

**VOLUME 16**  
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# **Grassroots**

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# **Fundraising**

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# **Journal**

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Unhealthy  
Organizational  
Dynamics**

**Hiring a  
Development  
Director**

**Everything  
I Know about  
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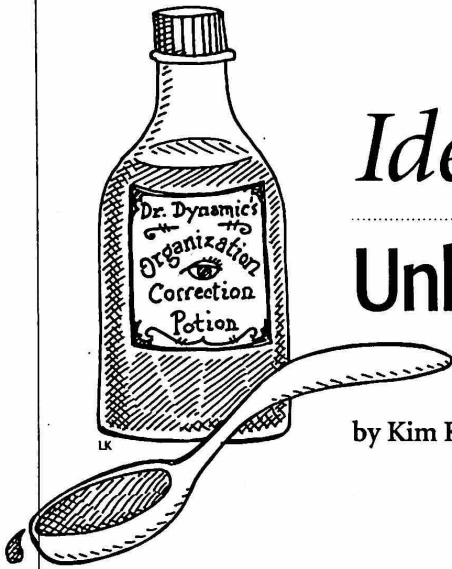
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# Identifying and Correcting Unhealthy Organizational Dynamics

by Kim Klein

**M**any times when small nonprofit organizations have trouble raising the money they need, the director calls me, saying the problem is that the board doesn't take its fundraising role seriously, or that the board is having problems raising money, or asking if I know a "really good development person" they can hire. Often, these are not the problems at all. Here are three true stories, although the names and locations have been changed.

1. The finance committee of the Board of Women Want Work (W3) is holding an end-of-year meeting to review their financial picture. This year's budget was \$150,000 and the executive director has recommended increasing it to \$250,000. Here's the picture they see.

Last year's actual income was \$110,000. The board raised only \$20,000 of their goal of \$25,000 and foundation funding fell short. Expenses were reduced to \$105,000 by postponing hirings, having the good fortune to receive a donated a computer system rather than purchasing one, and imposing some cost-cutting and frugality measures.

Despite this year's faltering fundraising performance, the executive director believes she can raise from foundations the extra \$100,000 she wants in next year's budget. She also thinks the board's fundraising goal should be increased to \$50,000 and that the remaining \$100,000 will come from current donors.

Board members Brenda and Rosita (two of the five finance committee members) express their doubt that W3 can grow this fast, especially in light of last year's experience. Rosita believes the board will be demoralized by a \$50,000 goal, and that a more appropriate goal would be

\$25,000 or \$30,000 at the most. Brenda thinks counting on foundations for so much money is foolish.

The remaining three finance committee members do not counter these arguments. One says, "We must have confidence in Julie (the executive director). The second says, "Julie always manages. Look how well she did with last year's budget. We ended up with \$5,000 carryover even though we were \$40,000 below projected income." The third says, "Budgets don't mean that much. They are just ideas of what might happen." Brenda asks Julie what she thinks. "I think I can manage the budget," she says. "If the board does its job everything will be fine." The chair calls for a vote on the budget and it is passed with 3 voting for, Rosita voting against and Brenda abstaining.

Several months later, as the board struggles with its fundraising responsibilities, Rosita resigns, followed by Brenda. Two other board members leave soon after.

2. Across town at People for Pure Air, Matthew, a new board member with quite a lot of fundraising experience, is attending his second meeting. The Annual Campaign is being discussed. The chair of the development committee is urging each board member to write personal notes on 50 of the form letters going to donors being asked to renew. Matthew suggests possibly following up those notes with phone calls. "We have never done it that way," says the development chair. "We have always done it this way," says another board member. "It works pretty well this way," says the executive director, and the meeting proceeds, with Matthew wondering to himself if he was too overbearing in his suggestion.

3. The fundraising plan for the Children's Learning Center is to be presented at tonight's board meeting. The development director asks (again) if she can go to the meeting and present it herself. The executive director thinks it is not a good idea. "It is important for the board to have just one staff person to deal with, and I can present this plan," he says. The development director sighs, but agrees not to go.

At the meeting, the executive director recommends passing only part of the plan, and the board agrees with his recommendation. Later he explains to the development director, "I tried to get them to understand the whole plan, but they were adamant. Sorry." He reasons to himself, "She wouldn't listen to me, but she has to accept the decision of the board." Even later, two board members who know the development director are puzzled at her coolness to them when they visit the office for a meeting. A few months later, she leaves, telling the director that she needs to work in an organization where she has more access to the board. He tells the board that she has quit because she needs more time with her family. She is the fourth development director in two years, which some board members find puzzling, but don't know how to evaluate.

### ***What Is the Problem?***

Working in small nonprofits almost invariably means having too much to do, and being human means that we look for simple solutions to problems. The first step in finding a simple solution is to make the problem seem simple. A common analysis is that the problem is with the board. They (pick one or more) don't understand their role, have many new members, need to be more comfortable asking for money.

Unfortunately, the problems revealed in the scenarios above are not simple and simple solutions will not fix them.

The first step in finding a real solution to a problem is to identify the problem properly. Failure to raise the money you need, or problems getting the board to do its job in fundraising often point to an unhealthy organizational culture. We can identify three common dynamics in the examples above that will take their toll on fundraising and on the overall health of the organization.

**1. Dissent is perceived as criticism of a person.** In the first example, the board members who disagreed with the budget increase were told they did not have faith in the director. Many organizations suffer from a dynamic in which one person (and sometimes more than one) is seen to know best for the entire organization and the board relinquishes their power to this person. Sometimes this person is the founder of the organization, sometimes the chair of the board or a particularly powerful board member; often it is the executive director; occasionally it is the whole staff (in the case of a small staff) or the entire development committee. With this dynamic, one person takes on a huge amount

of authority and responsibility and everyone else lets them. If they advance an idea or are in favor of one, their opinion carries inordinate weight. All decisions are then perceived in terms of being for the person or against them. Discussion of the content of an idea becomes impossible.

**2. Conformity is the highest value.** Here there is no one person whose feelings are at stake, but there is little room for making change. In organizations that do not have the imagination to go beyond what they've done in the past, suggestions or new ideas are seen as unhelpful or even a hindrance. People making suggestions are handled politely but firmly. Eventually, either they cease to bring up new ideas or they are labeled as troublemakers and made to feel marginal.

**3. The executive director doesn't tell the truth.** If a director wishes to avoid confrontation or cannot maintain his or her authority legitimately, he or she will play the board members against the staff. By not allowing staff access to the board (an increasingly common practice), the director is the sole interpreter to the staff of what the board says and to the board of what's happening with the staff. In organizations where board members are not recruited from the constituency, individual staff members are unlikely to know board members personally, and neither side has any way to check on the veracity of what they are being told. Usually the director has convinced him or herself that his or her actions are justified, and that it doesn't really matter if what he or she says is not exactly true — the work of the organization is what is important.

You can suspect that one or more of these dynamics is in play when board members routinely leave before their term is up, citing lack of time or overcommitment, and/or staff turnover is high, particularly in the development function. High staff or board turnover can also disguise another problem, which is that some people never leave. New people come and go, but the old guard remains. Rigid lines of communication and strict hierarchy spell cover up. While legitimate compliance with accepted customs is appropriate, servile surrender to tradition is a sign of a problem. Lack of participation on the part of those with new ideas or new ways of thinking is the outcome here.

You may be thinking, "Well, I have half of problem one and part of problem three." Like English ivy on a fence, these dynamics intertwine and wrap around each other, so that separating each strand is impossible. To describe them is, by necessity, to oversimplify.

### ***Individual Solutions***

What can be done if you identify one or more of these problems in your organization?

First, follow the Quaker adage, "Assume good intent." It is quite probable that no one deliberately wants to inflict these dynamics on an organization; most likely, the prob-

lems have grown over months and years of people letting them go by unrecognized. People may have had a sense that something was wrong, but did not know what it was. Many people are willing to assume that their discomfort is "just me" or that "everyone else seems fine with it" and try to change themselves to fit the dynamic rather than questioning it. Seeing that there is a problem is half the battle.

So the first step is trying to identify exactly what is going on. Let's say you are Brenda or Rosita in the first situation. You need to document in writing all the times that you raised a point of discussion and were told to "have confidence in the director." Then, make it clear that in each instance you were not evaluating the director, but the proposal she had put forward or championed. Leaving the board, while understandable, reinforces the notion that you did not like the director.

Let's say you are a board member in the Children's Learning Center described in situation #3. You wonder if an organization having four development directors in two years is normal. What can you do? You can call around to other development professionals or to your local fundraising trade association, such as the local chapter of the National Society of Fund Raising Executives. You can read in the literature about fundraising staff (check with your Foundation Center Library or Cooperating Collection). Your reading and calling leads you to think such turnover is unusual and possibly a sign of an organizational problem. You can then ask the personnel committee to institute a policy to conduct an exit interview with all staff who quit. This will probably surface the problem, and now the board can begin to deal with it.

Welcome dissent. People who disagree are involved and care what the outcome is. When disagreement is welcomed and seen as helpful, the person disagreeing can do so without resorting to personal attacks or without feeling defensive.

Be willing to ask if you can try something yourself. At People for Pure Air, in situation #2, Matthew could have asked if he could call some of the people whose letters he notated. He could then report his success at another meeting. If he could get one or two other board members to call as well, he could change the tradition. In situation #3, the development director could ask ahead of the board meeting if she could call the treasurer to discuss her plan, or she could simply send a copy of her plan to the whole board so they could see it before the meeting, and ask them to call her if they have questions. Asking for this might elicit a negative response from the executive director, but it might also force the director to be straightforward in his disagreement with part of her plan.

Be willing to question procedures. For example, Rosita and Brenda could question why the budget gets passed on a majority vote. Something as important as a budget perhaps ought to be concluded only by consensus. The way your orga-

nization does things may not be the way everyone does them.

Finally, recognize that one person cannot change a dynamic. The majority of people in the group have to recognize the problem and agree on a plan to work on it. Even then, it will be difficult. You don't just see the problem, agree to fix it, and then it's fixed. Old habits die hard. Going back to the vine analogy, finding the root of the vine is a more useful thing to do than unwinding all its many strands, but even then, digging it out completely can take a lot of time and several attempts.

## Organizational Solutions

One organizational solution to many problems is to make sure there is money in the budget and time set aside to send staff and board members to trainings on effective board functioning. Board members' experience in working with a large group of people often comes only from their family, their workplace, their high school marching band, their bowling league or any number of other places where the rules and regulations are inappropriate to a healthy board. Having no other experience, they default to what they know.

Executive directors should receive management training. Thousands of executive directors have been so successful with their organizations that the organization has grown past the director's ability to run it. A director in an organization with one or two other staff people doesn't need much supervision experience, but as soon as there are three, four, five, ten staff, he or she does. If a director is used to being competent and used to being perceived as successful, it will be hard for that person to ask for help. He or she will feel inadequate, but cover this inadequacy with rigidity. Sometimes people don't know what they don't know, and they are utterly unaware of the consequences of their actions. Management training can expand an executive director's understanding of their job immeasurably, before a situation becomes personalized within the organization.

Third, bring in management consultants or meeting facilitators to help separate content from personality, so that issues can be fully discussed without rancor. Sometimes a person needs help with how they express disagreement, and often people need help hearing disagreement. Some problems are cultural. For example, a friend of mine moved from her home state of Alabama to New York. Working in a nonprofit group there, she felt people in her organization were always fighting and making fun of each other until she realized that the New York style of direct communication and brusque interchange is very different from the Southern style of gentle politeness.

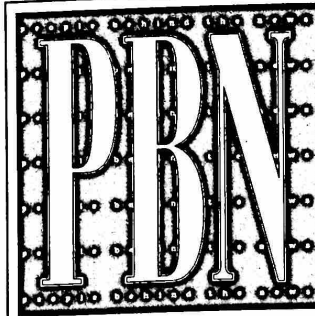
Sometimes problems arise from lack of clarity about how meetings are run. Someone who believes he should raise his hand and be recognized by the chair before speaking will feel unacknowledged and disrespected in a group where other people just speak up whenever they want.

## Problems Happen

I once participated on a board where a sign was posted in the boardroom: "Watch out! Feelings are everywhere." It was a helpful reminder that no matter how well intentioned we are, how good our political analysis, how sterling our history of work on the issue, we are still insecure and vulnerable and we can lash out at others who are similarly insecure. Add race, class, gender, sexual orientation and capitalism run amuck to the mix and you see where there could be some problems.

If your organization doesn't have problems, it is not a group. Groups have problems. Ideally, they have new problems every so often, and they learn from their problems. Facing the problems can be a source of creativity, fun and ultimately solidarity.

Creating a lasting institution, which is what most of us are trying to do with our organizations, requires letting go of the idea that you cannot be replaced, and requires embracing the fact that once you leave, in a year or two you will be all but forgotten. Creating lasting institutions means welcoming all kinds of people and personalities and working hard to work together. As feminists of the 1960s and 1970s taught us, process is part of the product. **GFJ**



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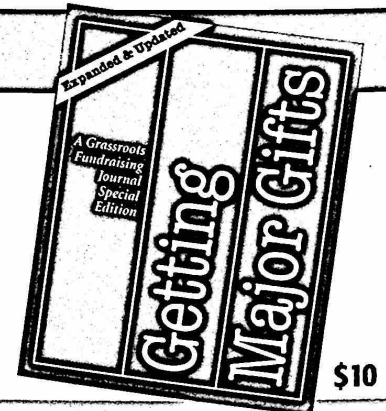
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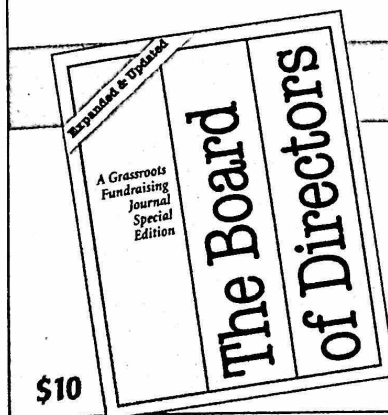


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- Building an Effective Board of Directors
- Recruiting Better Board Members
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- 56 Ways for Board Members to Raise \$500
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# Hiring a Development Director

by Kim Klein

*The Journal hasn't covered the topic of hiring development staff in a long time. The following article is excerpted from my book, Fundraising for Social Change, Third Edition. (See page 15 for ordering information.)*

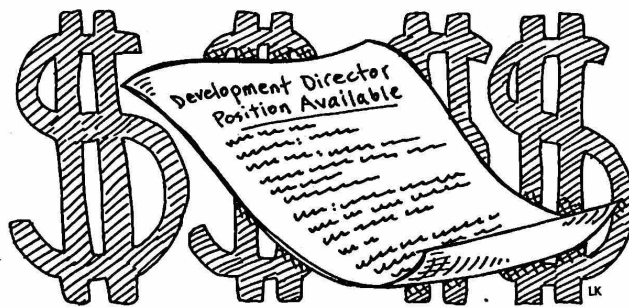
As small organizations grow, they grapple with the ongoing need to raise more and more money. Inevitably, they must consider hiring someone to take charge of the fundraising function. This is a difficult decision. A group is gambling that the investment of salary — money they often barely have — is going to generate much more money than they are currently raising. And it will, if the person is effective, the board already accepts its role in fundraising, and the organization has its basic infrastructure in place (up-to-date records, clear goals and objectives). However, there is little margin for error. What if the person isn't skilled enough, or isn't a good worker?

What if everything is in place, but the program takes longer than planned? How will the organization support itself in the meantime?

Three issues must be clarified before any decision to hire fundraising staff can be made.

**1. There must be clarity as to the role of a fundraiser or development director.** It is most important to understand that the person whose primary responsibility is overseeing fundraising does not actually raise money. With the input of the board or fundraising committee, she or he plans for fundraising (developing year-long plans that spell out each strategy and set goals).

This person maintains fundraising records and the mailing list; sends out thank-you notes, or oversees that task, if there is clerical staff; reports to foundations or large donors on specific projects; does prospect research; writes and sends mail appeals, renewals and other fundraising letters; and goes on major donor visits as needed. She or he works closely with the board, helping them make and then fulfill their fundraising commitments. This person may also write grants and research foundations and corpora-



tions, if that is a part of the organization's plan, and there may be other fundraising strategies that he or she must oversee or implement. The development director primarily works behind the scenes, establishing a structure for effective fundraising by volunteers.

Many board members and paid staff imagine that hiring a development director will save them from further fundraising tasks. "Let's pay someone to do this so we can do the real work" is a common and potentially fatal suggestion. While the paid fundraising staff obviously relieves the load of other staff and may relieve the board of some tasks, everyone's involvement in and consciousness of fundraising must stay the same or increase for the expanded fundraising program to be successful.

**2. There must be clarity about what you want this person to do for your organization.** Many people wonder why the task of fundraising has so many different job titles attached to it, such as "fundraiser," "fundraising coordinator," "development director," or "resource developer." In many social change organizations, the fundraising coordinator is called just that, in a straightforward way. In other, usually larger organizations, this position is called the director of development. Sometimes small groups think this title is a sign of elitism or an attempt to disguise the crassness of raising money, similar to saying "your support" rather than "your money" in fundraising appeals and letters. However, there are actually important differences between fundraising and development.

Fundraising is the process of bringing in the amount of money an organization needs to carry out its programs from year to year. Besides raising an operating budget, development also includes most of the following activities:

- Creating a long-range plan and updating it on a yearly basis (augmenting the case statement)
- Instituting a planned public relations program
- Maintaining a planned and frequently evaluated process for bringing on new board members

- Providing fundraising training for board, staff and volunteers
- Carrying out ongoing planning and evaluation of the financial needs and fundraising plans for the future of the organization
- Developing the group's capability to conduct capital campaigns and start planned giving programs.

One development director characterized it this way, "In fundraising, you make do with what you have. You keep the organization going and out of debt. In development, you start with what you have and you help it grow."

**3. It must be clear that hiring a development director will actually solve the problems you have.** Analysis of your situation will show whether your problems lie in fundraising or need other solutions. To begin this analysis, answer the following questions:

- a) Is your board active in fundraising? Does every board member participate in fundraising in some way, whether organizing special events, getting mail appeals out, or asking for money face to face?
- b) Does it sometimes seem that board and perhaps staff spend more time planning for fundraising than actually raising money?
- c) Do board members and other volunteers involved in fundraising seem to suffer from a lack of knowledge of what to do rather than a lack of enthusiasm?
- d) Is the executive director or other staff constantly pulled away from program development and organizing to do fundraising? Does she or he feel torn about setting priorities for use of time?
- e) Is your budget over \$200,000, or do you need to raise more than \$100,000 from non-government, non-foundation sources?

If the answer is yes to three or more of these questions, you should seriously consider hiring a development director. This person would direct and kindle the fundraising energies of the board, plan for fundraising, train others in fundraising tasks, and enable program staff to get on with program work.

If, however, you need help with data entry, writing the annual report, compiling financial reports, answering the phone, dealing with the mail, handling checks, sending thank-you notes, etc., you should consider hiring support staff, such as a secretary or office manager.

If your list of needs includes a better and more involved board, you need to strengthen your board and provide some motivational training for them before you hire a development director.

If you want someone to help you plan and carry out a time-limited project, such as a direct mail or major gifts campaign, consider hiring a consultant.

## *Paying Development Directors*

Imagine this scenario: An organization is debating whether to hire a development director. They have little front money so they worry about finding the right person and meeting a salary. As if in answer to a prayer, a handsome stranger shows up and offers to raise \$150,000 (their budget) for a 20 percent commission. If he doesn't succeed, he explains, they are not out anything; however, they pay him 20 percent of any money he raises. He says he can do it in six months.

There are several reasons that this is an absolute no-no. First, no one else in the organization is paid on commission. People are paid a salary in recognition that their work is a process and that they may be very good at their job without showing a lot of immediate progress in ending racism or stopping pollution, or whatever the group is working on.

Second, a commission tends to distort salaries. In this case, this fundraiser would be paid the equivalent of \$60,000 a year, nearly twice as much as the director, who makes \$35,000.

Third, this person will not bring his own list of contacts. He will be working with the organization's donors. He says he has some contacts from previous jobs, but are they appropriate for your work? And do you want him taking your donor information to his next job? Further, his whole livelihood depends on donors saying yes to his requests. Even a totally honest fundraiser working under these conditions would be tempted to distort information, seeing his rent check in the eyes of each prospect. Also, many big gifts take cultivation and several visits. He may be willing to settle for a small gift in order to get it quickly rather than take the time it would require for proper cultivation.

Fourth, what will the donors think if and when they find out that 20 percent of their gift went to this temporary staff person? Few things make donors angrier than learning that a significant part of their designated gift was used for expenses.

Fifth, as was stressed earlier, one person should not be in charge of actually raising money for an entire campaign. Suppose he is both honest and successful. When he leaves, the group is \$150,000 richer, to be sure, but no wiser in regard to fundraising.

Finally, the person coordinating the fundraising should absolutely believe in the cause and be a part of the team of people putting the campaign together.

For these reasons, paying on commission is highly frowned on in fundraising and all the trade associations for fundraisers, including the National Society of Fundraising Executives, the National Association of Hospital Developers, and the Council for the Advancement and Support of Education, have issued statements decrying the practice of commission-based fundraising.



Some people in small organizations will say, "That's fine for them to say, but we don't have the cash to hire someone and it is risky to hire a person when you can't afford it, both for the person and for us if they are not successful." But for all the reasons above, a small organization especially cannot afford the risk involved in hiring someone on commission.

The development director's salary should be based on other staff salaries. If you have a collective salary structure, then it is the same as everyone else's. If there are pay differentials, then it is less than the director's, but more than the office manager's. In a hierarchical structure, the development director is a management staff person, usually reporting directly to the executive director.

Many times you hear that you have to pay "a lot" to get a capable person. This is not true. A good person for your group is someone who first and foremost believes in your group and wants to be part of it. This person will express his or her belief through fundraising, just as someone else is expressing their belief by doing direct service, organizing,

or policy development. If someone who meets the criteria of believing strongly in your work has fundraising skills but can't afford to work at the salary level you are offering, you may need to reevaluate everyone's salary.

### ***How to Find a Capable Development Director***

Once you have decided that you need a development director, you need to create a fair and accurate job description and begin the hiring process. Many job descriptions fail to attract candidates because they contain too many responsibilities. Avoid the temptation to add components to the job that are not related to fundraising or public relations. It is fair to ask the development director to edit and oversee the publication of the newsletter; it is unwise to ask that person to also be the accountant.

You should be able to describe the job in one page (see example). Think about what skills are essential as opposed to those that are desirable but not imperative. When inter-

## **SAMPLE JOB DESCRIPTION**

**Position Available: DEVELOPMENT DIRECTOR**

**Starting Date: JUNE 1**

**Deadline for Resumes: APRIL 1**

**Harry and Jane's House** serves the homeless population of the four counties of eastern Rhode Island. Formed in 1983 after itinerant day laborers Harry and Jane Smith were found frozen to death on the steps of the Methodist Church, Harry and Jane's has sheltered 400 people every year. In addition to shelter, we provide job counselling, access to medical care and a school program for children. The total budget of the shelter is \$400,000, with \$200,000 provided by city and state funding.

Harry and Jane's House seeks its first development director to help ensure stable funding and to expand the range of services it provides.

**Major Responsibilities:** The Development Director will be responsible for expanding the shelter's development program which currently includes income raised through major gifts, direct mail, special events and foundation grants in addition to the government funding named above. Under the supervision of the Executive Director and in partnership with the rest of the staff, the Development Director will expand the shelter's fundraising program in the following areas:

1. Seeking major gift donations in the \$100 - 5,000 range
2. Expanding the direct mail program
3. Expanding the board of directors' role in fundraising, particularly in soliciting new and upgraded gifts.

The chosen candidate will also take primary responsibility for written materials, special events, and foundation proposals.

Prospect research and identification will be a shared responsibility with the Executive Director and fundraising committee of the board.

**Qualifications:** The successful applicant should have at least three years of direct service experience as a volunteer or paid staff, preferably in the areas of housing and homelessness, as well as at least three years of fundraising experience, including major gift planning and solicitation, good writing and communication skills, and experience working with boards of directors.

The successful applicant will have demonstrated ability to work well with a diverse constituency, will be self-motivated, work well under pressure and be able to handle several projects at one time.

It is highly desirable for candidates to be computer literate and to be familiar with Rhode Island.

Ideally, the candidate will have previous experience working in a shelter for the homeless.

Salary and benefits are commensurate with experience and existing pay and benefits at the shelter.

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viewing, ask for writing samples, since writing will be a large part of almost any fundraiser's job.

Advertise in publications geared to nonprofits. Unless you are in a small town, avoid advertising in the newspaper. (You will receive a lot of resumes of unqualified people.) Post your job description at the Foundation Center Collection nearest to you and in places where social change activists hang out or shop, such as coffeehouses, alternative or women's bookstores, health food stores, progressive churches and synagogues. Send the announcement to other nonprofits and call directors and development directors that you know and tell them the job is available.

Don't be stuck on hiring someone with all the "right" qualifications and experience. If you find such a person, hire them immediately. But if you don't find such a person, look for other sorts of qualifications that are evidence of skills related to fundraising, such as running a small business, teaching, or personnel management. Any job that requires that a person be a self-starter and have experience

planning, working with diverse groups of people, and good organizational skills is a good background for fundraising.

Look closely at volunteer experience, and encourage applicants to describe their work as volunteers. Many people know more than they realize about fundraising from having volunteered. People with little or no volunteer experience are not good candidates because they will have little idea of how to work with volunteers.

In addition to broadening your criteria in hiring someone, be willing to hire a consultant for a few days to help your new staff person get a running start on their job, or send the new development director to one or two of the many classes and courses that are offered on fundraising. The theories and how-tos of fundraising are not particularly difficult to understand, even though they take a lot of work to implement. Getting someone who is underqualified but bright, committed and eager to do a good job is almost as good as getting an experienced person with the same attributes. **CFB**

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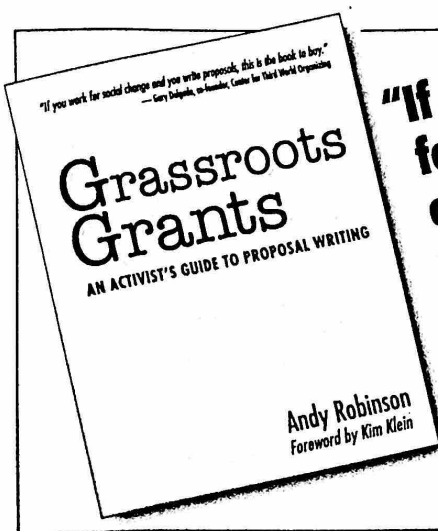


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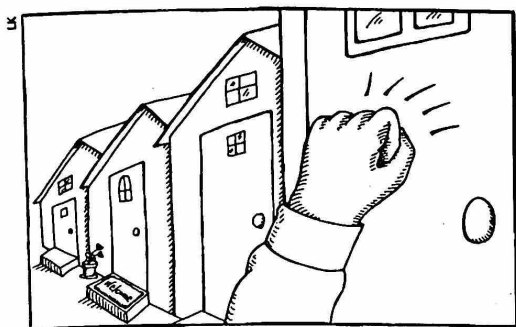
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# Everything I Know About Fundraising

## *I Learned Knocking on Doors*

by Andy Robinson

In 1980, a few weeks after Ronald Reagan was elected President, I answered a classified advertisement in the Portland Oregonian. The first word was ACTIVIST. I can't remember the rest of the ad, but the main idea was that I would get paid to work for social justice. I was adrift and anxious about the future, and this seemed to me a small, tangible miracle.

The next day I was sitting on a cracked vinyl sofa, waiting for my interview. The linoleum was streaked with dirt and a pile of dead office machines (remember mimeographs?) rusted quietly in the corner, but the atmosphere was electric. Phones rang, people ran in and out with picket signs, a typewriter (remember typewriters?) chattered in the back room, and I overheard an argument in which the word "tactics" played a big role. I didn't know what was going on, but I wanted in.

That night I started knocking on doors, asking strangers for money to fight the utility company. I was — surprise! — a fundraiser. By the time I left Oregon Fair Share in 1983, I had canvassed thousands of homes and given my pitch ten thousand times. I received lots of training in community organizing and tactical research, but my door-to-door experience — talking with people about a better world and asking them to help pay for it — was the most compelling, frustrating, and empowering part of the job.

Almost every day, I am reminded of lessons learned while canvassing. As you go forward with your fundraising program — writing grant proposals, designing direct mail appeals, meeting with major donors, and so on — keep these points in mind.

**1. Don't waste your time on lost causes.** Our crew leaders had a favorite expression: "Canvass with your feet, not your mouth." Rather than waste time talking with marginal prospects, I was encouraged to make a quick

evaluation, offer a polite "Thanks for your time," and move on to the next house.

All successful fundraising is based on targeting. Spend the most time, effort and money on your best prospects.

**2. You want a dialogue, not a monologue.** Our canvass "raps" included periodic questions: "Are you concerned about these issues? What have you heard about our work? How would you like to be involved?" If the prospect responded with a blank stare or an unenthusiastic answer, it was time head for the next door.

This lesson has important implications for all face-to-face fundraising, especially asking for major gifts. Many novice solicitors are so focused on the needs of the organization, they forget about the needs and interests of the donor. To be an effective fundraiser, you must be a good listener.

**3. Craft the pitch to meet the needs of the individual.** I always mentioned two or three current issues to see which, if any, touched a live wire. If I got a bigger response on utility rates than community reinvestment ("Am I concerned about utility rates? Look at this," he said, displaying shut-off notices from the electric, gas, and water companies), then I talked about our efforts to reform the public utilities commission.

If you don't identify and promote the right "product" for each individual, you won't get the sale (donation).

**4. Tell the truth.** It's hard work finding the right people, figuring out what each one specifically wants, and providing it. You might get frustrated. And when you're frustrated, it's easy to stretch the truth by embellishing your organization's track record or promising extra benefits to the prospective donor.

After knocking on 40 doors — an average night's work — I was often tempted to say the first thing that came into my head. To edit myself, I tried to remember that someone

— maybe me — would be knocking on that same door in a year. We had to be accountable to that particular individual.

When you stretch the truth, it has a way of wrapping itself around your neck. Never promise more than you can deliver.

**5. The stronger the relationship, the larger the gift.** As the old cliché goes, "People give money to people, not organizations." My favorite canvassing moments came while visiting members I had signed up during a previous circuit through the neighborhood. These people often remembered my name, invited me in, wined me, dined me, and renewed their membership at a higher rate.

This is the power of fundraising: people give you their money freely, then thank you for doing good things with it. Their trust is strengthened as they get to know you, and your organization, on a personal basis.

**6. Hermits need not apply.** I trained a few well-meaning folks who had the right politics for the job, but were basically loners. They lasted a few days, then quit. No surprise — canvassing, like all fundraising, is about people.

If you don't like people, fundraising is the wrong line of work. However, if you genuinely enjoy other human beings,

you've passed the first and most important test of a successful fundraiser.

*Andy Robinson is a trainer and consultant in Tucson, Arizona. His book, Grassroots Grants: An Activist's Guide to Proposal Writing, is available from Chardon Press (see page 15). This article first appeared in Shelterforce. G3*

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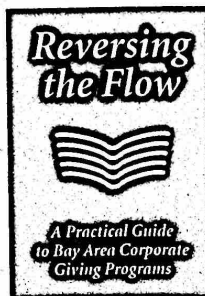


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# Profile of a Major Donor: *2000 Club*

by Carmen Chan

**Editor's note:** A few years ago, the Boston Women's Fund launched an endowment campaign called "The 2000 Club." The Boston Women's Fund is a public foundation that improves women's lives by supporting grassroots women's groups working for social and economic justice in the greater Boston area. Through this campaign, the Fund is seeking 2000 contributors, each of whom will pledge \$100 a year for five years, in order to raise a total of \$1,000,000 by the year 2000. The following profile of one of their donors was submitted by Carmen Chan, development director at the fund.

An interesting note is my own role in the 2000 Club. When the idea was first proposed to me, I thought it was one of the more ridiculous fundraising schemes I had heard of. "What's wrong with a regular donor pyramid," I thought, "where you seek a number of donors at different giving levels — few at the top and many at the bottom — to reach your goal." I was sure the idea would fade away for lack of oxygen, and it did begin to lose energy after a short while.

However, a new executive director, Jean Entine, who is also a friend and colleague of mine, brought the idea back to life. When she asked my opinion of it I reiterated how silly I thought it was.

"You'll never get that many people to give in that way," I commented confidently. Nevertheless, she thought it was important for a lot of people to feel ownership in the Boston Women's Fund, and I agreed with her, but I felt there were other ways to do that. I thought the campaign defied traditional experience, which dictates that people will give at a level that is comfortable for them, not a preset amount determined for all. I felt there was no point in trying to pioneer something so different from the tried-and-true methods for raising \$1,000,000.

Well, I was wrong. The Boston Women's Fund is on schedule with this part of their endowment campaign. They already have more donors to the 2000 Fund than I thought they would ever get and I am now confident they will reach their goal.

I don't feel bad about being wrong, because the Fund followed two other pieces of advice I often give. First, don't get too tied to tradition. If we did everything traditionally, there wouldn't be such a thing as a women's fund. And second, if you don't like the advice of a consultant, disregard it. If you are right, you can become a consultant yourself.

—Kim Klein

**P**aula Virtue, 2000 Club member number 16, signed on to the 2000 Club in May 1991. For the past five and one-half years, Paula has been sending us a \$10 check every month religiously. No reminders were ever sent to her. (*Editor's note: That's against my advice also.*) Paula has now completed her pledge of \$500.

When asked about her unique approach to meeting her 2000 Club pledge, Paula said, "I learned it from my mother." Growing up in a working-class family of five in the Midwest, Paula recalled her mother gave often to charities, a little bit at a time. When Paula decided to join the 2000 Club she told us, "I know I can't give a big chunk of money, so I give in smaller increments."

A 48-year-old foster parent of two children, Paula's annual income is \$28,000. In addition to the Boston Women's Fund, she makes annual donations to a few other nonprofit organizations. "I joined the 2000 Club because I believe in what the Fund does. I know there are a lot of worthwhile projects in Boston doing good work that isn't being done by others. The Fund supports those groups. It helps when you are small and young."

Paula first learned of the Boston Women's Fund about seven years ago when the organization she worked with, the

East Boston Ecumenical Community Council, received a grant from the Fund for an ESL program for pregnant Latinas. Paula is an ESL coordinator at the Council, which provides a range of services to the East Boston community, including immigrant advocacy, tenants' rights, and family and youth counseling. Before coming to Boston, Paula had been a teacher in Chicago for seven years and had lived in Latin America for 10 years. Over the years, Paula has dedicated herself to various aspects of education, immigrant advocacy and women's issues.

With three years left for the Fund to reach its goal of 2000 donors, Paula has begun fulfilling a second pledge to the 2000 Club and speaks to those who have not joined: "Boston Women's Fund is doing very important work that deserves to be supported. If you can't give \$100 a year all at once, think about giving in smaller increments. It's possible. Think about it the next time you go out for pizza."

Certainly her advice is relevant to anyone wishing to make a significant gift to an organization they believe in. **GFJ**

*For more information about the 2000 Club, contact the Boston Women's Fund, 14 Beacon Street, Boston, MA 02108 or call (617) 725-0035.*

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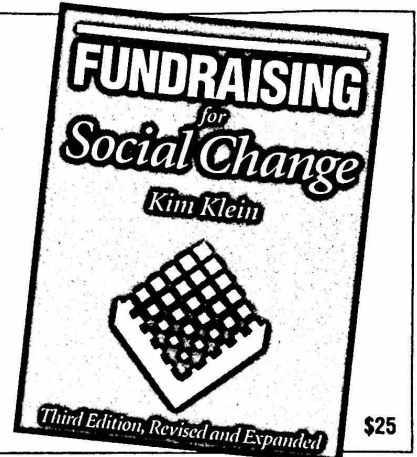
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