

Published by the Minnesota Historical Society for county and local historical organizations and heritage preservation commissions.

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## Money for the asking

Annual fund drive builds a strong base of support  
by Cassie Cramer

When it comes to asking your members for annual support, why stop at membership dues? Mailing a yearly letter requesting donations to an annual fund, above and beyond the price of membership, is a time-honored way for nonprofit organizations to raise extra operating monies.

Taking the time to ask your constituents – members and nonmembers alike – for annual support is well worth the effort.

In addition to securing operating funds, an annual appeal serves many other purposes. It promotes giving habits among the users of your services. It builds a solid base of donors you can turn to as needs arise. And it creates a bond between those donors and your organization. Whether your annual appeal is part of a larger fundraising program or just the first step toward more sure financial footing, it is a mark of sound organizational planning.

### Getting started

#### 1. Determine a goal.

Set a dollar goal you'd like to reach and a deadline for the giving campaign. Think about what's doable for your organization; if you're launching your first-ever annual appeal, it's okay to start small. Other measures of your success might include the percentage of responses you receive or the average gift size. Use those figures to gauge the effectiveness of your fundraising and chart your progress from year to year.

#### 2. Develop a comprehensive mailing list.

Identify your constituencies. Who is likely to support you? Start your mailing list with those who have ties to your organization. That means not only current members but also people who have shown interest in the past, such as lapsed members and nonmembers who have attended your events. Also ask each of your board members for a list of 10 people they know who might be prospective donors.

#### Money for the asking –

continued on page 2

Blue Earth County Historical Society



Blue Earth County Historical Society executive director Jessica Potter teamed up with board president Todd Stromswold to sign the society's year-end fundraising letter, which made a clear case for how annual gifts are used.

## Money for the asking – continued

### 3. Make a clear case for support.

Before you draft a letter, ask yourself why people should give to your organization. What will appeal to a broad base of people? Make your organization's story a compelling one. And be clear about why you need more money. If you're seeking general operating funds, be specific about how the money will be spent to serve your constituents.

### 4. Time your appeal strategically.

To reach individuals making giving decisions before the end of the calendar year, mail your appeal in November or early December. Or you may wish to time your fundraising to coincide with the end of your organization's fiscal year. There may also be special occasions or organizational anniversaries to consider.

## Writing the letter

Once you've determined the who, what, why and when of your annual appeal, you're ready to tackle how you'll ask for what you want.

- **The salutation.** Address each letter to a specific recipient, not "Dear Friend." Letters that are personalized get a better response rate.
- **The message.** Draft a simple one-page message that tells concisely what you are asking for and why. Be sure to ask for a gift of a specific amount or in a certain range. If you can customize your request, thank donors for their previous gift and ask them to increase their level of giving.

- **The signer.** Have someone well known in your community sign your fundraising letter. Remember – people give to people!

- **P.S.** Reinforce your request by including a P.S. at the bottom of the page. Try summarizing how the monies raised will benefit both the giver and your organization.

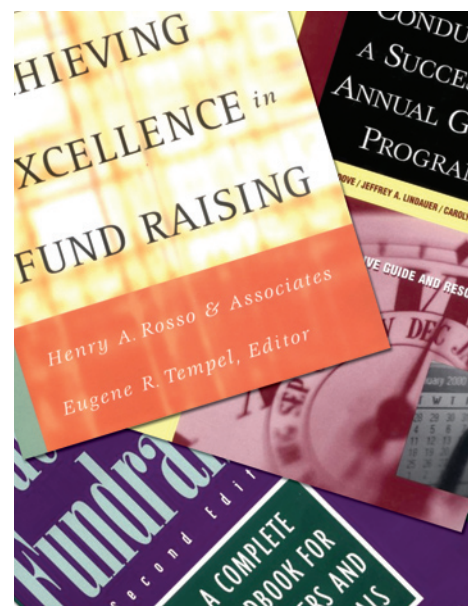
- **Enclosures.** Make it easy for people to give by including a return envelope (it doesn't need to be stamped). If you can, provide a reply card indicating various levels of support; you just may inspire them to increase their gift!

## Tracking responses

Track responses to your mailing as they come in. A simple spreadsheet of donor names and gift amounts will do. Be sure to send a thank-you note right away. And if the gift comes from someone recommended by a board member, let the board member know so that he or she can also send a note of appreciation.

Follow these simple guidelines and you'll find you're well on your way to a successful annual fundraising campaign. Good luck! ■

*For more information, call Cassie Cramer, director of development for the Minnesota Historical Society, at 651-259-3116.*



## Further reading

Check out these publications for advice on annual fund drives and other types of fundraising campaigns.

"Handbook for Starting a Successful Nonprofit," published by the Minnesota Council on Nonprofits.

"Achieving Excellence in Fund Raising," by Henry A. Rosso.

"Successful Fundraising: A Complete Handbook for Volunteers and Professionals," by Joan Flanagan.

"Conducting a Successful Annual Giving Program," by Kent E. Dove, Jeffrey A. Lindauer and Carolyn P. Madvig.

To order the handbook online, go to [www.mncn.org/publications.htm](http://www.mncn.org/publications.htm). The others are available from [amazon.com](http://amazon.com).

## Joining forces

Mergers help organizations strengthen local history presence

As budgets continue to tighten across the country, two pairs of local history organizations in northern Minnesota have pledged to join forces. Looking for fresh approaches to their common work, they're now tackling the details of joining together.

### A Fargo-Moorhead union

Because they have long shared a building and served the same Fargo-Moorhead metro area, the Clay County Historical Society and the Heritage Hjemkomst Interpretive Center are no strangers to the talk of mergers. From a seed planted years ago by the CCHS board, the two organizations voted recently to move ahead as one entity, to be known as the Historical and Cultural Society of Clay County, with a new logo and new bylaws.

The merger was guided by a joint committee of members from both boards, led by a facilitator who helped them frame the venture and anticipate challenges. "We had to make sure that both the county and the City of Moorhead were on board with the change," says Lisa Vedaa, former director of the county historical society. "After we hammer out the mechanics of merging, we'll turn our attention to long-range planning. Our goal is to provide a better experience for visitors. There was always confusion about our two organizations sharing the building. So it's more about efficiencies than about finances. Now we'll work together on our exhibitions and programming."

### A Cuyuna Range partnership

Also joining forces to breathe new life into their organizations are the Cuyuna Range Historical Museum and the Cuyuna Country Heritage Preservation Society. The unanimous vote came in late October of 2008.

The two history groups, working under a joint mission and a new set of bylaws, will share finances and fundraising, a plan for membership growth and policies for such matters as acquisitions. Now known as the CCHPS/Museum, located in Ironton, the combined organization will focus on community outreach to build a strong local history presence that will benefit the cultural, educational and economic climate of the whole Cuyuna Range area. ■

Historical and Cultural Society of Clay County



Staff members of the new Historical and Cultural Society of Clay County are (left to right) interim collections manager Lisa Vedaa, gift shop attendant Cassandra Braseth, archivist Mark Peihl, interim executive director Maureen Kelly-Jonason, communications coordinator Michelle Kittleson, volunteer/tour coordinator Markus Krueger and gift shop attendant Rachel Stone. Not pictured is the organization's Experience Works trainee.

# An economy of means

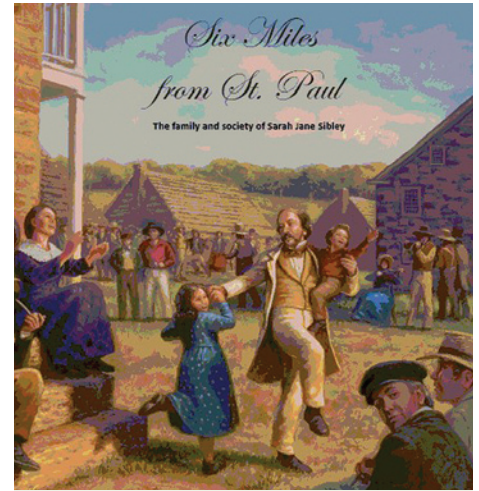
### Waseca project succeeds with do-it-yourself approach

Rarely does a project as unglamorous as shelving get thorough documentation. But Dan Swenson, treasurer of the Waseca County Historical Society, was proud of his organization's recent efforts to upgrade its collections storage. So he turned the project into a textbook example of good planning, preparing a detailed report complete with vendor information and advice on every step of the process. His goal: to help others learn what can be accomplished with limited resources.

The shelving project, a collaborative staff-board effort, began with an assessment of the 30,000-artifact collection, followed by careful measuring to ensure optimum use of

floor space. Then, like many smaller museums strapped for funds, the Waseca society stretched its budget by selecting affordable steel shelving, arranging free delivery, recruiting volunteers to do the assembly and using a magnetic labeling system devised in-house. The result: an efficient, economical new shelving system that takes up only half the floor space of the old shelving. The addition of a ladder-cart adds convenience and accessibility.

For a copy of Swenson's report or to tour the storage area, contact the Waseca County Historical Society at [www.historical.waseca.mn.us](http://www.historical.waseca.mn.us) or call 507-825-7700. ■



### Grabitske authors Sibley book

As a staff member at the Sibley House Historic Site in the 1990s, David Grabitske began research to right a wrong: a dearth of information on Sarah Sibley, wife of Minnesota's first governor. Over the years that research grew, culminating in the recent publication of Grabitske's biography, "Six Miles from St. Paul: The Family and Society of Sarah Jane Sibley."

Taking up residence in Mendota in 1843, Sarah not only managed the demanding household of her husband, fur trader and politician Henry Hastings Sibley, but also awakened Minnesotans to the importance of historic preservation. Her fundraising efforts on behalf of George Washington's Mount Vernon estate inspired another generation of women to preserve her own Mendota home.

To order the book (© 2008, Friends of the Sibley Historic Site, 188 pages, with illustrations, maps and appendices), go to [www.sibley-friends.org](http://www.sibley-friends.org).

Waseca County Historical Society



Volunteer Dan Swenson (center), treasurer of the Waseca County Historical Society, recruited helpers to assemble new shelving that maximized storage space for the society's collections.

## Minnesota Historical Society's 2009 Local History Workshops

# Modernize History

One down, three to go. There's still time to register for the April and May sessions of this spring's Local History Workshop.

Our theme, "Modernize History," demonstrates that history is not just about looking back; it's also about looking ahead. That's why we've focused workshop sessions on embracing change – growing your museum's collections, using technology to manage them and reaching new audiences – all topics designed to help you stay focused on the future. Join your colleagues at one of these regional meetings to learn how to stay current with a changing local history scene.

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### March 27

Northfield

Host: Northfield Historical Society  
Location: Archer House, 212 Division St., Northfield

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### April 17\*

Cloquet

Host: Carlton County Historical Society  
Location: Fond du Lac Tribal and Community College,  
Main Building, 2101 14th St., Cloquet

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### April 3

Slayton

Host: Murray County Historical Society  
Location: MCHS, 2480 29th St., Slayton

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### May 1

Shevlin

Host: Clearwater County Historical Society  
Location: CCHS Museum, 264 First St. W. (U.S. Hwy. 2), Shevlin

*\* This is a joint meeting with the Minnesota Alliance of Local History Museums. More sessions, one great price!*



## Registration Information

**Fee:** \$30 per person. Includes materials, lunch, refreshments and tour of local historic sites.

**To register:** Complete and mail the registration form on page 6. Or you may register online at <http://shop.mnhs.org>. Please register at least one week in advance of the workshop – by March 27 for Slayton, April 10 for Cloquet and April 24 for Shevlin.

**For more information:** Call David Grabitske at 651-259-3460 or e-mail [david.grabitske@mnhs.org](mailto:david.grabitske@mnhs.org).

## Minnesota Historical Society's 2009 Local History Workshops

# Modernize History

8:30 to 9 a.m.

**Registration, coffee, rolls**

9 to 10

**General Session**

*'We've Always Done It This Way' / David Grabitske, Local History Services Office*

Minnesota's historical organizations have developed a national reputation for not just upholding museum standards but staying ahead of the field. What will it take to maintain that edge in the face of growing demands and changing expectations?

10 to 10:30

**Break**

10:45 to 11:45

**Concurrent Sessions I**

**Insurance for the Future: A Strong Collections Management Policy / Collections Staff**

An effective collections management policy guides your museum as it acquires and cares for its collections – essential steps in interpreting the history of the community you serve. Sample policies will be shared and discussed.

**or**

**Worldwide Access / Technology Staff**

When museum visitation slows, having a website can bring your museum to your audience. Learn the standard components of a good website and explore low-cost applications for creating a strong web presence.

11:45 to 12:30 p.m.

**Lunch**

12:30 to 1:45

**Concurrent Sessions II**

**Shaping Your Future with a Collecting Plan / Collections Staff**

As your community changes over time, so too should your museum's collecting activities. A look at various collecting plans shows you how to refine and expand the scope of your collections to complement your mission and goals.

**or**

**Why Not Scan Everything? / Technology Staff**

Digital assets pose challenges for museums accustomed to managing more conventional collections. Discover how digital collections – those you scan and those “born digital” – can be managed with ease.

1:45 to 2

**Break**

2 to 3:15

**Concurrent Sessions III**

**Grants Workshop / Melinda Hutchinson, Local History Services Office**

Get practical tips for submitting grant applications, with a focus on Minnesota Historical Society state grants-in-aid.

**or**

**'I Don't Have Time!' / Technology Staff**

Software is supposed to help you manage your workload. But does it? Familiarize yourself with some common applications and learn how to evaluate their usefulness to you.

3:15 to 4:30

**Tour**

## Registration Form: Modernize History

Name:	Title:	E-mail:	
Organization:	Phone:		
Address:	City:	State:	Zip:
Select Date: <input type="checkbox"/> April 3 - Slayton <input type="checkbox"/> April 17 - Cloquet <input type="checkbox"/> May 1 - Shevlin			
Number of persons registering:	Total enclosed:		

Make check payable to **Minnesota Historical Society**. Mail payment and registration form to Minnesota Historical Society, Attn. Melinda Hutchinson, 345 Kellogg Blvd. W., St. Paul, MN 55102-1906.

## Fall grants awarded in 23 counties

For the fall cycle of fiscal year 2009, the Minnesota Historical Society awarded 27 state grants-in-aid in 23 counties. The grants, totaling \$182,383, will be used primarily to restore historic properties, create exhibits and improve access to information. Recipients are:

**Chippewa County:** Chippewa County, \$6,595, to restore wallpaper in the Olof Swensson Farmstead, listed on the National Register of Historic Places.

**Clearwater County:** Clearwater County Historical Society, \$4,001, to upgrade gallery lighting.

**Cook County:** North Shore Commercial Fishing Museum, \$3,060, for photo collection digitization and reproduction.

**Dakota County:** Dakota County Historical Society, \$1,065, for microfilm records.

**Goodhue County:** Red Wing Property Conservation Fund, \$16,088, for restoration of the Chicago Milwaukee St. Paul Pacific Depot.

**Faribault County:** Delavan High School, Inc., \$15,000, for roof replacement.

**Freeborn County:** Freeborn County Historical Society, \$2,101, for newspapers on microfilm.

**Hennepin County:** The Woman's Club of Minneapolis, \$10,000, for storm windows on the Ard Godfrey House, located in the St. Anthony Falls Historic District, which is listed on the National Register of Historic Places.

**Hennepin County:** Alliance Française of the Twin Cities, \$2,170, for hardwood floor restoration. Their building is located in the Minneapolis Warehouse Historic District, listed on the National Register of Historic Places.

**Hennepin County:** Hassan Area Historical Society, \$1,700, for an oral history project.

**Hubbard County:** Hubbard County Historical Society, \$3,600, for inventory digitization.

**Jackson County:** Jackson County Historical Society, \$1,216, for a technology upgrade.

**Lake County:** Finland Minnesota Historical Society, \$1,752, to inventory and catalog artifacts.

**Mahnomen County:** Mahnomen County Historical Society, \$135, for newspapers on microfilm.

**Marshall County:** Marshall County Historical Society, \$2,400, for "Getting Up to Speed," a computerization project.

**Martin County:** Martin County Historical Society, \$6,082, for Pioneer Museum lighting.

**Mower County:** Hormel Historic Home, \$10,000, to install an energy-efficient hot water boiler. The Cook-Hormel House is listed on the National Register of Historic Places.

**Nicollet County:** Nicollet County Historical Society, \$2,217, for an archival storage project.

**Pope County:** Ann Bickle House, \$16,597, for tuckpointing and sewer repair. Listed on the National Register of Historic Places.

**Ramsey County:** Minnesota Transportation Museum, \$10,000, for Great Northern Powerhouse stabilization plans.

**Renville County:** Renville County Historical Society, \$1,938, to microfilm township records.

**St. Louis County:** Friends of B'nai Abraham Synagogue, \$48,500, for restoration of B'nai Abraham Synagogue, listed on the National Register of Historic Places.

**St. Louis County:** St. Louis County Historical Society, \$3,500, for the exhibit "Generations of Service."

**St. Louis County:** Tower-Soudan Historical Society, \$1,122, for a system to manage cemetery records.

**Washington County:** Washington County Historical Society, \$1,250, to transfer John Runk film to DVD.

**Winona County:** Pickwick Mill Board, Inc., \$10,000, for roof restoration on the Pickwick Mill, listed on the National Register of Historic Places.

**Wright County:** Cokato Historical Society, \$294, for newspapers on microfilm.

The State Grants-in-Aid program is made possible with the generous support of the Minnesota Legislature and the Minnesota Sesquicentennial Commission. ■



Project manager Mike Blehert (left) and stained-glass artist Larry Rude examine one of 13 windows to be restored on B'nai Abraham Synagogue in Virginia with help from a state grant-in-aid.

Charles Ostrow

## Tax matters

### Have you filed Form 990-N?

The IRS estimates that half a million smaller nonprofit organizations will lose their tax-exempt status in May 2010 because they have failed to file a Form 990-N. Don't be one of them.

The Pension Protection Act of 2006 requires exempt organizations that don't meet the income thresholds for Form 990 or 990-EZ to file a new return, Form 990-N, with the IRS beginning with tax year 2007. If your organization fails to file the proper form for three consecutive years, you will have your tax-exempt status revoked in May 2010. That means you may no longer be able to accept

tax-deductible contributions, will be required to pay federal income taxes and will be subject to financial penalties if you fail to do so.

Learn more about Form 990-N at [www.irs.gov/charities/article/0,,id=169250,00.html](http://www.irs.gov/charities/article/0,,id=169250,00.html). If you do lose your exemption because of failure to file, your organization will have to reapply to the IRS for exemption. For more information about tax compliance issues for exempt organizations, go to [www.irs.gov/eo](http://www.irs.gov/eo).

### IRS workshops to be held in Minneapolis

A one-day workshop for small and mid-sized 501(c) (3) organizations will be hosted by the IRS in Minneapolis on April 28, 29 or 30 (choose one).

Among topics to be covered: the benefits and responsibilities of tax-exempt status, required disclosures, employment issues and unrelated business income.

Preregistration is required. For more information and to register (fee: \$45), go to [www.irsworkshops.eventsdesigner.com/index.html](http://www.irsworkshops.eventsdesigner.com/index.html). ■

### About this publication

The *Minnesota History Interpreter* is published quarterly by the Historic Preservation Department of the Minnesota Historical Society. Unless otherwise noted, photographs are from the Local History Services Office. Material from this issue may be reprinted with the following credit line: Reprinted with permission from *Minnesota History Interpreter*, Spring 2009, Vol. XXXVII, No. 2, published by the Minnesota Historical Society. Do not reprint material taken from another source without permission.

Readers may submit information for publication. Send to Interpreter Editor, Minnesota Historical Society, 345 Kellogg Blvd. W., St. Paul, MN 55102-1906. On request, this publication is available in alternative formats: audiotape, large print or computer disk. Back issues can be found at [www.mnhs.org/about/publications/interpreter.html](http://www.mnhs.org/about/publications/interpreter.html).

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Mary Ann Nord, Editor

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