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VOLUME 25 / NUMBER 2 ▪ MARCH / APRIL 2006

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THIS MURAL, "I DEAL, I DREAM, I DO" WAS PAINTED BY EIGHT TEENAGE GIRLS FROM BROOKLYN, UNDER THE GUIDANCE OF LEAD ARTIST KATIE YAMASAKI AND ASSISTANT MENSHAHAT EBRON, AS PART OF GROUNDSWELL'S VOICES HER'D PROGRAM.

Grassroots Fundraising Journal

The *Grassroots Fundraising Journal* is published six times a year: January/February, March/April, May/June, July/August, September/October, November/December.

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The *Grassroots Fundraising Journal* is a member of the Independent Press Association.

GRASSROOTS FUNDRAISING JOURNAL
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Oakland, CA 94612
PHONE: (888) 458-8588 (TOLL-FREE)
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Periodicals Postage Pending at Oakland CA 94615
Postmaster — send address changes to:
1904 Franklin Street, Suite 705
Oakland CA 94612

ISSN No. 0740-4832

LETTER FROM THE PUBLISHER

KIM KLEIN

Because this 25th year is a big anniversary year for the *Grassroots Fundraising Journal,* I have found myself comparing these times with the early years of the *Journal* (the early 1980s). It is fun to say that we started the *Journal* in the last century — it makes us seem venerable!

The articles in this issue reflect both what has changed over time and what hasn't. What hasn't changed is the creativity found throughout the nonprofit sector in solving problems. One perennial problem — nurturing an effective board of directors—is addressed in this issue in "The Elephant in the Board Room," which redefines the problem and presents some of the creative thinking currently going to solving it. My co-authors and I reviewed the literature and interviewed people about how we can think differently about organizational structure. As you will see, we made some progress, but we have a ways to go, and we hope you will help us.

One of the things that has changed completely can be found in Madeline Stanionis's article on using e-mail to raise money. If you had told me in 1981 that someday we would all sit at a computer monitor for three or four hours a day answering messages that appear as if by magic on our screen, I would have said you were crazy, and anyway, where would we get the time? When we started the *Journal*, some organizations did not have even have answering machines (now we sound not only venerable, but ancient). Madeline's article shows how today's technology can work for us. Most interesting to me are her tips on writing e-mail, which is a new writing genre altogether.

One thing that hasn't changed but desperately needs to is how organizations treat development people. The turnover in fundraising staff has long been remarked on—with 18 to 24 months being a common tenure of a development director. Mary Humphries, whose last article, "The Role of the Primary Fundraiser," appeared in 2003, discusses the need for a new relationship between an organization and their fundraising staff and for getting systems in place to capture what fundraising staff know when they do leave. Friend and colleague Dolores Garay says, "We need to claim fundraising as the righteous work it is." I could not agree more.

Speaking of that righteous work, make a plan now to attend our 25th Anniversary Conference, "Raising Change: A Social Justice Fundraising Conference," on August 4-5, 2006 in Berkeley, CA. Sponsored by the *Grassroots Fundraising Journal,* Building Movement Project, and the Grassroots Institute for Fundraising Training (GIFT), the conference is a chance to learn fundraising skills in a social justice context and explore the politics of funding and the role of fundraising in movement-building. Read all about it and register today (it's filling fast!) at www.grassrootsfundraising.org. While you're there, please consider making a donation to help keep the conference fees low. If you can't attend the conference, you can still donate toward its success (we'll have reports from the conference in future issues). I look forward to seeing you there and to hearing your ideas about governance in the meantime.

THE ELEPHANT IN THE BOARD ROOM: ROUND ONE

By KIM KLEIN, AMANDA BALLARD and MANAMI KANO

Most people have heard the phrase "the elephant in the living room" to refer to a giant problem that no one is talking about. We who work in the nonprofit sector have a number of elephants, but the biggest one in the herd is the board, followed closely by the many efforts to fix the board. We act as though a little restructuring here and a little training there will fix up a board so that it's productive and functioning smoothly again. But we also know deep down that this is not the case. It is time to name this elephant and to bring into the open a real process for finding out how boards could actually work.

Here at the *Grassroots Fundraising Journal* and a sister organization, the Building Movement Project, we have been on a search for a model or models of board functioning that would actually work for the non-traditional organizations that comprise our constituency. With funding from the Brainerd Foundation, we conducted an intensive literature review and an in-depth examination of some organizations that have tried alternatives to the various traditional board models. We have led a few workshops, held a number of phone interviews, and had dozens of informal conversations with board members, development directors, executive directors, consultants, funders, volunteers, and academics about the topic of board functioning.

Our focus is on organizations with budgets of less than $2,000,000, with boards that are self-selected or elected, and with missions that focus on issues of social change, social justice, advocacy, or the environment. These broad categories often include organizations devoted to arts and culture, community organizing, social service, and public interest law, as well as think tanks, and so on. We are most interested in organizations that care about diversity on the board and staff and that seriously want to be institutions, not just the vision or hobby of one or two people.

The organizations we work with must raise money every year. They generally do not have endowments, and they are not so famous as to be able to expect their annual operating budgets to appear without significant effort. Their board members are, with a few exceptions, not wealthy, and fundraising is a struggle. Any new suggestions must include board involvement in fundraising in a significant way without changing a commitment to economic diversity.

With this paper, we want to share what we have learned so far and suggest some new ways of thinking about boards. Even more important, we want to initiate a dialogue in order to examine this elephant: What does it look like? How did it get this way? How can we begin to solve the problem the elephant represents? We hope you will share your own thoughts on this topic and your experience in trying new things: What has worked, what hasn't? Do you think what we are suggesting might or might not work, or how could it be improved?

Consider what follows "round one" of this discussion.

THE PROBLEM, THE PREMISES, THE QUESTION

We start by identifying the problem as we see it, followed by two premises that must underlie any attempts to "fix" board functioning. Then we articulate the main question that needs to be answered.

The Problem: By law, nonprofits must be governed by a board of directors. However, most boards do not function well.

Background: When nonprofit law was created in the 1950s, the model of a board comprised of volunteers who had abundant time to carry out the work made sense: there were only 30,000 nonprofits, which translated into about 510,000 board slots (assuming an average board size of 17 members). At that time, what we think of as the standard model of board functioning also made sense: volunteers gave their time to supervise paid professionals; assumed legal, moral and fiscal responsibility for the organization; engaged in fundraising, created policy, and evaluated programs. Board members ideally did all this while maintaining harmonious relationships with staff.

Moreover, this same group of people was expected to recruit new board members who moved into the work seamlessly, and all this happened year in and year out. While this structure might have worked then, today its success as a model seems about as likely as being struck twice by lightning.

Fifty years and counting after the law was created, things are vastly different: there are *1.5 million* nonprofits; they need about *25.5 million* people to fill their board seats. Economic times have changed: whereas previously many people, mostly women, had time to volunteer on boards, today more women are working full time and both men and women are often working more than one job. Volunteer time for board participation has diminished even as the need for it has increased.

A major corollary of this shift in people-power is that those who do join boards often don't learn all they need to fulfill their fiduciary responsibilities. They learn on the job, they learn badly or only part of what they are expected to do — and both board and staff end up frustrated.

Premise #1: To be effective and able to roll with the winds of change; to remain fully mission-driven, with a diversity of staff, volunteers and funding yielding enough money and time to do the work; to really be about the business of making their communities better places to live — to accomplish all this, nonprofit organizations need strong boards.

Premise #2: Staff and board members must have a strong commitment to the mission of the organization. This commitment implies a clear understanding of the work of the organization and an ability to articulate that understanding to friends, colleagues, donors, funders and the general public.

The Question: What kind of model or models of board functioning will work — that is, enable these two premises to be fulfilled — for the kinds of organizations we are most concerned with?

OLD SOLUTIONS

A small industry of consultants (including those associated with the *Grassroots Fundraising Journal*) has arisen to try to help organizations answer this question. There are literally thousands of articles, dozens of web sites, and hundreds of books and videos with prescriptive solutions to the problems boards face.

Responding to the first premise, many consultants, practitioners, and academics have come up with a variety of structures to try to improve how boards operate. Each of these structures has useful features. Nonetheless, new problems keep cropping up. We are no sooner done with advising one organization than a dozen more are on the horizon needing help. So, while we have been working around the elephant, we may have merely created new paths for her to lumber along until she reaches yet another dead end.

NEW DIAGNOSIS: FOCUS ON PROCESS, NOT STRUCTURE

There is in fact no *structural* solution to this problem. Many boards work for some period of time — the chair is good, the ED works well with the board, the committees click. Every structure works for a while, and then doesn't seem to work any longer. Some new structure is needed to kick-start the board into better functioning.

What we need is to analyze, document and develop the *process* by which an organization would choose one structure over another at any given time, and the process by which they would move on to a new structure when the old one no longer works. In this new approach, all structures would be temporary and permeable, more like tents than buildings.

The solution to the problems of boards is, in other words, a *process* solution. Instead of subscribing to the paradigm, "We restructured and now we don't need to do that," we would instead use the notion, "We have figured out how to continually create ourselves so that we are operating from our individual and collective strengths, which are constantly evolving."

The process we are looking for has these characteristics:

- Simple to use
- Easy to understand
- Replicable
- Inexpensive to implement
- Will produce fairly immediate payoff to maintain motivation
- Able to cross class, race and age lines
- Applicable to a range of issues (environment, social service, organizing, arts, etc.)
- Useful for national as well as local groups
- Able to make a measurable difference in six months
- Flexible

WHAT WE LEARNED FROM THE LITERATURE REVIEW

The literature about boards comes in two broad types: prescriptive and academic. The prescriptive literature is what Grassroots Fundraising, CompassPoint, BoardSource, and many writers and consultants have created. Although our experience has shown us that this literature is helpful, and although we continue to produce it, we know it only goes so far.

Prescriptive literature instructs boards on how to be effective, usually recommending that they use certain structures, get a lot of training, do proper recruitment, run their meetings in interesting ways, and so on. Academic literature, on the other hand, proposes large theoretical changes or analyzes the problem. Most academic literature suggests solutions tentatively; the writers are clear that their suggestions have not been tried. Academics and practitioners rarely seem to talk with each other, and it seems from the literature that practitioners rarely translate the suggestions developed from academic research into prescriptive actions. Most rare was literature of either kind that spoke specifically to our types of organizations.

Even so, much of what we read was thought-provoking and helpful. You can download an annotated bibliography at www.buildingmovement.org/artman/publish/resources.shtml.

Two books were of particular help in creating the suggestions contained in this essay: *Governance as Leadership: Reframing the Work of Nonprofit Boards,* by Richard P. Chait, William P. Ryan, and Barbara Taylor (BoardSource, 2005), and *The Structure of Women's Nonprofit Organizations,* by Rebecca L. Bordt (Indiana University Press, 1997). Also useful was an unpublished paper by Pat Bradshaw and others called "Nonprofit Governance Models: Problems and Prospects" (summarized at bsbpa.umkc.edu/mwcnl/research/renz/boards_and_governance.htm).

In *Governance as Leadership,* the authors suggest that boards think and govern more as leaders than as managers; that in addition to fiduciary and strategic governance, and beyond offering advice, expertise, and fundraising, boards also engage in what the authors call "generative leadership." Rebecca Bordt looks at women's organizations in New York City founded between 1968 and 1988 to document how ideas about organizational structure have changed. She finds that "Women today are creating hybrid forms of organization that combine, in innovative ways, the best characteristics of both" bureaucracies and collectives. Pat Bradshaw and her colleagues note that there is no "one best way" of nonprofit governance. They examine existing models and encourage innovation and creativity in creating new models that are hybrids of existing and emerging models.

KEY LEARNINGS

Two key points emerge from both the literature review and our interviews with organizations that have tried various alternative models. The first is that there is no one fixed solution to the problem; as noted above in our new diagnosis, organizations are not only going to have to find what works for them, they must also — and this is the critical feature — anticipate how they will need to change models as their circumstances change.

The second key point is that even though there is no one way, there are five things that all workable processes and models have in common:

• As mentioned earlier, ***a commitment to and clear understanding of mission.***

• ***A process for surfacing and dealing with disagreement in a principled way.*** By principled, we mean people feel free to express their opinions and are open to hearing the opinions of others. Too often, the executive director, board chair, or even individual board members equate disagreement with disrespect and questions with criticism or lack of confidence in organizational leadership. Boards whose membership crosses cultural lines may have someone who is comfortable interrupting or talking loudly right next to someone who finds those behaviors intimidating or rude. Different cultures ascribe different meanings to the same words; "I'll try to do that" can mean anything along the spectrum from "I will do everything I can to get that done" to "No way am I even going to start on that." Boards that include people whose first language is not English (or the dominant language of the board), can have misunderstandings from the way things are translated.

• ***Leaders, especially at the executive director and board chair level, who want to create a working team.*** The best leaders are those who genuinely like working with people and are willing to spend time on this process. Our interviews and workshops revealed control issues in which there is a refusal to share or delegate power or a desire to be the main person associated with the organization. We were told by two different board chairs, "I don't like meetings." An executive director said, "I founded this organization; it is mine, and I should have the most say about what happens." While people like this may be gifted, they are not suitable candidates for the jobs they have.

• ***A culture of both accountability and forgiveness.*** When someone says they will do something and they don't, it should not be ignored, but neither should it be used as the last word about this person. Too often, we find that an executive director equates failure by a board member to keep one commitment as an inability to keep any commitment. Similarly, staff and consultants will mistake board members' doubt and uncertainty about their ability to raise money as a refusal to be part of the process of fundraising. Over time, a culture develops in which failure to follow through on the part of the board and "I'll do it myself" on the part of the director become the norm.

• ***Training and education.*** People cannot be expected to know their job if it is not explained to them, often several times and in several ways. This element of successful board functioning is already well developed and much exists in the prescriptive literature.

NEW WAYS TO LOOK AT PROBLEMS

Now let's look at three common organizational issues and how they might be solved using both the new diagnosis and the principles just enumerated.

PROBLEM 1: No One Wants to Chair the Board

To solve this common problem, we try to figure out its component parts and address each part, rather than following the usual route, which is to browbeat someone into reluctantly taking on the role. The first step is to ask each board member what exactly they don't want to be or do when they say they don't want to be the chair and to push each person for a deeper explanation until we have a very specific list. For example, if someone says, "I don't have the time," we ask, "Time for what? What are you going to be asked to do as the chair that you are not asked to do now?" The list we develop will have some or all of the following reasons for not wanting to be board chair: don't like to run meetings, don't know how to read a balance sheet, schedule is too chaotic to show up for every meeting, not good at dealing with disagreement, don't understand exactly what the chair does. Using this list, one or more of the following things could happen:

- ***One person could realize that she thought the role of the chair had far more responsibility than it does, and that she can make a commitment to be the chair.*** If everyone agrees she would be a good chair, the problem is solved without changing the structure of the board at all.

- ***People could divide up tasks, which is a common structure now.*** One person designs the agenda and runs the meetings; another is in charge of all other tasks.

- ***The entire board could realize that they need some training.*** Maybe no one knows how to read a balance sheet, or maybe everyone would like a training in conflict resolution.

- ***The group could decide that the position of chair will rotate, with each person holding the job for some short period of time,*** such as two months, or four meetings, or through a hiring or a capital campaign.

There are other reasons that people might not want to be the chair, such as board members are intimidated by the executive director; several people on the board actively dislike each other; the organization is going through a scandal or a difficult transition. They are too complicated to deal with here but would make interesting case studies.

PROBLEM 2: Executive Director Feels that the Board Micromanages

Overinvolvement at too detailed a level is one of the most common complaints executive directors have about active boards. Sometimes this tension can be resolved by a detailed clarifying of roles and responsibilities. In younger grassroots organizations, board members pitch in and do what needs to get done — often without a lot of thought as to whether it is their job. As the organization grows, board members may keep doing that, without realizing that their work begins to interfere with that of the staff.

Sometimes, however, there is a fundamental disagreement about roles. Perhaps the ED does not want the board to be engaged, except in fundraising. Chait and others point out that such an ED attempts to keep the board at such a great distance from day-to-day operations that they actually have little idea about what is going on. In such a situation the board's governing role can fade and the staff-board relationship easily become adversarial.

To solve this problem will require a more in-depth examination. Too often organizations in this situation look only at the role of the board. A new approach would also look at the role of the executive director: What would it take for the ED to welcome the work of the board? What work would be both useful and in keeping with the board's mandate? What does the ED actually need and what does the board need from the ED to work as team members all playing on the same side? What new roles might the board look to develop, such as Chait's "generative leadership"?

Micromanaging lends itself to an easy solution: stop it. But moving right to a solution will obscure the real issues, so in this problem, the goal would be to stay in a questioning, not-doing mode for a while to make sure that all the right questions had finally surfaced.

PROBLEM 3: Meetings Are Boring

The traditional meeting format is soporific. A series of reports, some requiring discussion and some decisions, follow one after the other. Motions are made and passed. A board member's only hope is that one of their colleagues has an entertaining presenting style or that the meeting is so well run that it doesn't last long.

Using a new model, the people designing the agenda might use different training and teaching techniques at each meeting or for each topic. For each item we would ask, "What do we want from this item?" More understanding? More engagement? Better follow-through? Volunteering for tasks? Final or interim decisions?

Moreover, we might ask, how can this agenda item come to life so that the board can put its best thinking on it? Perhaps one item would be done as a skit, some as role plays, some in the whole group, some in smaller groups. Board members might be asked to draw or to take a few minutes to write something, then pass it to the next person. Rather than being over quickly, the sign of a good meeting could be that people leave reluctantly, the way they would a great lecture or a stimulating dinner party.

The New Models

A number of new models of organizational behavior are being described as both practitioners and theorists grapple with the problem of boards. Dee Hock, the former CEO of VISA, coined the term *chaord* to describe an organization that runs on a synthesis of the best elements of chaos and order, while being dominated by neither. The concept of chaord has spawned a small industry itself: enter the word into a search engine and read some of what comes up. For our purposes, the notion of chaord — of "adapting organizations to their environment from the inside out," as one web page puts it — came close to describing the process we were looking for: flexible, creative, able to change quickly, fun, with ownership shared by the whole group, tasks divided over the group, and members of the group able to do each other's tasks, lots of communication, and powered by a deep commitment to values. (A familiar metaphor that captures some of the same elements is "team.")

Pat Bradshaw and colleagues looked at a number of organizational models, including chaord, and developed a hybrid they called an "emergent cellular" model. While, as she admits, the model "is so new and is currently not well developed either theoretically or in practice," it is nonetheless an interesting one to consider. Here is how Bradshaw describes it:

> The emergent cellular model is characterized by distributed networks and continuous and organic innovation.... Cellular organizations are made up of cells (self-managing teams, autonomous business units, operational partners, etc.) that can operate alone but that can also interact with other cells to produce a more potent and competent organizational mechanism. It is this combination of independence and interdependence that allows the cellular organizational form to generate and share the know-how that produces continuous innovation.

Bradshaw noted one organization that had committed itself to this emergent cellular model of governance — the then newly created Canadian Health Network (CHN). CHN's job is to provide reliable, easy-to-access, Internet-based health information to Canadians. CHN was itself a network of at least 500 health organizations throughout Canada, so trying this new model with them allowed a number of ideas to be tested. CHN renamed the model "organic mobilization" and described it this way:

> Organic mobilization is based on the metaphor of healthy non-cancerous cells in the human body. Healthy cells grow, replicate and ultimately die. In contrast, cancerous cells cannot die and are characterized by unbridled growth. Similarly, healthy cells can commune with other cells around them and they have tumor-suppressing genes.

Our proposal is to use these concepts of chaord, team, emergent cellular model, and organic mobilization to create discussion about new board models. We hope that some organizations will be willing to try these concepts on and report as they develop some real experience with them.

As you can see, the process model is not applied in the same way for each problem. For some problems, we look for very practical, but out-of-the-box solutions. For other problems, we seek to surface all the questions and know that a solution proposed too early will simply cut off important analysis. For still other problems, we look for all kinds of ways to engage people, knowing that adults have myriad learning styles and that if we are going to take advantage of all the people in the room, we have to have something for each of them. (We intend to gather and publish more case studies as we go along.)

CONCLUSION OF ROUND ONE

Boards are the mainstay of nonprofit organizations, but as currently configured and structured, they are not doing the job they must do. One way to approach how boards might function more effectively is through a radical rethinking away from the notion of searching for the one fixed structure that will work and toward a more fluid understanding of the variety of ways in which boards can carry out their work. New understandings about what makes boards work and new models propose that boards remain flexible, engaging a variety of people in a variety of structures that change as needs change. Fluidity is the main characteristic of these new models. "How can we best do what we need to do now?" becomes the operational question.

YOUR TURN: ROUND TWO

We very much want your feedback, your experience and your questions. Perhaps you have a thorny organizational issue, and you would like to see what a process solution might look like. Perhaps we have not been clear enough in some of our points: Please feel free to ask specific questions. Perhaps you think there is a whole other way of thinking about governance: Please propose it.

The goal of this project is to generate discussion and to continually revise our thoughts every two or three months to reflect new thinking, or to compile opposing thoughts in a "Point, Counterpoint" fashion. In other words, just as with the board functioning, it is our goal to discover. Please join us in this organic process. The outcome is bound to strengthen us all. GFJ

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Love 'Em OR Lose 'Em
Keeping Good Fundraisers

BY MARY HUMPHRIES

EDITOR'S NOTE: This article is adapted from an excellent report, "Conservation Fundraising at a Crossroads: Creating Healthy Fundraising Organizations," published in 2005 by Training Resources for the Environmental Community (TREC), a capacity-building organization serving environmental nonprofits. Although that report is based on the author's work with environmental organizations, her analysis and recommendations are right on target for a broad range of organizations with paid fundraising staff. You can read the full report at www.grassrootsfundraising.org.

Imagine this scenario: You joined an organization six months ago as development director. Recently, both the board and executive director have complained that you haven't raised an amount equal to your own salary yet. Furthermore, the executive director and the program director have decided to launch a new program that will require $100,000 in seed money. You were not consulted about this decision, but you are expected to raise most of the money.

I know that executive directors, board members, and other staff don't deliberately try to make the fundraiser's job harder, but their actions can do just that. If the same scenario plays itself out at this organization over and over again, you can bet that the fundraiser will leave out of sheer frustration.

Consider this: In a recent eight-month workshop series that Training Resources for the Environmental Community (TREC) conducted for environmental organizations, participants included, among others, 12 full-time fundraisers. By the time the series ended, only six of those 12 remained. In less than nine months, half of those 12 full-time fundraisers had left their organizations; moreover, when they joined the workshop series, most had occupied their positions for only six months or less.

Granted, people move, get pregnant, return to school. But let's face it, organizations are also driving fundraisers away. What's going on? I think four primary reasons account for such high turnover. All of these reasons reflect on whether a group regards its fundraising staff person as a professional whose work is integrated into the fabric of the organization.

Unreasonable Expectations

It takes at least one, and usually two years before a fundraiser hits their stride. To expect someone to generate large sums of money in anything less than a year — unless extraordinary circumstances prevail — is completely unfair. Many new fundraisers are walking into situations where fundraising protocols, systems, and documentation either don't exist or are so ancient as to be worthless. Simply developing fundraising procedures, establishing relationships with staff and board, and becoming familiar with the organization's work and fundraising history can take six months to a year.

To expect someone to generate large sums of money in anything less than a year — unless extraordinary circumstances prevail — is completely unfair.

Lack of Authority

Fundraisers are often denied the strong voice they deserve in an organization. Few decisions that any organization makes don't involve money. Not every decision requires the feedback of the fundraiser, but certainly the larger decisions do. Yet I am stunned by the number of decisions that are made — hiring new staff, opening satellite offices, launching new programs — without seeking input from the fundraiser. Who better to advise whether money can be raised to support new initiatives? When fundraisers are repeatedly excluded from deliberations that directly affect their work, they can be forgiven for thinking that their opinions don't matter much. It also reinforces the sense that fundraisers are strictly money-generating machines who have little or no role to play as strategic planners. This can be terribly demoralizing and enfeebling.

Lack of Hiring Due Diligence

Organizations are not always hiring the right people or clearly articulating their expectations of them. Many new fundraising staff are young and enthusiastic but completely unprepared to handle the complexities and stress of the work. Others are a bad cultural fit. Some possess the fundraising skills needed but lack personal warmth, grace, or poise. And some fundraisers are simply hired out of desperation. Organizations need to identify carefully what skills and personal attributes they want candidates to possess and they need to specify clearly what it is they want that person to do. In the absence of one or both of these requirements, we can most likely expect to see an ongoing exodus of fundraisers from our organizations.

Low Compensation

A fundraiser's pay should be roughly equivalent to that of other staff with similar backgrounds. OMB Watch, a Washington-based group that monitors government spending, reported that the weekly earnings of charity employees (excluding private colleges and nonprofit hospitals) began to drop significantly in 2003. Indeed, the report states, "In the year ending June 2004, weekly earnings fell 5.2 percent," representing a "significant break from recent trends." Declining salaries means that it will become increasingly difficult for nonprofits to attract and keep strong, capable fundraisers. Look at what fundraisers in your organization are paid and make sure that it is fair, taking into account such things as education, tenure in the field, and previous experience.

TURNOVER COSTS MONEY

Think about what an organization spends to advertise for a job and then how much time one, two, or sometimes three staff people spend reviewing resumes, interviewing candidates, checking references, and then mentoring and training the new hire. One national environmental organization recently spent a year and a half searching for and finally hiring a development director. Regional and local groups are frequently finding that they have to extend application deadlines or are hiring an interim fundraiser — someone who isn't ideal for the job but who can attend to the most pressing fundraising tasks until a suitable candidate is found.

All of this costs organizations too much money. Each time a fundraiser is lost, there are "disruption costs" as well — renewal letters not sent, proposal deadlines missed, and key donor relationships broken.

Turnover cannot be avoided, but the rate at which it is now occurring is costing organizations precious dollars — dollars they can ill afford to surrender every 12 or 24 months. During two recent years of intense fundraising work with 45 client groups, for example, TREC witnessed the departure of 28 full-time fundraisers — a staggering turnover rate of 61 percent. This is simply untenable.

MINIMIZING THE EFFECTS OF TURNOVER

Of course, all organizations experience some turnover — even well-suited fundraisers move on to other jobs, other challenges. But here is a rather peculiar phenomenon: Fundraisers learn skills, acquire knowledge, collect hundreds of tips and techniques, yet fail to impart them to their successors. It's true that people often leave organizations on short notice, but that's no excuse for failing to make the transition period easier for all concerned.

Transferring knowledge from one peer to another ought to be a mandatory and clearly understood job responsibility. Training others constitutes one of the best things a person can do for the organization for which they work. So it's imperative that fundraisers document what they do. I don't mean hastily written notes in illegible writing. Fundraisers need to develop detailed, typewritten explanations, instructions, and references — an operations manual that anyone can easily understand and use. Starting at square one each time a new fundraiser is hired costs the organization far too much money and is a frivolous waste of time and effort.

Fundraisers need to develop detailed, typewritten explanations, instructions, and references — an operations manual that anyone can easily understand and use.

The departing fundraiser needs to make sure that someone in the organization knows exactly where important information is stored, both electronically and physically — the crucial fundraising plan and calendar, training manuals, prior fundraising letters, vendor contact names, proposal deadlines, previous fundraising plans, pledge forms, stock transfer information, and so forth.

Organizations would be wise to develop specific "departure" protocols and to implement them each time a fundraiser leaves. When a fundraiser gives notice, they should be asked to stay long enough to spend two weeks to a month training the new hire. In circumstances where it takes several months to hire a suitable candidate, it's worth asking the departing employee if they'd be willing to provide some crossover time — by phone, e-mail or in person — when the new staff member comes on board. Of course, they should be paid for any time they spend doing this.

Mentoring others in an organization — paid staff, board members, or volunteers — is an extremely valuable practice for both the fundraiser and the organization and a good use of time. The fact that someone other than the fundraiser knows how to do even the most rudimentary fundraising tasks will be especially key during transition periods, when outgoing staff have left but incoming staff have not yet arrived. It means, for instance, that the organization isn't left scrambling to meet important

Fundraising as a Profession

If someone were to ask me what one thing I would like to see change in grassroots fundraising, my answer would be this: that all of us treat fundraising as a profession and fundraisers as professionals. Although I'd be hard pressed to think of a single individual who deliberately chose fundraising as a career, it is indeed just that — a career. It's hard work, frustrating and scary — remember the first time you asked someone for money in person?

But it is also tremendously rewarding and inspiring. Fundraisers get to meet all kinds of people who share their passion and commitment for their work. We build personal relationships with generous donors — people who stand with us when we celebrate our successes and lament our losses.

Typically, fundraisers are the people who bear the weight of keeping an organization financially afloat, sometimes perpetually trying to avoid cash-flow shortages while simultaneously struggling to earn the respect they so well deserve. They often feel alienated from the rest of the organization because their work is seen as tedious, distasteful, and completely divorced from program priorities. Organizations that fail to appropriate dollars for fundraising or neglect to consult fundraisers when contemplating costly undertakings reinforce the message that fundraisers aren't equals and fundraising isn't commendable work.

Treating fundraisers as the professionals they are will create a much stronger leadership team, resulting in sharper work and better fundraising for your organization.

proposal deadlines or that routine tasks such as renewal and special appeal letters remain on schedule.

While it may seem that there simply is no time to invest in training someone else, consider this: It takes no more than half an hour to give someone enough information and basic instructions on how to write a renewal letter. It will take that person about an hour and a half to write that letter. If you have 1,000 members and 20 percent of them (the industry norm) respond to this renewal request with a $30 gift, you've just earned $6,000 — even if your fundraiser has left the organization. I know of few organizations that can honestly say they couldn't use or wouldn't notice the absence of $6,000.

So, before deciding that it's just not feasible for the current fundraiser to spend the time teaching, and others to spend the time learning, how to do one or more specific fundraising tasks, think about how much revenue might be lost if no one knows how to do that task.

HOPE FOR THE FUTURE

Here's a hopeful observation: newer conservation groups — those that were incorporated in the last decade or so — often differ from their older brethren in one very significant way — the value and necessity of fundraising have been encoded in the organization's DNA. Staff and board members of these groups attend fundraising trainings and quite willingly solicit gifts and ask people to join their organizations. They aren't fearful about asking for money and they consider the task an integral part of their ongoing work.

I believe these organizations are far more aware of just how tough it is to raise money — many of them started soliciting individual gifts in late 2000 and after, when the stock market began to spiral downward, when the nation was mourning and attempting to cope with the tragedy of September 11, and when the decline in government funding made competition for individual dollars much more fierce.

I also think these younger groups have had the benefit of growing up in an era when board standards, board accountability, board trainings, and board roles and responsibilities are far better understood and accepted.

Older groups can, I believe, address what may seem like intractable problems with a similar vision for a better way of working with fundraising staff and a commitment to making the organizational and cultural shifts necessary to pursue a different path. GFJ

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Raising Money *with* *E-mail*

BY MADELINE STANIONIS

EDITOR'S NOTE: This article is adapted from the book, *Raising Thousands (if Not Tens of Thousands) of Dollars* with Email, by Madeline Stanionis, (Emerson & Church, 2006). Visit www.emersonandchurch.com for more information or call 508-359-0019.

Let's start with some rudimentary math. If you want your e-mail message to generate 10 donations, then:

- (At least) 1,000 people need to receive your message
- (At least) 250 people need to read (that is, "open") your message
- (At least) 50 people need to click on the link to your donation page

It's a numbers game, of course, just like other direct marketing mediums. It's always about the list. Who they are, how they got there, what they want, and how deeply they're connected to your cause. Take those 1,000 people. If yours is like many organizations, only about 200 are also on your direct mail file. The rest… well, how *did* they get there?

Building an online list is the tricky part of raising money with e-mail. And building a strong, engaged, generous list? That's even trickier.

Two of the best ways to do it are bringing your offline donors online and attracting new donors with compelling issue or advocacy-based campaigns. Then, you can send them your most powerful message — how to compose that message is the subject of the second part of this article.

BRING YOUR OFFLINE DONORS ONLINE

Inevitably, clients that hire my firm are interested in having us build a list of new prospects. How is it good for their overall fundraising program, they ask, if we're merely moving donors from Column A to Column B, from their direct mail program to their online program?

Here are the reasons I give:

A) An online program is a service, offering your donors another way to communicate with you. Chances are they're purchasing airline tickets and books online already. Some will expect the same convenience when making donations.

B) Increased communication builds a deeper relationship. A donor who receives a newsy, inspiring e-mail a few days before your direct mail piece arrives just might be more inclined to make a gift.

C) Donors with whom you have a relationship are some of the best people to help you build your online list. You've already sold them on your cause, and they're often quite willing to tell a friend or two about your good work.

Note: I'm not suggesting you remove donors from your direct mail and telemarketing programs once you've brought them online. Not at all! You don't want to risk losing your more predictable income while exploring this new medium. I'm simply saying there are real advantages to bringing them online.

Now, in terms of obtaining e-mail addresses from your offline donors, there are five principal ways to do this:

1. In your letters, send your donor online to make her gift. Here's an example from the American Society for the Prevention of Cruelty to Animals. As you can see from the example below, the donor who prefers the ease of making a gift online is given a specific web address (not the organization's home page) to visit so the gift can be tracked.


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www.aspca.org

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☐ $30 ☐ $25 ☐ $20 Other $______

To make your gift go to work faster, log onto www.ASPCA.org/RENEW

Madeline Stanionis
Donordigital
182 2nd Street Suite 400
San Francisco, CA 94105-3801

Please return this form and your contribution today in the envelope provided. Please make your check payable to the ASPCA. Your contribution is tax-deductible as provided by law.

See reverse to change your contribution and/or important information.

2. Ask for an e-mail address on all your printed forms. And give your donors a good reason to provide their address: "E-mail is the most cost-effective way for us to keep you informed on how we're putting your support to work."

3. Put an insert into your thank-you letters and acknowledgments encouraging your donors to take advantage of the many features on your website.

4. Bring your donors online to buy tickets or to participate in special giveaways or offers. I've seen groups offer calendars, fleece vests, gift certificates, even chances to win vacation trips.

5. Send your direct mail list to a firm that will search databases to try to match your donors' e-mail addresses.

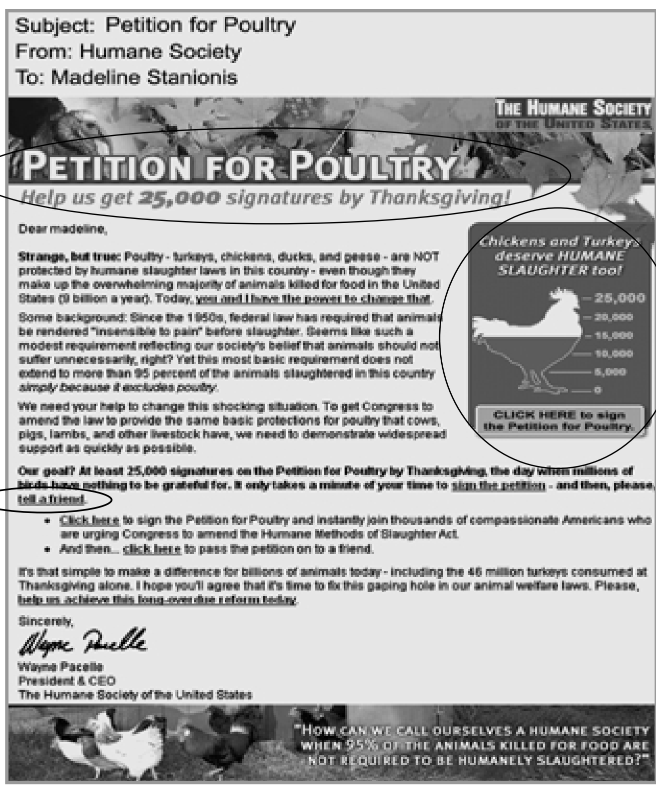
This is called "appending." It's fairly inexpensive (15 to 25 cents per e-mail) and may be worth a test. However, keep in mind that the matched names may not perform well and there are privacy and permission problems to think about.

CONDUCT AN ISSUE OR ADVOCACY-BASED CAMPAIGN

You've likely seen online advocacy campaigns inviting you to "Tell your legislator that…" or "Sign this petition for…." People who add their name to your list in the context of supporting a particular issue are often excellent prospects for gifts.

To illustrate how this type of campaign works, let's take a look at The Humane Society of the United States. They use clear, goal-oriented advocacy campaigns to achieve their objectives and to build their list. A perfect example: the Petition for Poultry, a campaign launched in 2004 to include poultry in our country's humane slaughter laws.

Here's the e-mail the Humane Society sent to its house list to kick off the campaign, with key elements circled:


Subject: Petition for Poultry
From: Humane Society
To: Madeline Stanionis

THE HUMANE SOCIETY OF THE UNITED STATES

PETITION FOR POULTRY

Help us get 25,000 signatures by Thanksgiving!

Dear madeline,

Strange, but true: Poultry - turkeys, chickens, ducks, and geese - are NOT protected by humane slaughter laws in this country - even though they make up the overwhelming majority of animals killed for food in the United States (9 billion a year). Today, you and I have the power to change that.

Some background: Since the 1950s, federal law has required that animals be rendered "insensible to pain" before slaughter. Seems like such a modest requirement reflecting our society's belief that animals should not suffer unnecessarily, right? Yet this most basic requirement does not extend to more than 95 percent of the animals slaughtered in this country *simply because it excludes poultry.*

We need your help to change this shocking situation. To get Congress to amend the law to provide the same basic protections for poultry that cows, pigs, lambs, and other livestock have, we need to demonstrate widespread support as quickly as possible.

Our goal? At least 25,000 signatures on the Petition for Poultry by Thanksgiving, the day when millions of birds have nothing to be grateful for. It only takes a minute of your time to sign the petition - and then, please, tell a friend.

- Click here to sign the Petition for Poultry and instantly join thousands of compassionate Americans who are urging Congress to amend the Humane Methods of Slaughter Act.
- And then... click here to pass the petition on to a friend.

It's that simple to make a difference for billions of animals today - including the 46 million turkeys consumed at Thanksgiving alone. I hope you'll agree that it's time to fix this gaping hole in our animal welfare laws. Please, help us achieve this long-overdue reform today.

Sincerely,

Wayne Pacelle
Wayne Pacelle
President & CEO
The Humane Society of the United States

Note these important components: 1) A catchy name and an urgent goal, 2) a graphic insert containing a quick description of issue, goal, and how the recipient can help, and 3) A specific request that the recipient pass the petition on to a friend.

As you can see, the organization set a goal of 25,000 signatures. The results? A total of 75,000 signatures — and e-mail addresses — in three weeks, about half of them new to the organization! That's a resounding success, by any measure.

But, alas, what if yours isn't an advocacy-based organization with national name recognition? What are you to do? There is no denying you'll have a harder time, but it's still possible to use this approach.

You might borrow this tactic used by a think tank. To build their list, the group created a petition on campaign finance reform (a subject of one of their forthcoming reports). The petition, which was posted on the organization's website, contained only a few sentences. Very simply, it said: "I support campaign finance reform" and why.

The think tank first sent the petition via e-mail to their board and staff and then to their small list of donors and friends. Recipients were asked to add their names to an online petition, to be displayed during the press launch of the campaign finance report.

More important, recipients were urged to forward the petition to friends — thereby garnering new names for the organization's list. Petition signers were told that the petition was to indicate support for their cause rather than to be sent to a legislator or used for a political purpose, yet it generated a strong response.

This method can be adapted for your type of organization. A museum might use a petition to support bringing a particular exhibit to town. A university could gather names of people who support the school's diversity goals.

A FEW MORE LIST-BUILDING TIPS

"Tell-a-Friend"

The phrase "Tell-a-Friend" is quickly becoming overused in e-mail messaging — so much so that I'm afraid your recipients don't really see it anymore. We've found it's far more effective to give your members specific things to tell their friends.

Here's the difference:

- Example 1 — Tell a Friend
- Example 2 — Please tell a friend about how we're helping Ugandan orphans. Every person who joins in our efforts to find homes and provide desperately needed medical care makes a difference. It will only take you a moment to change a child's life.

It's equally important to make it easy for friends to tell their friends. To illustrate:

- A client organization launched a petition campaign to half of their list (randomly selected). About 4,000 people signed the petition. Of these, 15 percent (or 600 signers in total) were new. They had been attracted as a result of existing members telling them about the organization.

- The organization then e-mailed the remaining half of their list. About 3,500 people signed the petition this time, but only three percent (or 100 signers) were new.

What was the difference? In the first campaign, once the visitor had signed the petition, she was automatically whisked to a page allowing her to "tell-a-friend."

In the second campaign the visitor, after signing the petition, was automatically taken to a thank you page that contained only a link to the tell-a-friend page. Thus, by making the visitor click to another page instead of combining the thank you message with the tell-a-friend page, the number of visitors who told a friend decreased dramatically.

"Viral" Campaigns

Much of what I described here is "viral" — like a cold, it gets spread from person to person. I sign a petition and then ask my office mate to do the same. She sends it to her brother, and he sends to his book group. And on and on. It means that what you've done has not only spread to your current list members, it has filtered out and encouraged new people to get involved. Needless to say, you want your list-building activities to be viral!

Tracking Sources

One last and important reminder: be sure to "source code" all of the names you gather. Then, for example, if you find that your best performing names are those that came in through tell-a-friend messages… well, you know what to do — more "tell-a-friend" drives.

Tracking also allows you to follow up on an issue for which a group of new names were drawn in.

COMPOSE YOURSELF!

As far as e-mail copy is concerned, there are two key writing components. The first is the subject line; the second is the body of the e-mail itself. Since readers encounter the subject line first, let's begin there.

The Scoop on Subject Lines

Talk about time being of the essence! To capture your constituents' attention and convince them that of the many e-mails bombarding their in-box, yours is the one they must read, you have a grand total of… one or two seconds! With that in mind, let's address a few subject line fundamentals.

- ***Length.*** E-mail programs vary as to how many characters the recipient will see. Be on the safe side and limit your subject line to 50 characters.
- Shouting symbols ($, !, CAPS, *) and words such as Free, Sale, Teens, will land you in the spam filter. Avoid them. Stay up to date on words to avoid by reading articles on the topic at: www.emailsherpa.com or www.clickz.com.

TEASE, TELL, OR TAKE ACTION?

Depending on the situation, you'll speak in different voices with your subject line. For example, if your issue is timely and your relationship with the donor is well-established, your job may simply be to "tell" him or her what is happening. Here's what I mean:

- ***A crisis occurs overseas and a relief agency delivers an e-mail letting donors know how they can help:*** "Send a blanket to Bamgarian flood victims."
- ***The e-mail that helps your users take care of business:*** "Order your Golf Gala tickets now," or "Your membership expires soon — renew today."
- ***The content is time-sensitive:*** "Six vegan-friendly Easter decorations," delivered a few days before the holiday.

However, you won't always have opportunities to "tell" your readers the facts. Here's when a little "teasing" is needed to get your reader's attention, two examples:

- ***A provocative subject line: "The movie President Bush doesn't want you to see."*** That approach works for me… I want to find out just what that movie is.
- ***A clever subject that's quick and easy-to-scan:*** "It's beginning to look a lot like justice..." sent just before the Christmas holidays by Earthjustice.

Finally, whether you're telling or teasing, it's always important to use your subject line to call your readers to action. After all, nothing happens (sending you a donation, filling out a petition) until they take the next step. The best "take action" e-mails are:

- ***Specific.*** Rather than exhort readers to "Tell them no," say instead: "Tell Big Tobacco to stop selling to children."
- ***Well-timed.*** Ideally, the topic is in the news.
- ***Local, if possible.*** "Tell Big Tobacco to stop selling to Boston children."

Once you've motivated your constituents to open your e-mails, it's critical to give them something good to read.

Composing an effective e-mail — Four elements

Writing good e-mails starts with the basics of writing good copy, period. You must have a story to tell, offer a compelling reason to give, and use clear and persuasive language. Only a few key elements distinguish e-mail copy from other forms of writing:

1. Make your e-mail scannable. How do you read your own e-mail? Do you pore over every word? Of course not. Neither do your constituents. If you're like most people, you tend to scan rather than read your messages. Therefore make sure your message is "scannable." That means:

- Short sentences and short paragraphs
- Numerous links to your donation page
- Graphic insets telling your reader what to do

- Bullets
- Selective use of bold and italics (reserve underlining for hyperlinks only)

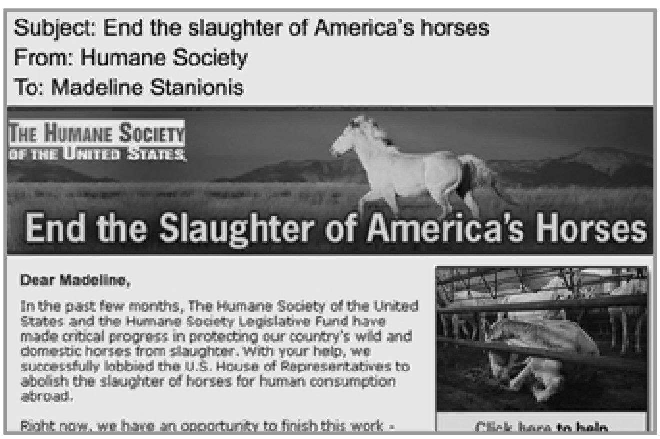
Using these guidelines, your goal is to create a compelling message that, in seven seconds or so, tells your constituent exactly what to do.

2. Keep it simple and short. In a direct mail fundraising letter, you have pages (sometimes as many as eight!) to let your story unfold. Not so with e-mail!

Chances are good your constituents are a little overwhelmed by the volume of e-mail they receive, and a windy e-mail from you will only add to the deluge. Keeping your message short and to the point is a service to your recipients. That means:

- Presenting only one or two key points
- Using as few words a possible to state your case
- Avoiding the history of your appeal (this is no time for background info)

3. Be aware of "preview panes." Many readers won't get past the part of your e-mail visible in their preview panes. Here's an e-mail I received from The Humane Society:



Note how the issue and the ask are prominent in the first few sentences. You needn't read any further to grasp the point of this e-mail.

That first impression is critical to your success. Treat those top few inches of copy and design as precious real estate. Tell your whole story right there.

4. Keep the medium in mind. E-mail tends to be more casual than print. That means a more personal, less formal tone is appropriate and even expected. For example:

- Salutations and closings are typically more relaxed. A letter might begin with "Dear Ms. Stanionis," while an e-mail would start with "Hello Madeline."
- E-mail copywriters tend to use more colloquial terms. Direct mail copy might say "We were truly overwhelmed by the generous response to our request." In e-mail, that translates to, "Wow! You overwhelmed us (and that's hard to do)!"
- An up-to-the-minute style of writing is also appropriate. In direct mail language: "It was lovely to celebrate our anniversary with you last month." In e-mail: "I'm writing this at midnight, just getting home after the anniversary party. Whew! What a night."

Finally, a sure way to become e-mail proficient (and prolific) is to observe your own habits. Which messages earn your readership? How are you reading them? Pay close attention and I think you'll be surprised at what you learn.

I've highlighted here the key ways in which writing e-mail is different from other forms of writing. Still, good writing is good writing: specific, clear, and forceful. E-mail hasn't changed that a bit! GFJ

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