

FINANCING THE LEAGUE

"Grand policies would mean nothing if the money was not there to implement them."

- Carrie Chapman Catt, founder LWV

JOB DESCRIPTION: DEVELOPMENT DIRECTOR

OBJECTIVES: To plan/direct/conduct the fundraising activities of the League.

RESPONSIBILITIES:

1. Prepare an annual fundraising plan for board approval, taking into account the goal specified in the budget, as well as the money budgeted for fundraising expenditures. Both direct solicitations and special fundraising projects/events might be included.
2. Initiate and oversee all fundraising activities.
3. Be responsible for the collection of names of potential individual and business contributors. Add new names annually and keep lists up-to-date.
4. Direct the preparation and mailing of solicitation materials. Make follow-up calls to those who do not respond within a couple of weeks. Acknowledge contributions promptly.
5. Encourage board members to assist with fundraising efforts by providing names of new prospects, making personal contacts when requested and being aware of the funding potential of League activities.

The development director's job is to oversee all fundraising for the local League, with help from a development committee, the board, and the membership. In addition, the DOD should work with the board to develop special projects and identify foundation or corporate sponsors. Without adequate funds, a League's plans can be wasted, its voice mute.

The finance director sets the tone for all finance efforts for the League. She/he looks at the budget of the League and compares it to the many services the League provides the community. There's no doubt that contributors get excellent return for their money. The community is a better place because there is a local League. The finance director is able to communicate this both to the League members and to the potential contributors.

Be alert to League resources which include League fundraising publications, the expertise of other League people in local and neighboring Leagues, and the help of the membership vice president.

Confer with the previous development director. Get as much information as possible on past finance efforts. What worked well and not so well? Why?

If desired establish a committee whose members can be an excellent resource for ideas. The committee is all important in evaluating fundraising possibilities, tapping funding sources, and helping with money making activities. The finance director must believe in the abilities of the committee and in the product being sold—the League.

Questions to consider:

1. What fundraising activities would members most likely support with their time, talents and money?
2. What fundraising activities would the community most likely support with their contributions?
3. How much of the finance money should be sought from the community and how much from League members?
4. How much League time do the board and members want to spend on fundraising: a finance drive and many little money raisers? A finance drive and one major special project? (Of course, there are many possibilities but all combinations should include a finance drive.)

Remember to keep a complete record of activities, results, expenses, press releases and sample letters. Evaluate the work with the committee: What new sources of revenue were tapped? What approaches worked well? Was the goal met? Write specific recommendations as to how procedures could be handled better in the future.

TAX DEDUCTIBILITY

Contributions to the League of Women Voters are not tax deductible. All solicitation materials must state this clearly. The League of Women Voters of New York State Education Foundation (LWVNYSEF) is the tax-deductible affiliate of the state League. Local Leagues may solicit contributions to LWVNYSEF. These donations are tax deductible for local League members. They are held by the state League for the sole benefit of educational activities of the local League.

are held by LWVNYSEF Grants Management and can be used for voter service activities and other educational projects, as well as for partial payment of a League's per member payment state and national (PMP) obligation. For details, consult "Grants Management" in this section. For details consult the LWV publication, *Fiscal and Compliance FAQ* available at <http://www.lwv.org/AM/Template.cfm?Section=Treasurer&Template=/TaggedPage/TaggedPageDisplay.cfm&TPLID=86&ContentID=9525>

MEMBER SOLICITATION

Many members are willing and able to contribute to the League above and beyond dues. Give them an opportunity to make contributions on the dues or by a special mailing. Possible member categories include: suffragists, supporters, patrons, President's Club.

PERSONAL SOLICITATION

If you are lucky enough to have members or other community residents who are capable making large donations, you may wish to personally solicit them for a general donation or to fund a particular project. We recommend a phone call and home visit. At the visit you sell the League program, and convince the potential donor of its importance. It is often beneficial to leave materials for the individual to review, with instructions to call if they have any questions. Tell them you will call them in a week or two to discuss it further. At the second call you discuss whether they are interested and ask for a donation. It is important to have an idea of the ballpark amount of donation the contributor might be able to afford. Do not be afraid to ask them to stretch. For further information about personal solicitation, contact the state development director.

PLANNED GIVING

An excellent way for the League to raise funds is to convince members to remember the League in their retirement planning or in their wills. The state League has developed a brochure that is available for use by local Leagues.

CONDUCTING A FINANCE DRIVE

A finance drive is usually the mainstay of League fundraising and can provide an ideal opportunity to educate the public to the League's presence in the community, its purpose and its program.

Falls seems to be the best time for community campaigns as League visibility is high with voter services activities. Techniques include mail solicitation - printed or hand written - and personal solicitation visits. Use what works best for you.

Much of the work can be done over the summer. Tasks to be done for a mail solicitation include the following:

- Present proposed plan to the board for approval.
- Schedule date of mailing and determine what enclosures to send (many Leagues use *Facts for Voters*. Decide the follow-up to use and what date the follow-up will be implemented.

- Draft a solicitation letter for approval by the president. Give those members who want the tax deduction the ability to make a contribution to the Education Foundation for the benefit of the local League.

- Update the prospect list. The most important task is adding NEW NAMES. Ask board members for names. Include people who have used the services of the League, members of similar organizations, donors to other community groups, local legislators.
- - Print letters, address and stamp envelopes for mailing, stuff envelopes. Personal notes may be added by board members only if mailing is going first class.
- Ask your local newspaper editor for an editorial supporting the work of the League. Ask your mayor or municipal official to designate the week that your appeals are mailed as League of Women Voters Week. At the very least, submit a Letter to the Editor requesting support. Feel free to send a copy of an editorial with your mailing.

Follow-up includes:

- When a contribution is received, mail a thank you note. Thank you notes should be mailed within ten days of receiving the contribution. (The solicitation letter can indicate that thank you notes will not be sent in order to save postage. However, if the donation is \$250. or more, an acknowledgment must be sent.)
- After three weeks, write a "mop-up" letter to those prospects who have not sent in a contribution. You might also consider having a person who knows a prospect approach him or her directly.
- Deposit monies promptly.
- Leagues may wish to follow through with those who have not contributed. One way to do this is to hold a phone-a-thon, in which League members gather on a particular day and place a call to all those individuals who have not contributed.

Afterwards:

- Return to the database of prospects. Note helpful comments, amount deposited and change of address or status. Consider keeping a prospect on the list for three years before dropping.
- File solicitation letters, results of drive, and comments for the next finance director.

APPROACHING BUSINESSES

Many Leagues include small businesses in their regular finance drives or sell ads to small businesses to cover bulletin costs. (See section on "Bulletins" for information on postal regulations and mail solicitation.) It is frequently more productive, however, to ask larger companies to underwrite specific projects. For example, a bank might be asked to fund community distribution of *Facts for Voters* or a *Voters Guide*. A local industry might underwrite the cost of distributing packets of League publications to schools and libraries. A high school registration project could be underwritten by a union. A business might be willing to fund students for an education project or an internship.

When preparing a funding proposal, keep in mind what businesses want for their money: a good public image, a good public service, and the best payoff for their advertising dollars. The League's job is to convince the business person that a contribution will improve the business's public image and increase its dollar return. Don't forget to add to your estimated expenses at least 10% for overhead. When your proposal is ready, call for an appointment. Although you should be prepared to discuss your proposal by phone, a personal visit is preferable. In-person solicitation consistently produces more and larger contributions than any other finance technique. The advantage of a personal visit is that it tells the prospect that the matter at hand is an important one to which the fundraiser is clearly, sincerely committed. It allows for optimum, responsive communication and it is harder for the prospect to say no.

Many Leagues approach foundations run by local businesses and local families. Investigate the availability in your area and the type of projects they fund. Over time, it is possible to establish a relationship that will provide a stable source of funding for League activities.

Keep in mind the possibility of in-kind contributions. Maybe a local company could give your League a typewriter or a computer or reproduce your bulletin at no cost. Consider running a wish list in your bulletin of products and services you seek to maintain or enhance operations.

If you have a large company in your area, consider the possibility of making a joint approach with the state League. A member of the state board would be happy to work with you in planning a proposal that would provide the company with statewide visibility. If, as the result of a joint approach, a company is willing to contribute general support funds for the state League, that money is shared with the local League making the approach. Unfortunately, money designated for a special state League project, cannot be shared unless the grant proposal has a local League component written into it.

Major contributors should be kept in mind throughout the year, not just at the time of the finance drive. Send them personal invitations to your candidates night or copies of a new League publication.

SELLING SERVICES

The selling of services often taps a market not available for the finance drive. Churches and service organizations, for instance, may not budget for contributions but can pay honoraria to speakers. Government units and school districts can pay for services such as supervising special elections, reporting election results, or taking a census. Such projects tap members who will not work on finance drives but find this type of project stimulating. When considering the sale of League services, be sure there is adequate person-power to handle the task without abandoning the programs and services for which the members pay dues.

SPECIAL PROJECTS AND SOCIAL EVENTS

In recent years special projects have become a popular way for the League to raise funds. Besides making money, special projects can have such side benefits as providing a good social time for members, recruiting members, generating good public relations, and promoting League issues. What types of projects have Leagues found successful?

Generally special projects require more effort per dollar raised than a finance drive. It should also be recognized that most special projects raise money mostly from League members. Before tackling a special project, devote board discussion time to it. Is this project likely to succeed in the town? With our members? Is there member power, interest, and expertise? Will the event adversely affect League image? Will a special project conflict with the regular finance drive?

Special Projects include:

- Publications - Know your Community books - try to pre-sell to real estate agents
Cookbooks - special angle--low fat, recipes of political leaders
- Sales of products - T-shirts, note pads, etc.
- Flea markets
- Lecture series - authors will reduce fees if you allow book signing
- House tours - careful of insurance requirements
- Community tours
- Bed and Breakfast
- Tribute Cards
- Resale Shop - recycling the League
- Can Recycling Project
- Candles for birthday celebrations

Social Events include:

- Luncheons or Dinners honoring local leaders
- Theater parties
- Auctions-Art, Silent, Live
- Mystery Evenings
- Bridge
- Wine and Cheese
- Brunches
- Dessert Parties
- Concerts
- Marathon and shorter runs
- Pot luck suppers
- Used Book Sales

You may wish to combine events, such as a food event with an auction or silent auction. Members who have luxury items may be willing to make donations. Vacation home owners may donate bed and breakfast weekends. Boat owners may

donate a fishing trip or cruise. Holders of season tickets to sports events may donate tickets. Good cooks will often donate dinners or catered cocktail parties at your house or theirs.

Whenever you sell tickets, you should offer other support categories and list names on the program. When planning events, the key is attention to detail, delegation of responsibility, and clear benchmarks as to when each preparatory activity should occur.

MODEL OF SPECIAL EVENT PLANNING (This model should be adjusted as needed)

Three to Six Months Before Event:

1. Decide on event's purpose and theme
2. Estimate the number attending
3. Secure the facility
 - a. determine maximum capacity of site
 - b. determine costs and possible menu
 1. request that recyclable products be used
 2. include costs of guest
 3. other - facility rental, custodial charge, audio
 - c. determine final dates to:
 1. choose menu
 2. give counts
 3. pay (on day of event or billed)
 - d. request map/directions to facility and of internal layout
 - e. document all agreements in writing and send copy to treasurer and president
4. Develop Event Committee if desired
5. Design Program
 - a. arrange for speakers and/or workshop leaders
 - b. determine equipment needed:
 1. for speakers - podium, PA system, chalkboard, flipcharts, overhead projector
 2. workshops
 3. head table
 4. tables for registration and displays
 5. audio and video recording
 - c. set schedule of events
 - d. make alternative arrangements in case of insufficient reservations
 - e. set reservation deadline
 - f. request certificate of insurance
 - g. document all arrangements
6. Place on board meeting agenda for discussion and approval
7. Set menu
8. Set prices
 - a. registration, including: refreshments, materials, workshop costs, facility, transportation for speakers, audio-visual insurance costs
 - b. meal, including cost of free meals, taxes and gratuities
 - c. if appropriate, add percentage for other overhead expenses
9. Prepare articles for bulletin or publicity purposes
10. Send letters to speakers and presenters including event schedule, registration form (if appropriate) and invitation to be guest for meal.
11. Establish deadline for submission of materials to be copied and included in registration packets or available for dissemination.

One Month Before the Event:

1. Develop plans with committee regarding individual duties including:
 - a. registration table
 - b. publications table

- c. guides
 - d. photography
 - e. record speakers/workshops
 - f. collection of evaluation forms
 - g. escort outside participants
 - h. collect tickets
2. Compile registration packets
 3. Contact facility to arrange equipment needs
 4. Prepare publications display and materials

After Registration Deadline:

1. Call in a final count to facility
2. Discuss counts for workshops and make room assignments
3. Prepare signs with room numbers and directions
4. Prepare sign-up sheets, evaluation sheets, name tags

Day of Event:

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| <ol style="list-style-type: none"> 1. Check facility 2. Supervise Committee 3. Put up signs 4. Supervise set-up of publications display and sales 5. Supervise registration of participants 6. Provide name tags, sign-up sheets, forms, money box, etc. 7. Have a "drop box" for evaluation forms | <ol style="list-style-type: none"> 8. Double check arrangements for: <ul style="list-style-type: none"> a. recording speakers/workshops b. escorting outside speakers c. collecting tickets 9. Check with photographer 10. Bring check if necessary 11. Make final inspection of facility 12. Make attendance sheet for each workshop |
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Within One Week Following Event:

1. Send thank you notes to participants
2. Compile evaluation forms
3. Prepare report for next board meeting to include attendance, summary of comments, recommendations, financial statement

***(Courtesy of LWV Connecticut)

Summary:

1. Present final report to board
2. Edit for board, bulletin and press release

ENDOWMENT FUNDS The state League has adopted the Centennial Project, a bold new plan to raise \$9.7 million through pledges and planned giving, to be committed but not received by the date of the League's centennial anniversary. This fund will enable the state League to take over most of the secretarial and administrative functions from local Leagues, leaving them free to devote their energies to local study, voter service activities, and advocacy. Some local Leagues have also established their own endowment funds. Contact the state DOD for information about how to do this.