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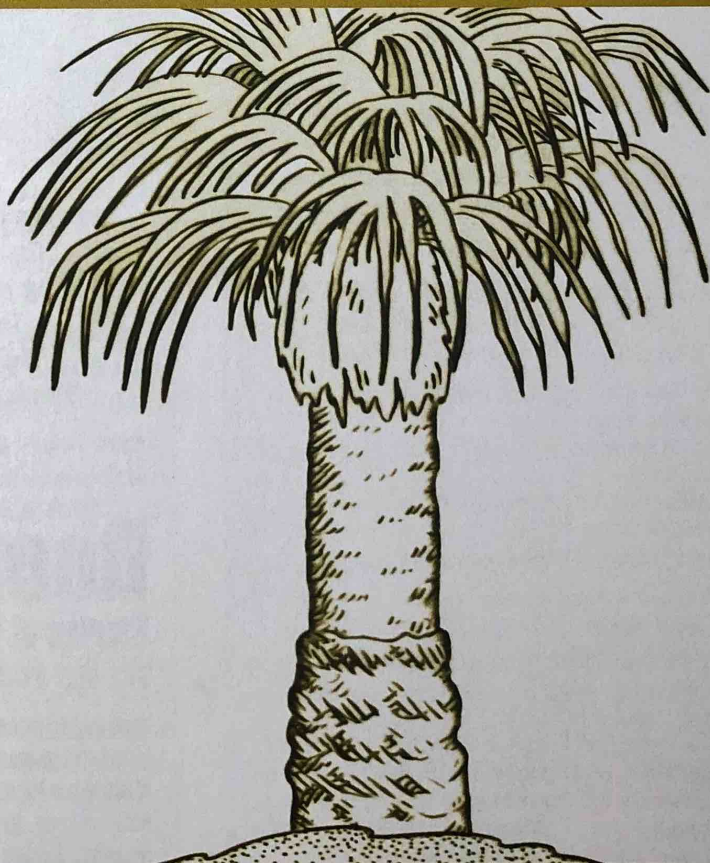
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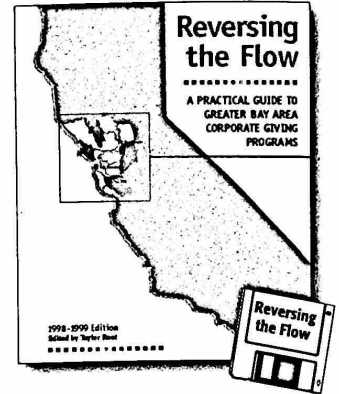
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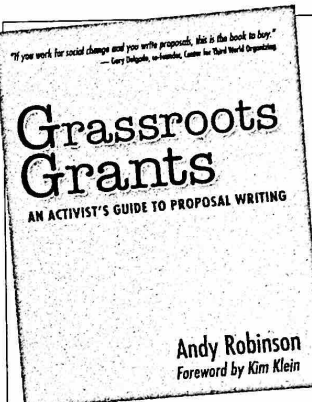
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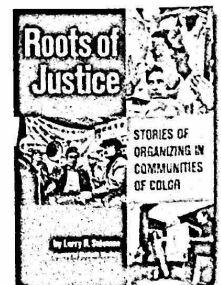
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Roots of Justice

Stories of Organizing in Communities of Color

BY LARRY SALOMON

Roots of Justice recaptures some of the nearly forgotten histories of communities of color. These are the stories of people who fought back against exploitation and injustice — and won. *Roots of Justice* shows how, through organizing, ordinary people have made extraordinary contributions to change society.



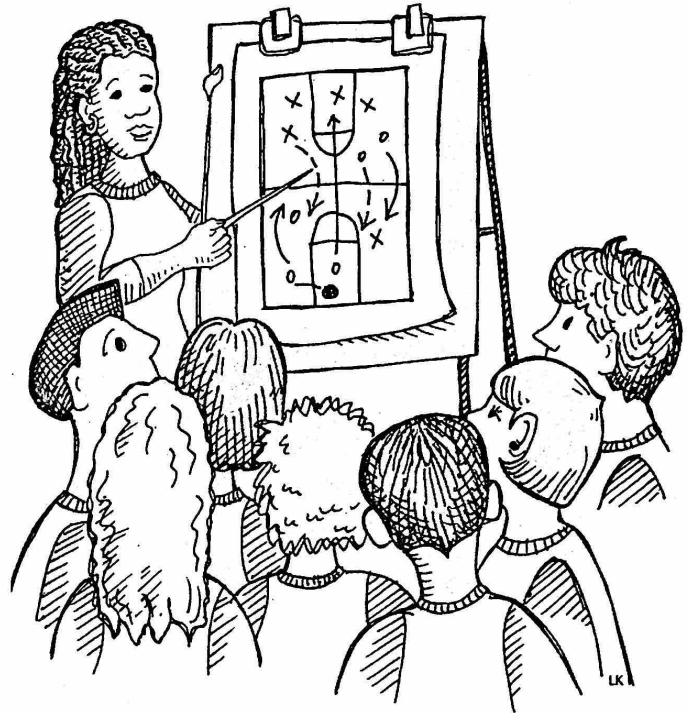
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PLANNING TO PLAN:

Demystifying Strategic Planning

by Cate Gable



In truth, most good plans come from the gut, depending on analysis only to uncover basic flaws and underlying external threats and to document what instinct already knows.

—C. Davis Fogg, *Team-based Strategic Planning: A Complete Guide to Structuring, Facilitating and Implementing the Process* (American Management Association, New York, 1994).

An Overview

There is nothing magical or mysterious about strategic planning. You don't need an MBA from Harvard to begin a strategic planning project. Humans are natural planners—planning is an activity that most of us use in our daily lives without even thinking about it.

In this article we will outline an overall planning methodology that can be used in any type of organization or applied to any kind of planning project. And, in order to build a working vocabulary for you and your organization's planning team, we'll provide some commonsense definitions for "strategy," "goal," "action," and "monitoring"—the basic components of planned change.

What Is Planning?

When you have errands to accomplish in one afternoon, you plan an approach for getting them done based on a logic that you create. Maybe it has to do with location or sequence. Maybe it has to do with other scheduled commitments you have. Or maybe it simply has to do with your own likes and dislikes: you do your favorite tasks first and save the aggravating ones for last. But whatever method you use, you are either successful in accomplishing your tasks or fall short of completing them based on the internal plan-

ning methodology that you have created.

The process of planning in the nonprofit (or corporate) workplace involves more or less the same steps as completing your list of errands. The nuances, the vocabulary, the level of complexity and the specific planning tasks may be different, but the process is the same. "Planning" could be defined as creating a process that allows a group of people to take action that will result in an outcome that would otherwise not have come about.

Planning to Plan

If you are working on a planning project by yourself, you simply need to outline your method and lay out your planning logic: how will you take action that influences the future?

But, more than likely, you will be working on this planning project with others, who will be either decision makers in outlining the broad goals of the project or those who will carry out the activities that have been planned.

When there is a team involved in planning, it is essential that everyone on the team understand what the planning process will be. We have termed that "planning to plan." In other words, your team must begin by outlining and agreeing to exactly what you will be doing together and how you will do it.

The planning methodology that I have developed in my years of strategic consulting is captured in the acronym CGSM™—it not only stands for Cate Gable's Strategic Method, it also refers to the actual steps of the planning process:

- Challenge
- Goal
- Strategic Action
- Monitoring

The boxed diagram on the next page gives more detail and outlines key questions for each of these four steps.

Let's explore each of these four planning steps separately.

The Challenge

The challenge is the *why* of your planning process in that it is the reason you are planning at all: Something needs to be changed and that becomes the catalyst for your action. Many times members of a planning team can't even clearly describe or agree on what they are changing. Big problem! Your planning team should always start by trying to answer the question, "What needs fixing?"

In a nonprofit setting, answers to this question might look something like this:

- We need a broader base of funders to keep our organization alive.
- The People with AIDS Coalition would like to send two delegates to the International AIDS Research Convention in Barcelona. How can we raise the money to do that?
- Our efforts to raise awareness about the loss of ecological diversity don't seem to be working.
- We are not attracting the quality of leadership we need in our board of directors.

Any of these statements could be starting points for a brainstorming session on "What needs fixing?" But don't jump to conclusions. Maybe the real problem is hidden from view. Maybe you don't only need a broader base of funding; maybe the problem is that you aren't leveraging properly the funders you currently have. Maybe it's not that you don't have qualified board members but rather that they aren't well-enough informed about your organization's goals.

Identifying the challenge is actually a situational analysis—which is only a fancy term for gathering information in order to understand the real source of the problem.

Let's say you feel your organization is not attracting the quality of leadership you need in your board of directors. OK. But what is the quality of leadership you need? Are you sure? What are the qualities of your effective board members? How did you find them? Do you need better orientation about your organization for board members? Are the goals of your organization appropriate? Maybe your board members aren't committed enough to your goals. Do you have so many board members that they can't be effective or

don't feel personally responsible to your organization?

In this first step, let the guiding question provoke an exploration of the real problem.

Sometimes challenges exist in bundles or systems: one problem may be either the cause or the result of another problem. Identifying your group's real challenge is the beginning point for any planning process.

The Goal

If the challenge is the *why*, then the goal is the *what* in your planning project. It is the pole to jump and clear, the baton to grab for, or the tape to break. In this second step, goals and objectives are the same things. They might simply be called results—in other words, what your organization wants to accomplish.

Clear, effective goals have two characteristics: they are measurable, and they are directly derived from the challenges you and your team have outlined.

A goal must be quantifiable. If you want to increase your funding base, how will you measure that? Will you increase the overall number of active donors in a year or in a particular drive? Will you increase the amount of money each donor gives? Will you increase the number by 200 or by 10% of last year's group? What if you increase your funders by 10% over last year but you also lose 15% of your active donors? Will you feel that you have reached your goal?

Or, to use a more difficult case, how will you measure the effectiveness of your board? By the number of projects each board member participates in? By the amount of money each one individually generates? By the amount of positive publicity each is responsible for? By the number of high-level contacts each solicits in the business world?

Be clear and communicate to everyone in your organization what your goal is and how it will be measured. Your planning project will have no hope of succeeding if your goals are not measurable and visible to all.

And, if your goals are not exactly on target against what needs fixing, you will be wasting precious time and energy. If your primary goal is increasing your funding base, don't throw in extra goals that have to do with making your office more efficient. Focus on exactly what you want to change *now!* During the next planning cycle, you can add another worthy goal if you like.

If your goals are accurately derived from your challenges, not only will they assist you and your team in making wise decisions about how to use your resources—whether monetary or personal—they will also give you information about the effectiveness of your actions.

Strategic Action

The strategic action step is the *how* of your project planning. Now you know what you need to accomplish, but

how will you do it. What actions will be taken?

The word "strategy" has been borrowed from the military; in fact, the etymological root of strategy is the Greek word "strategos" meaning a general, or someone who commands a "stratos" or army.

A strategy is something that drives or governs a set of actions intended to accomplish a specific purpose. Deciding which actions are the best ones will depend on the parameters of your project, the circumstances and details of your environment, and the abilities of and resources available to your team.

But strategy exists in the world of ether, in ephemeral grey matter. A strategy is a thought or a plan for action, but a plan only. It has no effect in the world until it is implemented. That's where action comes in.

Action is of this physical world—it involves the direct manipulation of the world and its objects. Thus, the action you take is the skillful implementation of an appropriate strategy. So, in our planning process, action is the embodiment of strategy: it is the doing, the movement, the physical energy that one lets loose in, and that operates on, the world. That's why in the steps of our planning process I don't separate strategy from action—they are combined into one powerful dynamic: strategic action.

Let's suppose that your organization has identified as a challenge to increase the involvement of board members. After brainstorming based on your goals, an unsorted list of strategic actions might look something like this:

THE CGSM,[™] FOUR-STEP PLANNING PROCESS

The key element in each of the four steps is in bold type. What this step is sometimes called in a more formal corporate planning process appears in parentheses. The key question helps to explain what must be accomplished in each step.

Step 1: **Identify Challenges** (Situational Analysis)

KEY QUESTIONS: Why are we planning? or What needs changing?

Step 2: **Set Preliminary Goals** (Objectives)

KEY QUESTIONS: What do we hope to achieve?

Step 3: **Devise Strategic Action** (Strategy)

KEY QUESTIONS: How will we do it?

Step 4: **Create Effective Monitoring** (Control)

KEY QUESTIONS: What will we measure? Who will do it? When will it be done?

THE CYCLE BEGINS AGAIN:

Step 5 or Step 1: **Result or/Identify Challenges** (Situational Analysis)

KEY QUESTIONS: Were we successful? And/or What needs changing?

- Create a survey to query current board members on their understanding of our goals for 2000.
- Develop a self-evaluation survey for current board members.
- Review board selection policy, board orientation procedures, and terms of service.
- Survey by phone similar organizations in our area to determine how their boards are organized, number of board members, level of involvement, etc.
- Reorganize our next fund drive to include project teams, with one board member per team.
- Schedule our executive director for informal meetings with each board member to discuss how to improve our working partnership.

As is true for every step of your planning project, the raw material of brainstorming sessions will need to be sorted, organized, and selected from. Not all of these actions will be appropriate or doable. Your team will need to decide which actions to pursue and how to sequence them.

And just as a boxer's punch needs to be timed right, aimed right, and delivered with the right amount of force—your actions will have many variables that can be tinkered with in order to keep them "on target."

Devising strategic action is a way to optimize cooperative efforts to produce selected results.

Monitoring

Creating monitoring tools, also called "control" in some processes, is the last step in the successful completion of your team's planning project. Monitoring provides the transition from the intellectual nature of planning to the real world where your plan is being executed. When you measure the actual effects of your actions at regular intervals, you will know whether or not you are making progress toward your goals.

The monitoring process seeks to find out if your actions are on target. Monitoring and measurement devices generally ask questions about *who*, *what* and *when*:

- What kinds of measurements will be tracked?
- When will the measurements be taken? How often?
- When will the measurements be reported? How often? To whom?
- Who will do the tracking, computation, analysis, and reporting?
- Who will be responsible for what tasks?
- Who is accountable if tasks aren't completed?

It is only by having concrete benchmarks that you will know if your strategic actions need to be adjusted mid-course. Maybe the goal itself will prove to have been too easy, unrealistic, or even irrelevant.

Trying to execute a plan without actually monitoring your progress is like trying to find your way to the door in a

room that is empty and dark. You need to have feedback about how you are doing, where you are in relationship to where you want to be, and whether your steps are leading you in the right direction.

Often the last task in the monitoring step is to decide, "Did we successfully reach our goals?" or "Are there other things we need to accomplish now?"

This evaluation can be the end of a successful project or the beginning of a new cycle of identifying challenges.

Summary

Remember that although these steps appear as discrete items here, describing them separately only serves to simplify our understanding of the planning process. In the real world, these "steps" overlap and blur into one another; each step emerges naturally from the one before it and leads into the one following.

This planning process may help you to get started on your project for change. Or you may devise or adapt another process that better meets the needs of your organization and circumstances. The main thing to keep in mind is that there is no magic formula for planning. Clear communication with members of your planning team, simple rules for your interactions, and easily understood planning steps are the essential elements in a successful planning process.

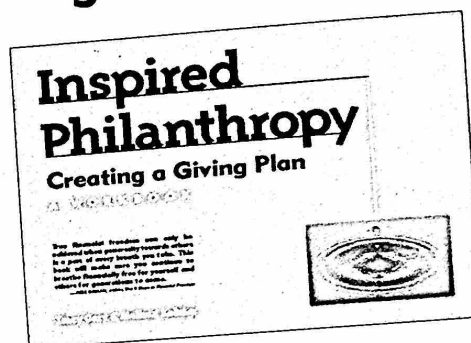
Every planning project has different requirements, a unique pool of talent, and particular constraints and opportunities. Use your common sense and good judgment in deciding how to approach your project, and be ready to change your mind or your direction if things don't feel right or don't seem to be working.

In the San Francisco Bay Area, we build with wood because a brick wall cracks when the earth shakes. Bottom line?... Be ready for an adventure when you begin your planning project. Be flexible. **[F3]**

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Cate Gable is a strategic marketing consultant specializing in electronic commerce and the author of Strategic Action Planning NOW! A Guide to Setting and Meeting Your Goals (St. Lucie Press, 1999; order toll-free at (877) 644-0195). She can be reached at (510) 644-0193 or <www.axioun.com>.

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Cultivation:

What It Is, and What It Is Not

by Kim Klein

In a number of my recent fundraising workshops, I have asked participants to give me a definition of cultivation. Here are the five worst and five best descriptions people have offered.

Worst

1. Cultivation is where you act like you like the donor, whether you do or not, so they will give you more money.

2. Cultivation is like gardening—you feed the donor a lot of manure, water with flattery and pick the fruit as soon as you can.

3. Cultivation is like going on a date. You want to have sex, and your job is to get the other person to want it too.

4. Cultivation is where you go and visit a rich person three or four times without talking about money, and then you finally bring it up. I don't know how you get to the money part though, or what you talk about on those other visits.

5. Cultivation is a nice word for the games you play with donors, where you try to win a lot of money and they try to give you less than you want.

Best

1. Cultivation means you treat the donor like a whole person, instead of just a checkbook.

2. Cultivation is where you get to know your donors to find out things you have in common, especially what you each most like about the organization, so you can talk about something besides money when you see them.

3. Cultivation is what I tell myself I am doing when I am actually procrastinating about asking for the gift.

4. Cultivation is what you have to do to get the donor to trust your organization, so he or she will give you a really big gift.

5. Cultivation refers to the things you send your donors, especially more personal things, like birthday cards.

I had been in fundraising for more than 10 years before I started to understand what cultivation was. I would hear the word at conferences and read it in articles, especially in relation to big gifts. "She gave \$10 million, but of course,

that gift was cultivated over many years." Or, "They left their entire estate to our institution because we had been cultivating them for a decade or more."

The tone of these comments seemed predatory rather than simply descriptive, and I was put off by them. In the meantime, I was asking for—and sometimes getting—gifts of \$100, \$500, and \$1,000 and teaching other people how to do what I was doing. Since I was able to raise money, I didn't spend a lot of time thinking about cultivation one way or the other.

Understanding Cultivation

Although my understanding of what cultivation meant didn't come to me in a big revelation, two incidents stand out in my mind as helping me to clarify what cultivation is.

The first incident occurred when a long-time donor to a group I was working for told me she appreciated how I and the other members of the development committee cultivated her. I didn't tell her this, but I was not aware that we were cultivating her, and had never thought of her or any of our donors in those terms. When I asked her what she meant, she said, "You often send me articles on topics you know I am interested in, you always add a personal note at the bottom of any form letter or invitation, and I was particularly touched that you remembered that my cat was having surgery and called to see how she was doing."

By her response, I could see that she was referring to my policy of personalizing as many pieces of correspondence with all our donors as I could and of keeping track of donor interests, so that I could send them information related to our group that spoke to their particular interest.

The second incident occurred at a workshop I was teaching with the late Hank Rosso, founder of the Fund Raising School. In an exercise during his session on "The Big Gift," he asked participants to tell him which of the following four activities fundraising was most like: seduction, hand-to-hand combat, sales, or stalking. To my surprise, most people in the class identified fundraising with seduction, and a few even chose stalking. Only a handful related

fundraising to sales. Fortunately, no one chose hand-to-hand combat.

Hank explained that seduction is not a bad thing in its place, but that its place is not in fundraising. "We don't want the donor to be swept away with passion, particularly if there is to be any regret later. We want a donor to make an informed choice to give—a choice he or she will continue to feel good about, and which will lead to another gift."

Stalking, of course, was ruled out not only because of the image of the donor as a victim, but because stalking implies that the donor would not willingly come near the organization, but must be hunted down and trapped into giving.

Sales was the correct analogy because there was a quality product—the work of the organization—to be sold to a customer seeking that product. The product merely had to be described in words that the customer could understand, with a price attached that the customer could pay. While the sales analogy has its shortcomings, it does place appropriate emphasis on the organization and its work, whereas all the other analogies focus solely on the donor.

Cultivation and Fundraising

So, what does cultivation mean in the context of fundraising? In the five best definitions above, the one that is the most accurate is the one that admits that, much of the time, cultivation is a code word for procrastination. "I can't ask for the money yet, because I haven't cultivated the donor enough." The definition that best summarizes cultivation is, "Cultivation is where you treat the donor like a whole person."

The analogy to sales is also critical here. You and the donor are in a partnership because of your organization. The staff, the people who give time—board members and other volunteers—and the people who give money (who ought to include but not be limited to the staff and volunteers) are all committed, to greater and lesser degrees, to the goals of the organization. People who donate money help to build the organization, and also the movement the organization may be a part of. Donors need to be seen as integral to the framework of the organization rather than a separate group to be dealt with separately from other constituencies.

So, cultivation is what you do to build the loyalty and commitment of the donors to the organization. Obviously, the more highly a person thinks of your group, the more they will be willing to do for your group. A person thinks highly of a group for one or both of two reasons: First, as the person understands the work of your group and sees it as successful, important and well planned, and perceives that you spend money (their money) wisely, they increase their respect and admiration for what you do. Second, as a person feels appreciated by your group, believes that their gift makes a difference, that they are noticed individually and cared about individually, they will also increase their

respect and admiration for what you do. Both of these perceptions of your group build loyalty, but the two combined build the most loyalty.

Let's look at what this actually means. Cultivation usually begins after a gift has been made. While you may read and hear many stories of donors who were "cultivated" for years before they finally gave millions of dollars, I think these are the fundraising equivalent of fishing tales. Grassroots organizations in particular do not have people like this whom we can "cultivate." We don't have buildings to name after people, academic positions to endow, or esoteric pieces of medical equipment or research projects to underwrite. Just as in sales, you want to attract new customers, but most of your energy should go into keeping customers you already have. Your greatest energy should go toward those customers who buy the most frequently, and who buy the most.

So, sort your donor list into three categories: frequency of giving, recency of giving, and size of gift. Your highest priority for cultivation will be people who are in all three categories: those who give large gifts often and who have given recently. The next-highest priority will be people who give large gifts frequently, even if their last gift is not very recent. Third priority will be people who give large gifts anytime, and last will be people who give frequently.

Cultivation Techniques

Every donor should receive a thank-you note for every gift, which is the minimum cultivation effort required. All donors may also receive a newsletter. Those donors who do more—either by size of gift or by frequency of giving—should be given a little more attention. How much more will depend on how much you know about them and how many of them you have.

Here are some possible cultivation techniques:

Receptions for donors

A group in New Mexico has successfully completed a campaign to have child care offered at the workplace of a local corporation. They have been working on this campaign for three years. They plan a celebratory reception where one of the main organizers will give a short talk, to which they will invite the following categories of donors: anyone who was a donor at the time the campaign started, all the donors who gave specifically to this campaign, and all current donors who give annual unrestricted gifts of \$250 or more. To the first group, they send a letter saying, "You may recall that we have been working on this issue since 1996. You were helping us then, and have continued to support us. Now help us celebrate."

To the donors who gave specifically to the child care campaign, the letter reads, "Your financial help has paid off, and thanks to you and all the people like you, we have won. Come celebrate with us." The major donors get a similar

invitation. Anyone who is a major donor, gave specifically to this campaign, and has been a donor at any level for three years or more also receives a follow-up phone call.

The reception venue holds about 50 people. The organization decorates the room with a timeline showing the progress of the campaign, highlighted by newspaper articles and pictures about the campaign, so people can relive the success. More than 60 people actually come to the celebration, and it gives the staff and board members a chance to meet other donors. There is no additional request for money—this is simply a time to say thank you and celebrate.

Sending articles and information

When donors send money in response to a specific appeal, or they tell you they are most interested in one particular issue, or you think that because of their job, other groups they are involved with or other information you have about them that they have particular interests in some aspects of your organization's work over others, make a note of that in their donor information file. As newspaper articles come out or reports are published, send copies of these to the donors who will be interested with a brief note saying, "Thought you might enjoy this." Or "As per our conversation, here is the report I told you about," or whatever happens to be appropriate.

Offer to visit

The most effective cultivation technique is meeting a donor in person. Mostly, these will be times when you want to ask for a larger gift, but every so often, you should meet with a donor in order to get advice, tell them about what is happening in your organization, or simply to drop off an Annual Report or a premium such as a mug or a T-shirt. These visits can last five minutes or an hour—just taking the time to show that you are interested in knowing more about the person will be effective.

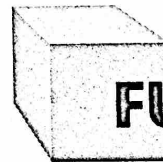
Things like birthday cards, congratulatory notes, get well cards, are not necessary. If you are the type of person who remembers things like that, then do them. If this is not

something you do for your own friends, then don't. Cultivation only works when there is a genuine desire to know the donor better. Many of us find that we become friends with some of our donors, so we treat them like friends. Those who are not friends we should consider to be colleagues—they share our values and they wish for the success of our organization's work.

If I were in charge of re-inventing all the words that would ever be used in the context of fundraising, I would never choose the word cultivation. I think it is a difficult word to truly humanize, and I still find that I don't use it very often. To me the word adds a sense of something that I, as a development director or board member, do *to* the donor in order to get the donor to do something for the organization. I prefer concepts like graciousness, hospitality, and sharing—the idea that we are all donors, and that we are all pulling together towards the same end—fulfilling the mission of the organization.

Some of us give a lot of money and some a little. Some of us give what is a lot to us, and some of us give what is a pittance to us. Some of us give time, advice, or products as well as money. The way that we will keep getting whatever gifts our donors give us is to keep doing good work and to keep appreciating those who make the work possible. **GFI**

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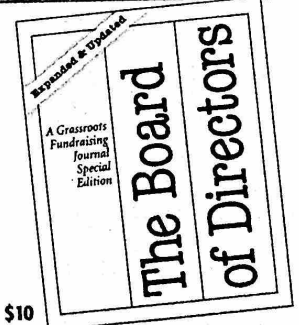
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The Executive Director & the Development Director:

Building the Team

by Maria Pilar Gonzales

Of all the relationships you will have with colleagues during your nonprofit work life as a development director, the most rewarding—and one of the most challenging—will be with the executive directors you work with. In an ideal fundraising world, we aspire to create a united front between the development director and the executive director that will give us financial and organizational success.

The executive director (E.D.) can become your best advocate and, more important, can be the best advocate for healthy fundraising at your organization. Your combined skills will educate board members, build trust in their responsibility for raising money, and endow the process with enthusiasm you'll need to draw on again and again.

First of all, let's consider the role of the executive director in development. The executive director plans the division of labor and hires the development director. The E.D. motivates and directs all fundraising activities that pertain to major gifts, in partnership with the development director. The E.D. meets with donors and asks for their financial support. The E.D. also leads cultivation strategies and media promotion, which helps create public support. Along with board members, the E.D. represents the most public face for fundraising. And, depending on the E.D.'s way of operating, you will want to be a full partner in the process for the best results.

Let's consider a couple of examples of how this relationship might not work as well as it should. On the unhealthiest end of the spectrum would perhaps be the expectation of development director as miracle worker and not as part of a team. In this situation, the development director is hired when all existing funding sources are exhausted or about to expire, and the E.D.'s pie chart of tasks is sliced up

enough to feed a party of 100. Unfortunately, the development director is now under tremendous pressure to balance all the donor relationships the E.D. struggled with, or was unable to get to, and the ones the board members let drop. As a new staff person, the development director can't possibly bring in singlehandedly the kind of money that all these people working together would be able to do—and particularly not in a short time frame.

I remember one E.D. saying to me, "Thank God we have you now. I have no time to talk to donors, and this will free me up to do other things. Now I can get my work done." Tactfully, I worked with this E.D. over several years to help her reclaim her role in fundraising.

In that organization, the E.D. had a significant peer group who were supporters—judges, lawyers, and social workers. As I clarified the division of labor through our active partnership in fundraising, we succeeded together. I coached her through donor cultivation, prepared packets of materials for her visits and arranged luncheons with donors. She became more responsive to donors and more effective in raising money through our team partnership.

Another example of a relationship lacking team spirit is development director as party planner. Hire a development officer and those shindigs will take care of your resource problems. They will make loads of money, and the E.D. will never have to ask another donor for support.

I really did meet an E.D. who asked if they could just hold a couple of gala events a year and not bother with donors. This E.D.'s organization was making the transition from depleting government grant support to developing individual donor support. Although his organization understood the idea of diversifying their support base, he

had not had any training in the fundamentals of development. I advised him to get the training first in order to hire the right development staff.

If you are considering a development job...

These are only two of many stories where a director-to-director team could have made a difference. There are several ways I recommend you might avoid disasters up ahead. If you're interviewing for a development position, ask some or all of the following questions up front, and know what's acceptable to you in the way of answers *before* the interview:

- Does the E.D. embrace the practice of fundraising as a team effort?
- Do they take all the credit for raising the money for their organization?
- Do they talk about working with board members on fundraising?
- What do they do to rebuild staff energy or focus after a campaign?
- Can you imagine coaching your prospective employer in a donor cultivation?
- How do they measure success in donor solicitation?
- Do they understand they cannot control the process of people giving money?

After you take the job...

Regardless of how ideal the prospective relationship seemed before you were hired, every relationship can benefit from some attention. Here are a few ways to strengthen a working relationship with the E.D., or to re-energize an already good one.

1. Set realistic fundraising goals with your team. Do the human hours needed to reach your fundraising goals match the real possibilities? Does your E.D. realize what an integral part of the fundraising team they are, both as a solicitor and for motivating other staff? Work with your E.D. to help create a solid team.

2. Build a relationship. Invite your E.D. out for a meal or coffee and pick up the tab, or at least, be prepared to offer. This is an investment of building collegial friendship worth \$20 and an hour of your time! Use the time to get to know each other a little better, and bring your ideas to the table, not your complaints—unless this time was set aside to be a true workload review.

3. Develop an understanding about communications style. Find out early on in your working relationship how your E.D. best receives information, and let them know yours. Do they like e-mail? Formal memos? Reports? Face-to-face meetings in the hall? Each of you knowing optimum ways of communicating with one another will greatly reduce

your frustration and create a level of parity and respect. The first time an E.D. asked me my preferred styles of communicating I felt tremendously respected. It started a strong, long-lasting partnership that made for great success in our goals for the organization.

4. Be compassionate. Whether it's about time schedules or remembering donors' names, or whatever the point of tension, be flexible enough to forgive the imperfections of your E.D. Let your E.D. know how you feel when they miss an event or don't make time to prepare before a donor luncheon. Choose your battles wisely. If this is a part of their personality, they are unlikely to change on your account. But let them know their action or lack of action makes you feel isolated or devalued in the process, and will not help the campaign.

Be sensitive to limitations of time for the E.D. Although you might feel your to-do list is as imperative, other staff feel the same way about their program work. Perspective just depends on where you're standing.

5. Be generous with your praise and applause. Let your E.D. know when they've done a good job dealing with a difficult situation, or a public situation, or if they skillfully asked for funds when it was said "it couldn't be done." Let them know you feel their partnership along the way.

Our work takes a certain amount of emotional courage in order to deal with the volume of human contact we commit to have. As you find the ways you and your E.D. work best together, you'll find your organization more receptive to your ideas. And the confidence you and the executive director display as a team, as two people united for a worthy cause, will have tremendous influence on other staff and board relationships.

As you start your work as a fundraiser, or renew the spirit of your livelihood, you learn you can shine brightly as you give others the opportunity to shine too. I do believe the sky is infinitely large enough to hold that many stars. **G.F.J.**

Maria Pilar Gonzales is the Director of Donor Activism at the Seva Foundation.

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Case
Study



The Importance of Having *a Broad Base of Donors*

by Kim Klein

For the past three months, those of us living in the San Francisco Bay Area have been engaged in a struggle to save our commercial-free radio station, KPFA. The story, an unusual one for our times, has been in almost all major newspapers. KPFA is one of five publicly supported stations around the country that belong to a network called Pacifica Radio. Pacifica is acknowledged as the nation's leading broadcast forum for alternative news and dissent.

While there have been tensions between the national Pacifica board and the local KPFA station for some time, according to news reports, things came to a head when a popular and fairly new KPFA station manager, Nicole Sawaya, was fired by an also fairly new executive director of Pacifica, Lynn Chadwick. Sawaya was fired for questioning the percent of money raised by KPFA that was given to Pacifica towards their total budget, why the board was being reconfigured, and other matters that Chadwick deemed insubordinate to question. Chadwick then told the KPFA staff that they were not to report on any of the tensions between KPFA and Pacifica on the air.

Since KPFA's motto for the 50 years of its existence has been "Free Speech Radio," this order guaranteed that KPFA reporters would discuss the firing of Sawaya and the tensions that had led up to it. Chadwick then tried to fire each person who broke her rule, starting with award-winning reporter Larry Bensky, then firing 20-year veteran volunteer Robbie Osman.

The support from listeners for the fired staff was immediate and vocal, as fans began demonstrating outside the Pacifica offices. Because KPFA and Pacifica share the same downtown Berkeley location, Chadwick hired security guards because she and Pacifica staff felt threatened by KPFA fans. Those security guards were ordered to drag Dennis Bernstein, another popular commentator, off the air at the end of his show because he replayed a press conference about the KPFA/Pacifica problems, an act that Chadwick again deemed in violation of her policy.

At this point, in mid-July, Chadwick shut the station down, had the doors boarded up with plywood, and put the staff and volunteers on administrative leave. Every night for two weeks after that, hundreds of people gathered outside the Pacifica offices to protest and dozens slept out in front of the station in what became named, "Camp KPFA."

What does this have to do with fundraising? Every-

thing. What Chadwick, Pacifica board chair Mary Frances Berry, and others failed to take into account is how many people in the Bay Area give money to KPFA and think of it as their radio station. Within hours after Osman was fired, 200 people had assembled in front of the KPFA building to protest the "gag order," chanting, "Free our radio station."

The fired staff realized they would need money to pursue their grievances. Osman asked his friend, Joan Baez, to participate in a benefit concert for KPFA. Berkeley's Mayor, Shirley Dean, secured a large venue, and six days later, 3200 people paying \$20 each arrived at the Berkeley Community Theater to hear Baez, Dr. Loco and the Rocking Jalepenos, Michael Franti and Spearhead and Dar Williams. Pulling off a concert of that magnitude in six days should have been impossible, particularly with no KPFA radio broadcasting to announce it. The fact that it was such a huge success speaks to the grassroots support the station has developed over the years.

A week later, an estimated 15,000 people gathered at Sproul Hall on the University of California campus and marched to Martin Luther King Park for a rally in support of KPFA. Again, the rallying cries were, "This is our radio station," and "Save KPFA—community controlled radio. No corporate gifts. No advertising." In newspaper and radio reports, protesters repeatedly declared, "I give money to this station. This is my radio station." Or, "This community gives a lot of money and time to this station. We want free speech radio—no gag orders."

It is not the purpose of this editorial to take a position for or against KPFA, although anyone reading between the lines may be able to discern my views. Rather, what is important here is that had KPFA been an organization with the majority of its money coming from foundations, it would never be able to rally such widespread support. KPFA has, over its 50-year history, deliberately and systematically built a broad base of community support. Thousands of people count themselves as donors to KPFA, and when they felt their radio station was threatened, they quickly named themselves the "owners" of the station and avidly protested its takeover by the Pacifica board.

Organizations serious about helping communities become powerful, and about being accountable to their communities, must build just such a broad base of donors. When you need them, they'll be there. **G.F.J.**



Giving Figures for 1998

Released by the American Association of Fund Raising Counsel

In 1998, Americans contributed \$174.52 billion to nonprofit organizations, according to *Giving USA 1999*, the Annual Report of the American Association of Fund Raising Counsel. This number represents a 10.7% increase over the revised number—\$157.59 billion—for 1997. Personal giving by living individuals represents the vast majority of charitable contributions—77.3% in 1998, or \$134.84 billion. Bequests, which are gifts made by living individuals in their wills and deferred for transfer to the charity until the death of the donor, accounted for 7.8%, or \$13.62 billion, bringing giving by individuals living or deceased to a total of 85.1% of the total. Foundations gave 9.8%, or \$17.09 billion, a major increase reflecting both the rise in the stock market and a rise in the number of individuals creating foundations. Corporate giving brought up the rear with 5.1%, or \$8.97 billion.

About 43% of all this money was given to religion,

which also accounts for almost half of all nonprofits. Four categories of nonprofits reported increases in giving of more than 20%. These were health organizations (up 20.4%), human service organizations (up 27%), environment/wildlife organizations (up 28.3%) and public/society benefit organizations (up 29.5%). Public/society benefit organizations include organizations working for civil rights, community development and public affairs, as well as organizations that raise money and give it away. Giving to the arts declined slightly, by 0.8%, but the AAFRC also acknowledges that reporting among arts organizations is more uneven than other segments.

For the full report, send \$54.95 to the AAFRC, 37 East 28th St., New York, New York 10016, or call (888) 5-GIVING, or download an order form from <www.aafc.org>. All orders must be prepaid.

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Concerning PF990

As of June 8, 1999, all organizations that are tax exempt under Section 501(c)—which includes (c)(3)s—must make copies of their 990 (the annual return for tax-exempt organizations) available by mail upon request or on the Internet.

You are required to share all the schedules of the 990, including 990 Schedule A, with two exceptions: You are not required to provide the names and addresses of contributors that are included in the actual Schedule A you filed with the IRS; and you are also not required to provide copies of the 990T, the reporting form for Unrelated Business Income.

You have 30 days to respond to a written request. If the request is made in person, you must provide the information by the close of the same business day, unless the request was made at the end of the day. You may charge a “reasonable” fee for reproduction and mailing costs, which the IRS defines as \$1 for the first page and \$.15 for each subsequent page. You may require prepayment, but you must inform the requesting person or agency of that requirement within seven days of receiving their request for copies.

You can also post your documents on your own web

site, but the Internet posting must allow the user to download your information at no cost, and view and print it in a manner that exactly reproduces the IRS document. Your Internet posting cannot require the use of special hardware or software unless the software is readily available to the public free of charge.

If you think that opponents of your organization are using requests for 990 information to harass your organization, you can apply to the IRS to be relieved of the requirement to respond. You will have to persuade the IRS that there is a campaign to disrupt your organization. Even without IRS determination of harassment, you are permitted to ignore all but the first two requests for information received within the same 30 days from the same individual or address—or all but the first four from the same individual or same address received within a one-year period.

The Disclosure Requirements are contained in IRS regulations 301.640(d)2–5.

Information taken from TACSNEWS, a publication of the Technical Assistance Center of Portland, OR.

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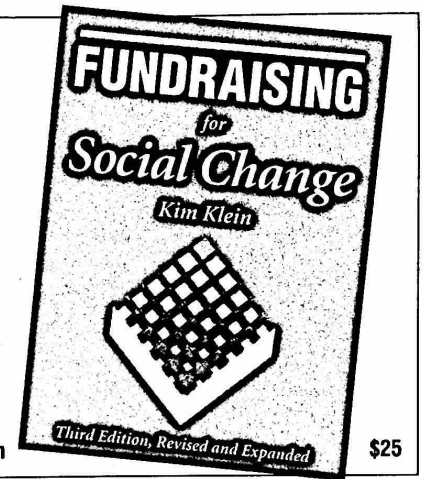
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