Communication Audit
for
Junior Achievement of Washington

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Executive Summary

A communication audit was conducted for Junior Achievement of Washington to determine the effectiveness of internal and external communication related to fundraising. The findings and recommendations presented are based on a targeted audit that included an ethnographic study, interviews, survey on internal communication and a comprehensive review of external materials used to increase their organization’s profile, present a positive image and ultimately to raise funds to support their programs. The research revealed several strengths in internal and external communication and areas that require improvement to ensure the organization’s continued success. Included at the conclusion of this report are clear recommendations based on the audit and suggestions for areas that require further study to accurately determine appropriate courses of action.

Junior Achievement has clearly mastered the art of communicating with existing and potential donors, and their materials demonstrate a level of quality rarely found in non-profit agencies. The use of technology is an area that requires attention to better support internal and external communication. Of particular note was the lack of utilizing social media tools. Recommendations regarding technology are included in this report along with suggestions for further study.

The organization holds several major fundraising events each year that require considerable staff resources to execute effectively. There is a clear hierarchy in their fundraising events and the differences will be discussed in more detail later in this report.

The organization has experienced a sharp reduction in private funding during the current economic crisis resulting in fewer staff to support the same number of fundraising
events. Employees reported a wide range of responses when queried about the internal communication. Of particular concern was demonstrating agreement on the use of participatory decision making (PDM) to allow employees to feel empowered to assist in shaping the organizational goals. The organization’s leaders currently engage employees in setting annual goals but have no formal communication channels in place to continue the dialogue throughout the year. Employees feel more positive about organizations when they are better informed about progress made to accomplish common goals (Conrad & Poole, 2005, p. 145). Structured meetings are included in the recommendations section of this report. This is also an area that could benefit from further study.

This audit was conducted over several weeks and is not intended to replace a full audit of the organization’s communication tools and processes. However, this targeted audit can still be of value to the organization in determining actions to improve communication in the critical area of fundraising.
# Communication Audit for Junior Achievement of Washington

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Purpose of the Study

Effective communication is a vital component in all successful organizations. Corporations and non-profit organizations spend limited resources developing and maintaining communication strategies and intentionally focusing on the quality of interaction between their team members. Other organizations pay little attention to what could potentially be the bedrock of their success and rely instead on instinct and crisis management to communicate internally and externally. Relationships and organizations are launched and sustained through communication (Conrad & Poole, 2005, p. 9). Relying solely on strategies that launched an organization can ultimately result in their demise. An organization that anticipates changes, remains responsive and resilient, and develops proactive communication strategies can position them for continued success (Conrad & Poole, p. 400).

The approach selected to analyze internal and external communication for Junior Achievement of Washington was a limited audit. The results reveal an organization that is experiencing rapid and painful changes. Their revenue has decreased dramatically since the beginning of the current economic crisis. They are also struggling to deal with donor fatigue as their core funders are besieged by organizations struggling to weather the current financial storm. Communicating the relevance and impact of JA programs is challenging when viewed in the context of pressing health and human service requirements to support the burgeoning ranks of unemployed families who are struggling most during serious economic downturns.

The purpose of the audit was to analyze the organization’s internal and external communication specifically focused on fundraising to identify opportunities for improvement and determine clear strengths that could be used to grow their donor pool and retain the support of current funders. Fundraising is a vital function for all non-profit organizations and applying course corrections can result in a more stable revenue stream.

There was a noticeable degree of humility exhibited by the JA leadership team as they entered the audit process which is a healthy sign. Organizations that remain overconfident in the face of challenges can lead to insensitivity to situations that could be
causing their employees stress and donors to lose commitment (J. Kouzes & B. Posner, 2003, p. 262).

It is important to continuously deal with external realities and remove barriers that prevent information from flowing freely in an organization (J. Kouzes & B. Posner, 2007, p. 180). Organizations with limited internal communication stifle innovation which is the engine of success. A clear purpose of this audit was to identify communication issues and develop recommendations to create a more effective interaction between staff and with their donors.

**Organizational Description**

Junior Achievement (JA) was launched in 1919 and is headquartered in Colorado Springs, CO. Its mission is to provide students with opportunities to learn critical skills they will need to succeed in the workplace. JA programs have evolved over time but remain focused on teaching financial literacy and teaching students to contribute back to their communities by generating and managing wealth responsibly. The organization partners with the business community to engage volunteers to help students understand the relevance between what they are learning in the classroom and how that will be applied in the workplace. Volunteers also expose students to potential careers available to them which can serve as a powerful motivating force and contribute to student achievement (A. Kadlec & W. Friedman, 2007, p. 15).

Junior Achievement of Washington was launched in 1953 shortly after the end of World War II and has grown steadily. Their primary focus at the dawn of the baby boomer era was to serve students in Seattle and the surrounding communities. Their scope has expanded now to include satellite offices throughout the state. The main office in Seattle provides centralized leadership and information technology services for offices in Bellingham several hours north of Seattle and the Tri-Cities area in the central region of the state. The schools in the eastern region of the state are served by Junior Achievement of the Inland Northwest (see Figure 1 for organizational chart).
Junior Achievement of Washington currently offers programs in over one-quarter of the school districts in Washington State and reaches over 100,000 students from kindergarten through twelfth grade in both public and private schools. Programs are offered for students beginning in kindergarten to introduce basic economic concepts including the difference between what someone needs versus what they want. As students progress through the K-12 system, programs are offered at all grade levels that becoming increasingly challenging. High school programs offer students opportunities to be coached by business volunteers who help them envision and launch their own small businesses. They are also given the opportunity to visit local businesses and participate in job shadow experiences and witness how the economic concepts they have learned
about in JA are applied daily in the world of work. Many high school students also volunteer on their own time to deliver JA programs to elementary school students.

The organization leases their administrative offices in Seattle but owns and operates a facility in Auburn, approximately an hour drive south of their headquarters, where students and teachers come to experience hands-on, inquiry-based immersion programs. They recently broke ground on a similar facility in Yakima that will serve students in the central region of the state. Land was donated by businesses in Auburn and Yakima and public and private funding was secured to build and maintain the facilities.

**Research Framework**

The process used to conduct this audit was constrained by the limited about of time dedicated to this effort. A typical audit can take up to a year to complete and the researcher was given only a few weeks to accomplish the organization’s internal and external communication. It was necessary to limit the scope of the project and target the critical area of fundraising. The researcher utilized several research methods which will be detailed in this section.

**Limitations**

Junior Achievement of Washington is a large organization serving most one-quarter of all public schools in the state. Again, due to time constraints, it was necessary to target the study exclusively on specific functions within the organization. It was determined the audit would be of value if it was limited to internal and external communication supporting fundraising for the organization. The audit did not cover JA school programs, specific program content or communication with community volunteers. Members of the program staff were included in this audit only as it relates to their involvement with fundraising for the organization.

**Scope**

The scope of the audit included both internal and external communication. Research was conducted on different methods of communicating including interpersonal conversations, meetings, and print materials used for fundraising purposes. Interactions
between the staff were observed and will be discussed along with analysis of communication with donors. Communication between JA staff and teachers, school administrators, students and volunteers also fell outside of the scope of this study.

**Methodology**

The methods selected for this audit included a limited ethnographic study, interviews, questionnaire surveys and a comprehensive review of materials used to support fundraising. Internal communication processes and tools were also reviewed for the audit including participation in goal setting, performance reviews and meetings held to capture lessons learned following major fundraising events.

It is important to note that respondents to the survey were informed in advance that their responses would be strictly confidential and only aggregated results would be presented with the final recommendations.

**Research Tools**

Selection of research tools was influenced by the availability of staff and timing of major fundraising events. A variety of tools were used to ensure the audit was as comprehensive as possible within the limited time allowed for this activity.

**Ethnographic Study**

Before the JA staff was informed about the audit, the researcher was invited to attend two fundraising events. The first event targeted, in the words of a staff member, “the important heavy-hitters” of the business community. The invitees included over 300 current business leaders and many retired executives who remain active in JA. The second fundraising event was held on a Saturday evening at a nearby destination resort casino. The second event commanded $1,000 per attendee so that limited attendance exclusively to the major individual and corporate donors.

**Internal communication interviews**

Interviews were conducted separately to ensure confidentiality. Each guest was briefed in advance that they would asked a series of questions regarding internal communication related to fundraising and that their answers would be held in strictest confidence. The senior vice president responsible for marketing and development was
interviewed along with the director responsible for fundraising events and the corporate relations director (see Appendices A & B for interview questions.)

**Internal communication survey**

In addition to the ethnographic study and interviews, a questionnaire was used to gauge employee attitudes about internal communication, focused on fundraising. The respondents were encouraged to be open and direct with their answers. A statement assuring the respondents that their answers would be held in strictest confidence was intended to elicit a more accurate picture of internal communication. The questions in the survey covered setting annual targets for fundraising, the use of electronic communication, internal meetings and clarifying responsibility, authority and accountability when participating in fundraising activities (see Appendix C for survey questions).

The researcher intentionally provided a short amount of time to complete the surveys anticipating this might encourage more authentic responses and to eliminate the opportunity for employees to discuss their responses with each other.

**External Communication Reviews**

A thorough review of external communication was conducted and included electronic and print materials in addition to signage used during events and at the JA facility in Auburn, WA.

**Website.** The researcher reviewed the JA’s international website in addition to the local site to determine continuity of messaging and standard templates for information. The templates for the website are provided by the JA international office in Colorado Springs, CO and the content is updated by JA staff in Seattle. JA does not maintain an internal website for their employees so the website review was limited to external communication supporting fundraising.

**Social media.** The only social media being used by JA at this time is Facebook. They have a Junior Achievement of Washington Facebook page that is maintained by the administrative staff in the Seattle office.
Electronic invitations. Invitations are e-mailed for events targeting individual donors. The electronic invitations are forwarded to people in the organization’s database and include volunteers, company representatives who recruit volunteers and also educators.

Electronic confirmations. Electronic confirmations are sent following confirmed registration for events.

Printed invitations. Printed invitations are used for major fundraising events targeting large individual donors and corporate partners. Included with the invitations are formal reply cards and preaddressed envelopes.

Printed confirmations. In addition to the printed invitations and reply cards, JA also sends formal printed confirmations to attendees registered for the event.

Auction catalogs. Auction catalogs are produced for the major dinner/auction fundraising events. Included in the catalogs are pictures and detailed descriptions of the items donated by corporations and individuals, including the value of the item. Catalogs are printed well in advance of the event and mailed with the printed confirmation.

Auction packets. Attendees at dinner/auction events are provided an envelope when they register which includes a badge with the event logo, auction catalog, auction number, pens and additional promotional materials.

Signage. Event signage is used for formal and informal fundraising events. Signage is also used at the facility in Auburn, WA in support of small fundraising events. Event and building signage was included in this review.

**Major Findings**

The findings are based on an audit conducted during a short period of time with limitations shared earlier in this report. Findings will be presented in detail but the researcher encourages readers to refer to the end of the report for specific recommendations and areas that will require further study to determine appropriate courses of action.

It is important to note that the JA leaders provided the researcher with unimpeded access to their materials and staff to conduct this audit. The level of openness was refreshing and resulted in more quality findings than would have been possible without
their full cooperation. There was a noticeable degree of humility reflecting a genuine desire to create a confrontive strategy encouraging team members to deal with issues directly (Conrad & Poole, 2005, pp. 325-329).

**Ethnographic study**

Observing the JA team in situ proved to be a valuable primer for the more comprehensive audit. The researcher found the JA staff to be very professional, positive and eager to interact with the people attending their events.

Typically at events there are long lines at the registration tables. The events attended demonstrated a keen interest on the part of JA to ensure business guests and major donors were not subjected to unnecessary delays. The registration desks were well staffed and when lines did begin to build, JA staff would step in and assist individuals with the registration process.

The JA staff members were keenly alert during the receptions prior to the event and kept watch for guests that might be socially awkward or standing alone. They tagged up with individuals and made it appear natural when they introduced them to others or intentionally assisted them in joining conversation groups. There was an air of authenticity that made the guests feel comfortable being guided to interact with others.

Non-verbal communication was strong and included professional posture, attire and extroverted dialogue. Clearly the expectation for JA staff was to be proactive and greet guests when they entered and ensure they were comfortable.

The use of students at fundraising events was very visible. For instance, during the dinner auction students carried around a Golden Retriever puppy to the tables prior to it being auctioned off. The combination of students and a puppy helped facilitate the dialogue with the adult guests. Several staff members were observed guiding the students around to introduce them to funders and ensure they were comfortable in the roles they were being asked to do. The staff appeared equally focused on the comfort of the donors and the students in attendance.

The level of commitment educators had to the program was evidenced by students staffing the event during school hours. The students had been coached to greet each
guest personally so no one passed the top of the escalator without a personal greeting and thank you expressed by the students for supporting JA. This did not in any way feel artificial or awkward but instead came across as very genuine.

The placement of the tables and use of table settings and decorations communicated the degree of formality and hierarchy evident at the events. The breakfast event clearly recognized major donors by the placement of their tables close to the stage. At the dinner/auction, the formality of the black-tie event was reflected in the table settings and table decorations.

The message at the dinner/auction was clearly communicated that the organization did not spare any expense to entertain their guests and, by extension, the guests should feel encouraged to donate generously. By the end of the evening, balloons tied to chairs of major donors was a playful but effective way of communicating appreciation and recognition in the ballroom.

**Interviews on internal communication**

Personal interviews were conducted with the Senior Vice President of Marketing and Development, Director of Grants and Planned Giving and the Special Events Manager (see Appendices A and B for interview questions). The senior vice president has ultimate responsibility for all fundraising at JA. There were three separate interviews conducted with the senior vice president to allow the researcher time to thoroughly explore issues that surfaced as a result of the dialogue. Questions were added to the interview with other team members to mine information to inform the audit recommendations.

**Senior Vice President.** The senior vice president was very generous with her time and expressed a sincere desire to use the information from the audit to improve the organization. She expressed concern throughout the interviews about how short staffed they are at JA due to the budgetary impacts resulting from the current economic downturn. The potential for employee burnout is a real threat to retaining the current staff and improving morale. The senior vice president is dedicated to spending as much time as possible checking in with her team leaders, providing prompt responses to their
questions and removing any barriers that may emerge so they can focus on their work. During the course of one interview, she requested time to respond to an inquiry by the special events manager. After the call she explained she didn’t want to be the person standing in the way of her people having information they needed to do their jobs. The call lasted just a few minutes but she was able to provide all of the information needed to allow the special events manager to continue his work. She mentioned several times how much they rely on the staff members that have been in place for a long time to manage their events and work-statements. An impressive 70% of their processes are documented which allows continuity of work when there is a transition in staff.

There is a strong emphasis on identifying what JA team members like to do and making staff assignments based on their preferences. The example was given of an employee who was not a golfer and was staffing an event when a golfer got a hole-in-one. The people who were watching the accomplishment were elated however the JA staff member clapped politely. In the project debrief the team member said they really prefer to not be on the course where they are expected to know the game and react accordingly. The employee has since been moved to supporting the dinner celebrations after the golf events and is quite happy with the assignment. This is a small illustration of the level of concern placed on matching employee interest to assignments. The benefit is really two-fold since the employees are happier and the donors are receiving the proper level of recognition when they accomplish something during the event.

The use of technology was a recurring theme. In particular, the senior vice president expressed a desire to find the time to use the tools they currently have and identify others that could help them better track their work. There is an interest in using project management tools that will track major tasks and the budget associated with events. Another area discussed was the need to embrace the use of social media. JA does have a Facebook page but it is underutilized as a marketing and fundraising tool. There is no use of YouTube videos and the organization does not currently use Twitter or other more immediate messaging tools. In the past, they had an employee with excellent information technology skills but that person is no longer with the organization due to
budget cutbacks. Since their departure, the use of social media has been a lower priority although occasional posts are made to the Facebook page.

There is a strong emphasis in the organization to clearly define roles and responsibilities at the time they hire employees and reinforce that during annual performance reviews. She mentioned she has the president meet with her team and they develop goals together and then flow those down in the organization. This direct communication was implemented after hiring staff who were uncomfortable fundraising and had to be let go.

The personal stories of students who have benefit from their programs are shared frequently and take on a somewhat sacred quality. The employees who have been with the organization for a long time intentionally share stories of individual students similar to a Native American storyteller. The result is a connection with the work that is intensely personal. The senior vice president’s passion came through during the interviews and she admits there are emotional moments in the office when stories are shared or major donations are made. Communicating that passion is a powerful way to demonstrate to employees the value of the work (Kouzes, J. & Posner, B., 2003, p. 188).

A substantial amount of time was spent discussing how the age of board members impact the way they view JA’s responsibility in communicating about events. For instance, older board members who have held senior executive positions in organizations will invite friends to formal events and then call JA with the names and addresses so invitations can be mailed out. Younger board members who hold executive positions or may work in smaller organizations strongly prefer e-mailing invitations and request electronic copies of the invitations and confirmations. Further discussion about printed invitations will be discussed later in this report.

One final area explored during the interview with the senior vice president was the percentage of the organization’s budget that is spent on fundraising. The target is 10% but that can raise as high as 15% depending on the event. After exploring this more it became apparent she was confused about the actual amount spent on fundraising. She was unable to explain what is included or excluded when determining the amount spent
on fundraising. For instance, printing costs are substantial when producing the quality of materials required for their major fundraising events. However, printing costs are not included in the fundraising expenses but instead are included in their administrative budget.

**Director of Grants and Planned Giving.** All major non-profit agencies have grants managers responsible for mining sources to target fundraising efforts. The fact that JA has a director who is also responsible for planned giving indicates a more sophisticated strategy. JA actively encourages major donors to name JA in their wills or to donate stock certificates. The interview with the director confirmed a sophisticated fundraising approach as she explained the level of “data mining” she conducts as she conducts her research. She analyzes demographic data and funding guidelines to identify potential funding from local, state and national organizations. Her work is somewhat solitary which she strongly prefers.

Technology is used very little to track her work. She relies almost solely on a large calendar on the bulletin board in her office, hanging files on her desk and handwritten notes. The processes in her area are not thoroughly documented and she saw little need for documentation.

Her involvement in fundraising events is limited to tasks on the day of the event. She mentioned it is difficult for her to keep her energy level high when she is interacting with donors at events. Introversion is something that suits her in her daily tasks but becomes a barrier when she has to greet the public. The portion of her job she is least happy with the time spent in staff meetings and managing relationships with donors.

The director had little interest in being involved in setting goals for the organization. She indicated she trusted the organization’s leaders to set the right goals and communicate those to her so she could do her work.

**Special Events Manager.**

The special events manager was hired specifically to manage the major fundraising events throughout the year. He is responsible for four major events; a dinner/auction and three golf events. His responsibilities include all aspects of planning
and managing the event, including briefing JA staff about their assignments and supervising volunteers. He works closely with the senior vice president to ensure staff assignments align with their preferences. A staff member was recently hired to handle the bowling fundraiser and he anticipates he will be called in to support that activity after his next major fundraising event in April. He appeared very willing to pitch in where needed but does operate as an independent contributor.

The need for formal staff meetings was discussed and he didn’t feel that was needed. He has extraordinary access to the senior vice president and they speak several times each day. His role is key in raising the majority of private funds for the organization so the level of access is understandable.

He appears to make very good use of technology when communicating about the events he manages. There is a clear preference in using e-mail instead of sending voicemails or phoning people about action items. He uses e-mail as a tracking tool to ensure assignments that have been delegated are documented and completed.

One surprising finding during the course of the interview was around the discussion of setting goals for the organization. Even though the special events manager has unprecedented access to his senior vice president, he indicated he had very little influence on setting the overall goals for the organization.

**Survey on internal communication**

A survey was completed by six employees in addition to interviews with the three leaders mentioned above, providing input from all staff members working at least 50% of their time on fundraising. The respondents represent 30% of the entire JA staff and nearly half of the team working in the headquarters office. The results of the individual survey questions are discussed below.

Once again, it’s important to note while reviewing the survey results that employees were given assurance their answers would be confidential. The comments shared in the survey and the ability of one employee to share very low marks and feedback indicated the value of allowing people remain anonymous in the process.
The senior vice president shared her passion for JA and linked many intangible benefits to working in the organization to the feeling of connection with the mission of the organization. Based on the survey results, the employees clearly understand the mission of JA. It was not clear from these results if they understood the overall mission of Junior Achievement or if the organization they were referring to was their workgroup. However, the results demonstrate a strong understanding of the mission which is a powerful motivator (see Figure 2).

**Figure 2. Understanding the organization’s mission**

Access to and the flow of information was listed as highly important by the senior vice president, grants director, and special events manager. All employees responded favorably with all saying they agree or strongly agree their co-workers share information that helps them in their work (see Figure 3).
The results of engagement in decisions that impact individual employee’s work was less decisive. Employee responses were mixed with one employee expressing a strongly negative response (see Figure 4).

**Figure 3. Information sharing**

2. My co-workers share information that helps me in my work.

- 1: Strongly disagree
- 2: Disagree
- 3: Neutral
- 4: Agree
- 5: Strongly agree

**Figure 4. Participatory decision making**

3. I am involved in decisions that impact my work.
The next question focused on whether or not the employee felt their supervisor listened to them. Results were varied with both negative and neutral responses. Review of the comments submitted by employees indicate this question was used to express frustration about the level of demands on their supervisor’s time. They felt they had adequate access to their supervisor. However they felt their supervisor was unable to concentrate on developing longterm strategies or planning for upcoming projects due to multiple job responsibilities and “fire drills” (see Figure 5).

**Figure 5. Supervisor listening skills**

4. My immediate supervisor listens to me.

One way employees feel they are valued as professionals is by being encouraged to be innovative and come up with new ways of doing their work. While the results were positive, there is still room for improvement (see Figure 6).
Figure 6. Innovation

5. I am encouraged to suggest new ways of managing our work.

Providing feedback to employees about their work encourages continuous improvement in an open, supportive environment. Most JA employees who were surveyed shared that they do receive constructive feedback on their work (see Figure 7).

Figure 7. Feedback
During the interviews conducted by the researcher, the topic of regularly scheduled meetings was explored. It became apparent that staff meetings have been discontinued due to the demanding workload. Meetings are pulled together hastily and seldom have an agenda. Based on the results of the survey more structured meetings would be welcomed by several staff members (see Figure 8).

**Figure 8. Meetings**

![Figure 8](image)

A clear majority of the staff feel technology is not fully utilized to help them in their work. This was foreshadowed during the interviews with the organization’s leaders (see Figure 9).
All employees surveyed expressed their pride in working for JA which is an area that can be viewed as a clear strength (see Figure 10).

Figure 10. Organizational pride
The final question was added to determine if prior involvement in JA programs as a student would influence survey scores. One respondent was involved in JA while they were a student and that person scored higher than their peers. In fact, using strongly agree for most questions (see Figure 11). While this is not definitive it is an interesting point of interest that may inform future hiring decisions.

**Figure 11. Prior involvement in JA**

![Pie chart showing 83% no and 17% yes for participation in Junior Achievement programs when the student was a student.]

**External communication**

There were several findings that surfaced during the review of external communication tools and materials that resulted in audit recommendations or surfaced areas that require further study to determine appropriate actions.

**Website.** A review of JA’s website demonstrated clearly their primary target audience is large corporate funders or foundations. The site is organized like a business website and does not resemble non-profit websites of comparable organizations reviewed during the
course of this audit. The material is easy to find and organized extremely well although the graphics are not very engaging. The format conforms to the standard set by JA’s international office and it is unclear how much flexibility they are given to modify and introduce more creative ways of displaying the information.

Banners for upcoming fundraising events on the website’s homepage grabs the attention of visitors. A review of all upcoming events revealed a very interesting finding. The graphics used for events targeting volunteers and individual donors had a cartoonish appearance when compared to the quality of the images used to advertise events targeting large corporate, foundation and individual donors.

**Social media.** The Facebook page has few entries and the ones that have been added do not invite people to engage in dialogue. There are less than 200 people who indicate they like the page which is surprising based on the number of people engaged in JA programs. The researcher noted that several students were commenting on posts that announced when their schools had participated in an event at the Auburn facility. This is a clear indication that the site could be used to engage JA students and perhaps younger volunteers and donors.

**Electronic invitations and confirmations.** The use of electronic invitations and confirmations was reviewed and the quality was excellent. The files have been condensed so they will not overload small inboxes. The information is formatted efficiently and allows the viewer to easily view important information about upcoming events including date, time, location and attire. The registration fee for attending events
is clearly visible and it is also communicated if donations will be requested during the event.

**Printed invitations and confirmations.** The quality of the printed invitations and confirmations rivals any Fortune 500 company. The paper used for printing is of the highest quality and the graphics are highly professional.

There is a question of the effectiveness of the printed materials. The invitations that were mailed to people invited to attend the recent dinner/auction resulted in a 1% return rate of the reply cards. When I asked the senior vice president about the need for reply cards and she indicated she had been told by their president it was important to maintain the “appearance of affluence” if they were to draw the wealthy individual donors to the events that cost over $1,000 per person.

**Auction catalogs.** When attending the dinner/auction, the researcher noted that approximately 30% of the attendees brought the auction catalog with them that had been mailed to their homes and only a handful of people had actually reviewed the items and made notes in advance. Most attendees used the catalogs provided in their auction packets. There has been dialogue about sending out electronic copies of the catalog prior to events but that was viewed as not presenting the desired “appearance of affluence.”

**Auction packets.** The auction packets are comparable to ones provided at similar events. They are professional and convey a sense of respect for the people attending since everything they need to navigate the event or plan for the auction is included.
Signage. The signage for fundraising events is at the standard of excellence held by the JA staff at their events. The signs effectively communicate where to park, register and where guests will be seated.

Recommendations

Several recommendations emerged after reviewing the internal and external communication tools and processes in place to support fundraising in JA.

Staff meetings

A recurring theme during the interviews and in the survey responses was the need to improve efficiency of meetings. Scheduling regular staff meetings and including agenda items from the team will address several concerns raised in the survey comments. First, the employees will be given a chance to air concerns in a group setting. Also employees who feel they don’t have enough access to their direct supervisor or who feel their supervisor is distracted due to conflicting responsibilities will have a chance to count on staff meetings as a time to connect. Well run meetings give employees a chance to connect as a team and conduct business together. More importantly, the sense of participatory decision making can have a powerful impact on employee morale (Conrad & Poole, 2005, pp. 144-146).

An additional recommendation is to schedule informal staff gatherings periodically. Staff burnout is a concern and the workload in the team is extremely heavy due to the inability to hire additional staff. Several comments employees shared when they were surveyed indicated a desire for more access to their supervisors. Informal activities provide team members a chance to interact with each other outside of the
workplace and also an opportunity for employees to visit with their managers in a less formal and hierarchical setting. While planning these gatherings may seem artificial, it’s important to note that work does occur in informal settings as well as in the office.

**Utilize technology to manage work**

Implementing project management tools will provide visibility and tracking needed to manage multiple projects and limited resources. One advantage of using project management tools is that others will have access to the project files to determine progress. Another way to utilize technology is to implement the new software tools as quickly as possible that the JA international office is developing for analyzing data on current donors and prospecting for new ones. The grants director is conducting a lot of prospecting work manually and introducing new technology solutions could improve the cycle time of identifying potential donors and applying for grants in a timely manner.

**Prioritize events**

Donor fatigue is common in organizations that rely on a core group of contributors. One way to deal with the fatigue is to prioritize events. Determine if there are events that could be combined or eliminated based on the historical data available. The key is to analyze data that clearly demonstrate the effectiveness of each event. If an event is not generating revenue, it is possible to make the case for discontinuing it.

Another opportunity to address a concern that came up during the interviews is to present opportunities once a year to major donors. It is easy for donors to feel overwhelmed when organizations come to them repeatedly throughout the year for sponsorships. Developing a cohesive package once a year makes it clear that you value
the donor’s time and do not want them to feel they are being taken advantage of because of multiple requests. In the case of individual donors, an annual letter could be sent providing timing of the various planned events so they understand what to expect when they are approached for support. Effective communication is the key to minimizing donor fatigue.

**Focus on social media**

Communication options available in social media will undoubtedly yield results. Capturing fundraising events on video clips and posting on the website or on YouTube will capture the zeitgeist for people unable to attend and will in turn generate interest and excitement.

JA’s Facebook page is currently underutilized and could hold the key to engaging a broader group of smaller contributors. By engaging students on Facebook to tell their stories will inspire others and support the organization’s more traditional fundraising efforts.

**Printing costs**

The use of print materials to give the “appearance of affluence” is clearly effective however closer examination is needed to determine the effectiveness of the current process. For instance, if only 1% of reply cards are being returned for major fundraising events, perhaps those should be eliminated. It may also be possible to better utilize technology for the registration process. There are lessons to be learned from the use of electronic invitations and confirmations for less formal events.
Areas of Further study

Technology

A recurring theme throughout the audit process was the need to better utilize technology to support fundraising efforts. The comments covered project management tools, systems used to identify potential donors, event registration and social media. This is an area that requires additional study. The researcher recommends discussing options with corporate donors involved in information technology fields.

Performance management

A final area that could require further study is the performance management process. Engaging employees more fully in the process of setting goals and monitoring progress could have very positive results. Again, corporate partners may be a good resource to turn to for ideas and in-kind support.

Junior Achievement of Washington stands poised to make minor adjustments that could result in substantial costs savings and additional revenue. Implementing the recommendations in this report and conducting further studies could assist JA in weathering the current economic crisis and position the organization for success well into the future.
References


Appendix A. Interview questions for senior vice president

1. Explain how you involve staff in planning a fundraising event.
2. How does your board engage in planning an event?
3. What type of project management tools do you use?
4. How do you determine how to divide the tasks between staff members?
5. How do you explain responsibilities to your staff?
6. What tools do you use to plan your projects?
7. How often do you meet with the staff to discuss progress?
8. What percentage of your budget is spent on fundraising?
9. Describe ways you would improve the planning process for fundraising events.
10. Describe how you would improve staffing for events.
11. Describe your most successful fundraising event.
12. How did you document what went well on that event?
13. Describe your most difficult challenge with fundraising.
14. Describe how you use the following during the planning process:
   a. Team meetings
   b. E-mail
   c. Voicemails
   d. Informal conversations
15. How often do you send e-mails to staff after normal business hours?
16. How often do you leave voicemails for staff after normal business hours?
17. How do you work to prevent burn-out with your team?
18. If you could change one thing tomorrow about your fundraising process, what would it be?
19. What would you recommend to cut down the cost of fundraising?
Appendix B. Interview questions for director and manager

1. Explain your role in fundraising for Junior Achievement.

2. Describe the responsibilities you have in planning for the upcoming fundraising event.

3. Were you involved in deciding assignments for the event?

4. Describe your responsibilities during the upcoming event.

5. What are your concerns about the upcoming fundraising event?

6. Describe how you track your tasks when planning for an event?

7. Describe how you use the following during the planning process:
   a. Team meetings
   b. E-mail
   c. Voicemails
   d. Informal conversations

8. How do you voice concerns about a project?

9. What do you do to prevent burn-out?

10. If you could change one thing tomorrow about your fundraising process, what would it be?

11. What would you recommend to cut down the cost of fundraising?
Appendix C. Internal communication survey questions

Rating scale:

<table>
<thead>
<tr>
<th>Strongly Disagree</th>
<th>Neutral</th>
<th>Strongly Agree</th>
</tr>
</thead>
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<tr>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>4</td>
<td>5</td>
<td></td>
</tr>
</tbody>
</table>

1. I understand the mission of the organization.
2. My co-workers share information that helps me in my work.
3. I am involved in decisions that impact my work.
4. My immediate supervisor listens to me.
5. I am encouraged to suggest new ways of managing our work.
6. I receive constructive feedback on my work.
7. Meetings in our organization are run effectively.
8. Technology is used efficiently to manage our work.
9. I am proud to work for Junior Achievement.

10. I participated in Junior Achievement programs when I was a student.
    
    Yes    No
Appendix D. JA website homepage
Appendix E. Examples of event graphics