything onto two pages. You want your readers to be willing to read your document; you don't want to scare them off with a document that looks like a thesis.

- ❑ Use headers, bolding, underlining, etc., to separate or emphasize ideas.

These formatting techniques can be helpful, but don't overuse them! You will lose emphasis if you bold or underline too many ideas. Use these formats sparingly to break ideas into a logical sequence or to emphasize important thoughts.

- ❑ Type size should be no less than 10 pitch.

Even 10 pitch can seem too small for some fonts, 12 pitch is generally better.

This is 10 pitch. This is 12 pitch.

- ❑ Use familiar type faces.

Familiar type faces are easier to read. Fonts with serifs are also easier to read. For interest and to break up your document, you might use non-serifed fonts for titles and section headings, but don't use them for the main body of your document.

This is New Aster (12 pitch), used for the text in this document.

This is Times (12 pitch), a commonly used serified font.

This is Helvetica (12 pitch) – it works well for headings in **bold face**.

This font is *Dom Casual* (12 pitch), it is an unfamiliar type face that is hard to read.

- ❑ Don't use all capital letters.

ALL CAPITAL LETTERS ARE HARD TO READ.

- ❑ Don't "pack" all the text onto a few pages, use plenty of white space.

Consider using the two-thirds / one-third rule: two-thirds text / one-third white space. Remember, white space is *not* wasted space!

Some Closing Tips:

Grant reviewers are unpredictable. It's impossible to know what will or will not catch their attention at any particular time. Even when you think you're addressing an issue they'd like to fund with your project, you still get a rejection letter. But, there are a few things you can do to improve your chances:

- ❑ **Build a relationship.** This has been stated over and over again, but it is the best way to at least get your application in the pile of grants that receives serious review.
- ❑ **Write for your reader.** Consider what they'd like to hear and not so much what you want to tell them. Think about why they should care about your needs and how they benefit from funding your project (e.g., a chance to make a lasting change on an issue they care deeply about).
- ❑ **Think and write big picture.** While you'll be asking for funds for a specific project, it's not the details of the project that counts so much, but how you'll use the project to achieve a greater goal (that of making lasting change). Think beyond your group and idea to your community, the refuge, and the refuge system overall. For example, while you might simply want to build a kiosk, it's how you'll use it that's important.

Friends of the Wildlife Corridor took this last point to heart in their Refuge Support Group Minigrant application. Their funding request was simple: 5 canoes, 15 paddles, 15 life jackets and 5 first aid kits to allow the group to run canoe trips along the Rio Grande. But, instead of saying that they wanted to run canoe trips along the river because it was a good idea, they phrased the opportunity this way:

The Friends will strengthen its membership by providing educational canoe trips along the portion of the Rio Grande that borders the Lower Rio Grande Valley and Santa Ana National Wildlife Refuges, the Wildlife Corridor. Canoeing the Rio Grande will provide a service—not only to its members, but to the general public—by becoming a signature project which could prove to be many things to the Friends, primarily a unique and diverse outreach tool. The Friends recognize an opportunity to serve and expand their membership by utilizing the natural, cultural and historical opportunities provided by the river.

They close by making the following statement that makes the case about why anyone should care about their project—they plan to change the world, just a bit:

The Rio Grande plays an important role in the lives of Americans, not only as a path that leads us back to the history and substance of our nation, but as a natural resource that sustains us as individuals and communities. As important as it is, few of us have had the privilege of

enjoying its beauty and traversing its winding course. For many, the exploitation and degradation goes unnoticed. As unnoticed as the swooping peregrine and comical kingfisher. Helping return people to this lifeline is what the Friends of the Wildlife Corridor intends to do.

Public Relations

“

Nonprofit organization often believe their programs will sell themselves. Nothing could be further from the truth. Even the best of programs will fade into obscurity unless those who need to know about them are made aware.

— M. Booth and Associates, 1995, p xiv.

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A key aspect to fundraising is getting the word out about your organization's activities and accomplishments. Publicizing your work in the media, through advertisements, through your newsletters, and in personal notes to your major donors, is critical to raising and maintaining interest in your organization. Without this step, your work will go unnoticed — why would anyone donate to an organization they know nothing about or that doesn't seem to be accomplishing anything?

In a presentation given to the New England Friends Network, Walter Mulhall, retired Vice President in charge of Public Relations at Pillsbury, describes public relations as:¹⁶

- Doing something and getting credit for it.
- Convincing others of the value of what you are doing
- Common sense

He notes that good public relations is free advertising that makes you look good. It also:

- Increases interest
- Increases volunteers
- Increases public support
- Increases government support

16. For a number of detailed articles on this subject, see the Winter 1999 National Wildlife Refuge Association's Friends Flyer, Vol. 2, No. 1.

- Raises money
- Makes people feel good about themselves.

Flanagan (1995, p. 259) notes "In terms of your fundraising efforts, the purpose of general image publicity is to create a positive image of the organization in the minds of the public at large. People should identify the name of the group with the idea of a growing, effective, and efficient organization... Good publicity makes people realize that your organization is a good investment, because you are doing what they want done and saying what they want said."

To be effective, you don't want to leave your public relations to chance, hoping some reporter will pick up the story or that one of your members will write an article for your newsletter. As in all other aspects of fundraising, planning is key. M. Booth and Associates (1995, p. xv)¹⁷ suggest that "Public relations thinking should be part of the organization's strategic planning. Public relations must be an integral part of management and given a prominent role in the organization." They suggest developing a public relations plan that includes the following:

- Objectives:** What do you want your public relations activities to accomplish?
- Target Audiences:** Who do you want to reach or influence?
- Key Messages:** What are the one or two most important ideas you want to communicate?
- Strategies:** What general approach(es) do you want to use to reach your audiences (e.g., media relations, volunteer outreach, special events)?
- Tactics:** What tools will you employ (e.g., newsprint, awards program, work days, personal notes to donors)?
- Timetable:** What is a realistic time period to carry out your strategies?
- Budget:** How much will your organization dedicate to your public relations activities?

Common tools to getting your story told include: newspaper articles, press releases, giving speeches, and sending mailings to your various audiences. Mulhall suggests developing a separate mailing list for each of your constituencies. You could have separate lists for business leaders, government leaders,

17. *Promoting Issues and Ideas, 2nd Edition*, by M. Booth and Associates, Inc., is an excellent resource on public relations – it provides simple, yet helpful descriptions to such topics as developing informational materials, working with the media, and developing a speakers bureau. Another great resource is *Getting the Word Out in the Fight to Save the Earth* by Richard Beamish.

general membership, and major donors. Then use each of these lists to send mailings that would interest each group of people. Mailings might include copies of news articles, press releases, letters to the editor, speaking engagements, and announcements. For your major donors, you could include a personal note (e.g. "Here's a wonderful example of how your donation has helped our group achieve its goals. Thanks for your continued support!"). By sending copies of your public relations successes to your constituencies, you keep them informed and interested in your group.

Once you've decided *how* you'll approach public relations, you'll need to decide *who* will do the work. Flanagan (1995) suggests some qualities for a good publicity chairperson: willingness to make a commitment for at least a year; articulate, well informed, likes to talk about the group, writes clearly and able to meet deadlines, able to make and receive phone calls during the day, have access to a phone and computer.

Using public relations effectively will increase your group's exposure and put you one more step ahead in building your nest egg.



painetworks.com/Carl & Ann Purcell

Summary—Keys to Building Your Nest

Make It Happen!

Creating a successful organization depends, in part, on raising enough funds for the group to accomplish its objectives. The many success stories provided in this book suggest that the options open to Friends groups are fairly limitless. Some ideas presented in this book may be very easy for your group to implement right away, while others will require more effort. Regardless, it's important to remember that building your group's nest egg will take time and determination. As you consider how to build your foundation for the future, remember these key points:

- ❑ **Fundraising is all about making *friends*.** Relationships are key to your organization's success—place friendship building at the top of your priority list as you plan all of your group's activities.
- ❑ **The Friends/Refuge relationship is also critical to a group's fundraising success.** A good relationship, where the staff and Friends members are working together toward mutual goals, will ensure that the group can meet its obligations to its members and donors.
- ❑ **Getting your house in order will give your group the stability and reliability it needs to attract donors.** Good management systems, a plan of action, people to do the work—all are important to achieving success. Plan for the future from the start and you'll increase your ability to meet the needs of your members and donors.
- ❑ **Decide what's right for your group.** There are many ideas presented throughout this book; and some will work better in your community than others. Take the time to consider what makes sense for your group before deciding on a plan of action.
- ❑ **Remember, small steps lead to huge successes.** The work ahead of your group may seem daunting! Don't let this deter you from taking small steps toward the future. You don't need to do everything at once—take the baby steps and celebrate each success! In time, your group will be making great strides.
- ❑ **Have fun!** You'll make lots more friends and hold onto them longer if your group is involved in activities that people enjoy. Plan to focus lots of attention on celebrating successes and celebrating the people that contribute their time and money. Not only will these celebrations make everyone feel good, they'll attract attention to your group and draw new members and donors.

About the Author:

Beverly Heinze-Lacey began her career as a volunteer refuge activist in 1992 when she joined the newly forming Friends of Parker River NWR in Massachusetts. She is currently a member of its Board of Directors and acted as president for five years (1992 – 1997). In 1996, Ms. Heinze-Lacey instituted the National Wildlife Refuge Association's Friends Initiative, and provided consultation through 1999. Ms. Heinze-Lacey has designed training programs, offered technical support to refuge Friends groups, and conceptualized and edited the widely acclaimed handbook, *Taking Flight: An Introduction to Building Refuge Friends Organizations*, a 1997 publication of the National Wildlife Refuge Association and the US Fish and Wildlife Service (FWS). Ms. Heinze-Lacey received a Citizen Achievement award in 1995 from the FWS for her efforts in promoting and supporting refuge Friends groups. Currently, she is working on a number of Friends projects with the FWS while raising her two children, Max and Kate, with the help of her husband Jim.

About the Publishers:

The National Wildlife Refuge Association is the only national membership organization dedicated solely to protecting and perpetuating the National Wildlife Refuge System. Our mission is to preserve and enhance the integrity of the nation's largest network of lands and waters set aside primarily for the benefit of wildlife. We advocate increased Congressional funding and improved policies to maintain a healthy and properly managed wildlife refuge system capable of sustaining diverse plants and wildlife. Combining a Washington, DC headquarters, regional representatives and members from around the country, the NWRA is a leader, mobilizing citizen support for refuges. The National Wildlife Refuge Association works to ensure that our national system of wildlife refuges is protected today and for generations to come.

The US Fish and Wildlife Service is the principal Federal agency responsible for conserving, protecting, and enhancing fish, wildlife and plants and their habitats for the continuing benefit of the American people. The Service manages the 93-million-acre National Wildlife Refuge System of more than 520 national wildlife refuges, thousands of small wetlands, and other special management areas. It also operates 66 national fish hatcheries, 64 fish and wildlife management assistance offices and 78 ecological services field stations. The agency enforces Federal wildlife laws, administers the Endangered Species Act, manages migratory bird populations, restores nationally significant fisheries, conserves and restores wildlife habitat such as wetlands, and helps foreign governments with their conservation efforts. It also oversees the Federal Aid program that distributes hundreds of millions of dollars in excise taxes on fishing and hunting equipment to state wildlife agencies.

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Resources

Refuge Support Group (Friends) Partners:

The following four organizations manage various programs offered to Refuge Support Groups. Program coordinators at each of these organizations can assist groups with their fundraising, organizing, and training needs. National Wildlife Refuge Association and National Audubon Society each have helpful electronic mailing lists for groups to use in networking; contact them for information.

National Audubon Society, 1901 Pennsylvania Ave, NW, Suite 1100, Washington, DC 20006. Telephone: 202- 861-2242.

Website: www.audubon.org/campaign/refuge.

National Wildlife Refuge Association, 1010 Wisconsin Ave, NW, Suite 200, Washington, DC 20007. Telephone: 202-333-9075. Website: www.refugenet.org. Copies of *Taking Flight and Building your Nest Egg* may be obtained from this office.

US Fish and Wildlife Service, Division of Refuges, 4401 N. Fairfax Dr., Rm 670, Arlington, VA, 22203. Contact the Refuge Support Group Coordinator. Telephone: 703-358-2303. Website: www.fws.org. Copies of the *Refuge Support Group Directory, Taking Flight and Building Your Nest Egg* may be obtained from this office.

National Fish and Wildlife Foundation, 1120 Connecticut Ave, NW, Suite 900, Washington, DC, 20036. Telephone: 202-857-0162. Website: www.nfwf.org. Offers a variety of grant programs, many of which are applicable to Refuge Support Groups. See their website for detailed information. In addition, the Foundation offers a loan program that groups may use in starting a Cooperating Association.

Other Resource Organizations:

The Environmental Support Center, 4420 Connecticut Ave, NW, Suite 2, Washington, DC 20008-2301. Telephone: 202-966-9834. Website: www.envsc.org. Provides funds for grassroots groups to hire consultants and attend trainings. Also offers a low-interest loan program.

The Foundation Center, 79 Fifth Ave, New York, NY 10003.

Telephone: 212-620-4230. Website: www.fdncenter.org. Provides information on where to go in your state to do fundraising research and includes links to other useful sites.

The Grantmanship Center, 1125 Sixth St, 5th Fl, PO Box 17220, Los Angeles, CA (0017. Telephone 21-3482-9860. Website: www.tgci.com. Conducts workshops in proposal writing, publishes a magazine and other low-cost publications.

The Independent Sector, 1828 L St, NW, Washington, DC 20036. Telephone: 202-223-8100. Website: www.indepsec.org. Publishes a variety of papers and books for nonprofits. The group is composed of representatives of nonprofits, monitors IRS regulations, new legislation and postal rates affecting nonprofits. The website offers useful information for groups getting started with fundraising.

Institute for Conservation Leadership, 6930 Carroll Ave, Suite 420, Takoma Park, MD 20912. Telephone 301-270-2900. Website: www.icl.org. Offers a variety of training opportunities and consultation for environmental nonprofit organizations.

National Center for NonProfit Boards, Suite 900, 1828 L St, NW, Washington, DC 20036-5104. Telephone: 800-883-6262. Website: www.ncnb.org. Offers a variety of publication on managing and raising funds for nonprofit organizations. Their comprehensive website includes useful information for nonprofit groups.

The Society for NonProfit Organizations, 6314 Odana Rd, Suite 1, Madison, WI 53719. Telephone: 608-274-9777. Website: <http://danenet.wicip.org/snpo>. Serves as a resource for nonprofit boards, staff and volunteers. Publishes a magazine on nonprofit issues and a monthly report on funding opportunities.

The Taft Group, 27500 Drake Rd, Farmington Hills, MI 48331-3535. Telephone: 800-877-3238. Website: www.taftgroup.com. Offers a variety of books on fundraising from individuals, corporations and foundations, board development, direct mail, and volunteer programs.

Books:

Authors Note: The reference list includes a number of excellent resources. If your group plans to engage in serious fundraising, I highly recommend you obtain the following:

Beamish, Richard. (1995). *Getting the word out in the fight to save the earth*. Baltimore: The Johns Hopkins University Press.

Flanagan, Joan. (1995). *The grass roots fundraising book: how to raise money in your community*. Chicago: Contemporary Books.

Klein, Kim. (1996). *Fundraising for social change* (3rd ed.). Berkley: Chardon Press.

Robinson, Andy. (1996). *Grassroots grants: an activist's guide to proposal writing*. Berkeley: Chardon Press.

Additional Reading:

Author's note: The following have been recommended by Friends group members as being helpful resources:

Hale, Robert, Marshall, Allen, & Curwen, Ginger. *A manual on bookselling: how to open and run a bookstore* (4th ed.). Tarrytown: The American Booksellers Association.

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Publications:

The Chronicle of Philanthropy, PO Box 1989, Marion, OH 43306-2089.

Website: www.philanthropy.com. Provides a biweekly publication listing of what's new in the nonprofit world, training opportunities, and grantmaking information. This is the leading fundraising tool used by professionals.

The Non-Profit Times, PO Box 403, Hopewell, NJ 08525-0408. Telephone:

609-466-4600. Website: www.nptimes.com. Offers a monthly newsletter for nonprofit groups.

Publishers:

Chardon Press, 3781 Broadway, Oakland, CA 94611.

Telephone: 888-458-8588. Website: www.chardonpress.com. Their useful website lists books and other resources on fundraising and organizing for social change.

Oryx Press, PO Box 33889, Phoenix, AZ 85067-3889.

Telephone: 800-279-6799. Website: www.oryxpress.com. Publishes a variety of books on grantwriting and fundraising.

Precept Press. PO Box 11403, Dept. WD, Chicago IL 60611.
Telephone: 800-225-3775. Website: www.bonus-books.com. Various books are available on fundraising. Call or write for a catalog.

Videos:

Klein, Kim. *Grassroots Fundraising Series*. Headwaters Fund, 122 W. Franklin Ave, Suite 518, Minneapolis, MN 55404. Telephone: 612-879-0602. This is an *excellent* video that covers a wide variety of fundraising topics for nonprofit groups. Cost is 0.1% of your annual budget (range \$25-\$400).

Other Useful Websites:

www.mapnp.org/library. Provides a library of popular topics useful to nonprofit groups. This is an excellent site that offers articles, links, book listings and the like.

www.nonprofits.org/npofaq/ Provides information on everything from advocacy to volunteer recruitment.

www.nutsbolts.com/resource Contains a grantwriting tutorial.



painetworks.com/Carl & Ann Purcell

Summary—Keys to Building Your Nest

Make It Happen!

Creating a successful organization depends, in part, on raising enough funds for the group to accomplish its objectives. The many success stories provided in this book suggest that the options open to Friends groups are fairly limitless. Some ideas presented in this book may be very easy for your group to implement right away, while others will require more effort. Regardless, it's important to remember that building your group's nest egg will take time and determination. As you consider how to build your foundation for the future, remember these key points:

- ❑ **Fundraising is all about making *friends*.** Relationships are key to your organization's success—place friendship building at the top of your priority list as you plan all of your group's activities.
- ❑ **The Friends/Refuge relationship is also critical to a group's fundraising success.** A good relationship, where the staff and Friends members are working together toward mutual goals, will ensure that the group can meet its obligations to its members and donors.
- ❑ **Getting your house in order will give your group the stability and reliability it needs to attract donors.** Good management systems, a plan of action, people to do the work—all are important to achieving success. Plan for the future from the start and you'll increase your ability to meet the needs of your members and donors.
- ❑ **Decide what's right for your group.** There are many ideas presented throughout this book; and some will work better in your community than others. Take the time to consider what makes sense for your group before deciding on a plan of action.
- ❑ **Remember, small steps lead to huge successes.** The work ahead of your group may seem daunting! Don't let this deter you from taking small steps toward the future. You don't need to do everything at once—take the baby steps and celebrate each success! In time, your group will be making great strides.
- ❑ **Have fun!** You'll make lots more friends and hold onto them longer if your group is involved in activities that people enjoy. Plan to focus lots of attention on celebrating successes and celebrating the people that contribute their time and money. Not only will these celebrations make everyone feel good, they'll attract attention to your group and draw new members and donors.

About the Author:

Beverly Heinze-Lacey began her career as a volunteer refuge activist in 1992 when she joined the newly forming Friends of Parker River NWR in Massachusetts. She is currently a member of its Board of Directors and acted as president for five years (1992 – 1997). In 1996, Ms. Heinze-Lacey instituted the National Wildlife Refuge Association's Friends Initiative, and provided consultation through 1999. Ms. Heinze-Lacey has designed training programs, offered technical support to refuge Friends groups, and conceptualized and edited the widely acclaimed handbook, *Taking Flight: An Introduction to Building Refuge Friends Organizations*, a 1997 publication of the National Wildlife Refuge Association and the US Fish and Wildlife Service (FWS). Ms. Heinze-Lacey received a Citizen Achievement award in 1995 from the FWS for her efforts in promoting and supporting refuge Friends groups. Currently, she is working on a number of Friends projects with the FWS while raising her two children, Max and Kate, with the help of her husband Jim.

About the Publishers:

The National Wildlife Refuge Association is the only national membership organization dedicated solely to protecting and perpetuating the National Wildlife Refuge System. Our mission is to preserve and enhance the integrity of the nation's largest network of lands and waters set aside primarily for the benefit of wildlife. We advocate increased Congressional funding and improved policies to maintain a healthy and properly managed wildlife refuge system capable of sustaining diverse plants and wildlife. Combining a Washington, DC headquarters, regional representatives and members from around the country, the NWRA is a leader, mobilizing citizen support for refuges. The National Wildlife Refuge Association works to ensure that our national system of wildlife refuges is protected today and for generations to come.

The US Fish and Wildlife Service is the principal Federal agency responsible for conserving, protecting, and enhancing fish, wildlife and plants and their habitats for the continuing benefit of the American people. The Service manages the 93-million-acre National Wildlife Refuge System of more than 520 national wildlife refuges, thousands of small wetlands, and other special management areas. It also operates 66 national fish hatcheries, 64 fish and wildlife management assistance offices and 78 ecological services field stations. The agency enforces Federal wildlife laws, administers the Endangered Species Act, manages migratory bird populations, restores nationally significant fisheries, conserves and restores wildlife habitat such as wetlands, and helps foreign governments with their conservation efforts. It also oversees the Federal Aid program that distributes hundreds of millions of dollars in excise taxes on fishing and hunting equipment to state wildlife agencies.

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Resources

Refuge Support Group (Friends) Partners:

The following four organizations manage various programs offered to Refuge Support Groups. Program coordinators at each of these organizations can assist groups with their fundraising, organizing, and training needs. National Wildlife Refuge Association and National Audubon Society each have helpful electronic mailing lists for groups to use in networking; contact them for information.

National Audubon Society, 1901 Pennsylvania Ave, NW, Suite 1100, Washington, DC 20006. Telephone: 202- 861-2242.

Website: www.audubon.org/campaign/refuge.

National Wildlife Refuge Association, 1010 Wisconsin Ave, NW, Suite 200, Washington, DC 20007. Telephone: 202-333-9075. Website: www.refugenet.org. Copies of *Taking Flight and Building your Nest Egg* may be obtained from this office.

US Fish and Wildlife Service, Division of Refuges, 4401 N. Fairfax Dr., Rm 670, Arlington, VA, 22203. Contact the Refuge Support Group Coordinator. Telephone: 703-358-2303. Website: www.fws.org. Copies of the *Refuge Support Group Directory, Taking Flight and Building Your Nest Egg* may be obtained from this office.

National Fish and Wildlife Foundation, 1120 Connecticut Ave, NW, Suite 900, Washington, DC, 20036. Telephone: 202-857-0162. Website: www.nfwf.org. Offers a variety of grant programs, many of which are applicable to Refuge Support Groups. See their website for detailed information. In addition, the Foundation offers a loan program that groups may use in starting a Cooperating Association.

Other Resource Organizations:

The Environmental Support Center, 4420 Connecticut Ave, NW, Suite 2, Washington, DC 20008-2301. Telephone: 202-966-9834. Website: www.envsc.org. Provides funds for grassroots groups to hire consultants and attend trainings. Also offers a low-interest loan program.

The Foundation Center, 79 Fifth Ave, New York, NY 10003.

Telephone: 212-620-4230. Website: www.fdncenter.org. Provides information on where to go in your state to do fundraising research and includes links to other useful sites.

The Grantmanship Center, 1125 Sixth St, 5th Fl, PO Box 17220, Los Angeles, CA (0017. Telephone 21-3482-9860. Website: www.tgci.com. Conducts workshops in proposal writing, publishes a magazine and other low-cost publications.

The Independent Sector, 1828 L St, NW, Washington, DC 20036. Telephone: 202-223-8100. Website: www.indepsec.org. Publishes a variety of papers and books for nonprofits. The group is composed of representatives of nonprofits, monitors IRS regulations, new legislation and postal rates affecting nonprofits. The website offers useful information for groups getting started with fundraising.

Institute for Conservation Leadership, 6930 Carroll Ave, Suite 420, Takoma Park, MD 20912. Telephone 301-270-2900. Website: www.icl.org. Offers a variety of training opportunities and consultation for environmental nonprofit organizations.

National Center for NonProfit Boards, Suite 900, 1828 L St, NW, Washington, DC 20036-5104. Telephone: 800-883-6262. Website: www.ncnb.org. Offers a variety of publication on managing and raising funds for nonprofit organizations. Their comprehensive website includes useful information for nonprofit groups.

The Society for NonProfit Organizations, 6314 Odana Rd, Suite 1, Madison, WI 53719. Telephone: 608-274-9777. Website: <http://danenet.wicip.org/snpo>. Serves as a resource for nonprofit boards, staff and volunteers. Publishes a magazine on nonprofit issues and a monthly report on funding opportunities.

The Taft Group, 27500 Drake Rd, Farmington Hills, MI 48331-3535. Telephone: 800-877-3238. Website: www.taftgroup.com. Offers a variety of books on fundraising from individuals, corporations and foundations, board development, direct mail, and volunteer programs.

Books:

Authors Note: The reference list includes a number of excellent resources. If your group plans to engage in serious fundraising, I highly recommend you obtain the following:

Beamish, Richard. (1995). *Getting the word out in the fight to save the earth*. Baltimore: The Johns Hopkins University Press.

Flanagan, Joan. (1995). *The grass roots fundraising book: how to raise money in your community*. Chicago: Contemporary Books.

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Additional Reading:

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www.nutsbolts.com/resource Contains a grantwriting tutorial.

