

Contents

VOLUME 25 / NUMBER 4 ■ JULY / AUGUST 2006

Reclaiming Our Social Justice Organizations

4

Anne Tapp

When a battered women's shelter changed its focus from service to social justice, it also transformed its board, staff, and fundraising. Tapp discusses the rationale and process of embracing a broader social justice agenda.

Ethics and Fundraising

9

Kim Klein

What does it mean to act ethically in fundraising? Kim explores the easy — and the not-so-easy — paths.

The Quality of Life Benefit

12

As a supplement to health insurance and retirement planning, a Quality of Life Benefit that rewards employees for taking care of themselves can show your staff you care about their good health.

Book Review — Promising Practices in Revenue Generation for Community Organizing

14

Reviewed by Joan Flanagan

Grants or community fundraising? A new report from the Center for Community Change says “both” and provides a useful look at fundraising for community organizations: best practices now, promising practices for the future, and strategies for increasing the number and sources of grants.



On Our Cover • MEMBERS OF THE STAFF LEADERSHIP TEAM OF SAFEHOUSE PROGRESSIVE ALLIANCE FOR NONVIOLENCE (SPAN) IN FRONT OF THEIR BUILDING IN BOULDER, COLORADO. FROM LEFT TO RIGHT, TSUNEMI MAEHARA ROONEY, YOLANDA ARREDONDO, ANNE TAPP, LISA OLCESE, AND LISA CALDERÓN. SEE ARTICLE ABOUT THEIR TRANSFORMATION, STARTING ON PAGE 4.

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LETTER FROM THE PUBLISHER

KIM KLEIN



As you know if you have been following this page in the *Journal*, we are getting a lot of amileage out of our 25th Anniversary! Our celebrations began this year with a special issue and will culminate in the conference we are sponsoring on August 4 and 5 in Berkeley, called Rai\$ing Change: A Social Justice Fundraising Conference (now sold out) and the celebratory party Friday evening, August 4 (still room — get your ticket now!).

The final celebration of the 25th Anniversary for me is handing over Grassroots Fundraising to new leadership. Grassroots Fundraising is now much bigger than the *Journal*, although that will always be the flagship. We continue to expand our website and our e-newsletter; we are in the second year of the “Fundraising Academy for Communities of Color,” which is an intensive fundraising training program cosponsored by CompassPoint Nonprofit Services and focuses on organizations working in and with Latino, Asian, and African American communities; we are continuing our exploration of new models and new ways of thinking about boards and staff; and we are beginning a series of webinars, exploring e-learning, and much more.

Surprisingly, no one has ever worked for Grassroots Fundraising full time, and we have decided that the scope of our work now requires that kind of attention. We are thrilled that Priscilla Hung has agreed to join us full time in a leadership capacity starting July 17. Her position is so new it doesn't even have a name yet. Priscilla is a graduate of the Grassroots Institute for Fundraising Training's Intern program, and she was the Development Director at the DataCenter for several years. She has spent the last two years in China and returns to the Bay Area to shepherd us through this transition and to help us manage our expanding work. There will be more about Priscilla in the next issue.

I will continue to write for the *Journal* and for the e-newsletter, and to give advice when called on (and hopefully not otherwise!). I will continue my consulting and training practice and will conduct webinars, but I will also focus much more effort on my work with the Building Movement Project (www.buildingmovement.org). Stephanie Roth remains our editor and rock of stability, and so from the point of view of readers, there will be little or no change.

Speaking of change, this issue features an article by Anne Tapp, the Executive Director of Safehouse Progressive Alliance for Nonviolence (SPAN) in my hometown of Boulder, Colorado, called “Reclaiming Our Social Justice Organizations” about how one organization made major changes in the way it operates. It provides a real-life example of a thread we have followed in the *Journal*, about how social justice must be the driver of any progressive organization. My article in this issue explores the grayer areas of ethics and fundraising, and we present a way to support employees called “Quality of Life Benefits” developed by Training Resources for the Environmental Community (TREC), which we encourage every organization to adopt as best they can. Finally, Joan Flanagan reviews a short and very helpful publication called *Promising Practices in Revenue Generation for Community Organizing*, published by the Center for Community Change.

I wish everyone a wonderful rest of the summer and a fond farewell! I'll see you in my new incarnations.

RECLAIMING our SOCIAL JUSTICE organizations



*“We seek not rest but transformation.
We are dancing through each other as doorways.”*

— MARGE PIERCY

*“The hottest places in hell are reserved for those who,
in times of great moral crisis, maintain their neutrality.”*

— DANTE

At a time when social injustice seems as rampant as ever, there are no two more appropriate quotes than these to remind us of the flow and urgency of change. The “transformation” that Marge Piercy describes is relational: we need each other, we inspire change in each other, and we provide doorways for each other. Dante, on the other hand, is abruptly candid: remaining neutral when injustice demands action is unforgivable. Martin Luther King would echo Dante more than six hundred years later when he declared “[The] tragedy in this great period of social transition is not the glaring noisiness of the bad people, but the appalling silence of the good people.”

Nonprofit organizations are at a crossroads. We are increasingly asked to fill the gaps created by cuts in government services, to respond to those left in the ruins of ill-conceived public policy, and to do so without additional funding support or political influence. The current anti-immigrant rhetoric and racist initiatives to deny undocumented immigrants access to even basic emergency services will inevitably confront nonprofit organizations with the prospect of denying assistance to community members who have, by virtue of their immigration status, been determined unworthy and contemptible.

Whether nonprofits are willing and prepared to respond in this time of “great moral crisis” has everything to do with how we understand and define the social justice nature of our organizations. This is the story of one organization’s reclamation of its social justice roots.

ORGANIZATIONAL TRANSFORMATION

In August 2004, the domestic violence organization I have had the incredible fortune of being involved with for the past 15 years proudly and publicly reclaimed its social justice roots. After 25 years of serving the community, Boulder County Safehouse announced a new name and an expanded social justice agenda. Safehouse Progressive Alliance for Nonviolence (SPAN) would carry its vision of a just and equitable world for women and their families into the future. SPAN affirmed its mission as a human rights organization committed to ending violence against women, youth and children through support, advocacy, education and community organizing. Promoting economic, racial, and social justice would be the focus, an equal balance of direct services and social impact projects would be the method.

The transformation of Boulder County Safehouse into SPAN was a several-year process, involving countless discussions, exploration and inquires, jittery starts and stops, conflict and confrontation, hurt feelings, inspired ideas, risks and recoil, and finally, a well-calculated leap of faith. The August 2004 announcement of our name change and expanded mission was the public unveiling of efforts that had already begun to show extraordinary results. Two years prior to the public announcement, the organization looked and functioned like many battered women’s programs: a predominantly white staff provided shelter and counseling services to a client base of 40 percent people of color; advocacy services centered on the criminal

legal system; prevention efforts focused on “family violence”; and the agency’s referral network depended on mainstream human services organizations and government systems (child welfare, family court, TANF, etc.). Fundraising to support these services was the responsibility of a designated few — primarily the executive director, development director and board of directors.

By mid-2004, the face and focus of SPAN looked quite different. Fifty percent of the staff, 50 percent of the leadership/management team, and 40 percent of the board represented communities of color, reflecting the demographics of those served by SPAN. Programs had been reorganized in response to client needs. Client-defined advocacy, which often challenged status quo collaborations, was the norm. Prevention efforts were broadly focused to include race and gender-based violence. Primary alliances and partnerships were with community-based, social justice, antiracist organizations and groups. New models of fundraising were introduced to lessen the gap between “raising money” and advocating for social change. SPAN’s transformation was being realized.

In the two years since the 2004 public unveiling of the transformed SPAN, the organization’s social justice focus has matured, deepened, and informed every aspect of our work. An unanticipated benefit has been an increased level of staff continuity and longevity. Prior to 2004, the SPAN staff of 30 experienced an annual turn-over rate of 35 percent, resulting in costly and time-consuming recruitment, hiring, and training processes. Today, the annual turnover rate is less than 15 percent. Defining one’s work in terms of activism and justice — on both an individual and social level — can guard against the burnout and cynicism that are often the demise of “service providers.” (Of course, there are plenty of stresses that keep many social justice activists on the edge; but believing in one’s efficacy to create lasting personal and social change helps make that edge a bit less jagged and steep.)

WHY BOTHER?

The impetus behind SPAN’s transformation was multifaceted. But most compelling was the realization that the organization had settled into a routine that prioritized “services” over social justice and failed to integrate a race and class analysis into our work. We asked ourselves, “Are we really making a difference? If so, to whom? If not, why not and how can we change?”

The transformation of SPAN also occurred within the context of a movement increasingly scrutinized for its reliance on the criminal legal system and questioned for

its relevance and accessibility to diverse communities. Like many social justice movements before and since, the Women’s Anti-Violence Movement was born of inspiration and tamed by institutionalization. Since the birth of the movement more than three decades ago, hundreds of battered women’s shelters and rape crisis centers have been established across the country. Unquestionably, countless lives have been saved and individuals helped as a result of these programs and services. However, hundreds of thousands of women continue to be physically and sexually assaulted each year and tens of thousands go unnoticed and unserved by the very organizations established to help them.

This is particularly true for women of color and

poor women who, despite these services, continue to experience intimate partner violence at rates nearly three times greater than do white, middle-class women.

How is it that a movement that began with such determination and passion has become a network of agencies whose services are questionably relevant to those who need them most? The answers, and there are many, have little to do with the dedication of staff and volunteers in domestic violence and sexual assault programs. This is not a problem of commitment. Rather, it is the predictable consequence of a social justice movement’s slide from activism to service-delivery.

FROM ACTIVISM AND MOBILIZATION TO PRAGMATISM AND INSTITUTIONALIZATION

Most social justice movements — and the organizations that emerge from them — have a predictable life cycle. First is the activism and mobilization stage, during which impassioned activists expose the identified injustice and champion social change. Solutions are broadly stated and sound great at rallies and on bumper stickers: “End Patriarchy!” “Wage Peace!” “E-Racism!” “Every Home a Safe Home!” “No Means No!” The careers of countless social workers and political science majors have been inspired by the “activism and mobilization” stage of social justice movements.

Next is the stage of pragmatism. The onset of this stage is typically marked by a no-nonsense activist who, after a rousing speech by the charismatic leader, asks “Seriously, what are we going to do about this?” Organizations are established and programs are developed to serve the needs of those affected by the injustice. Putting vision into practice is the focus and challenge of this stage; institutionalizing the movement is typically the outcome.

It is during the transition from “activism and mobilization” to “pragmatism and institutionalization” that

Like many social justice movements before and since, the Women’s Anti-Violence Movement was born of inspiration and tamed by institutionalization.

fundraising strategies, and those charged with implementing them, grow increasingly formal, professionalized, and disconnected from the grassroots origins of the movement. It's one thing to organize a car wash or bake sale to raise a few thousand dollars; it's something entirely different to write and manage a hundred-thousand-dollar federal grant. Or so we've come to believe.

A strange haze tends to engulf social change activists during a movement's transition to the stage of pragmatism. The same people who can organize seemingly disinterested communities in response to injustice, who are unfazed by hostile crowds and personal attacks, who commit their very breath to the struggle for justice, can crumble at the thought of fundraising. Of course, this has less to do with the actual mechanics of fundraising (a skill most of us learn as young children instructed to sell Girl Scout Cookies, Easter Seal stamps, school calendars, and the like), and more to do with beliefs about the nature of money, who has it, how to ask for it, and who controls it. Rational or not, conscious or not, our unexamined beliefs about money can undermine the grassroots strength of social justice movements.

"Activism and mobilization" and "pragmatism and institutionalization" are necessary stages of a social movement's development. They are neither good nor bad; they are simply predictable. What becomes problematic in the transition between stages is the tilting away from social change — the impulse that inspired the movement — toward an uncritical embrace of programs and services that may meet some individuals' immediate needs but fails to address sustainable, far-reaching change. Balancing direct service with social impact is the key. Unfortunately, the symptoms of imbalance are evident in most social justice movements. Whether the Women's Anti-Violence Movement, the HIV/AIDS Movement, the Homeless Prevention Movement, the Environmental Movement, the Peace Movement, or the Gay/Lesbian/Bisexual/Transgender (aka, Queer) Movement, the challenges are the same. The evolution toward meaningful and sustainable social change requires that we take a boldly honest look at the fundamental problems of our social justice movements.

THE BREAKDOWN OF SOCIAL JUSTICE

Our movements are too white. With the exception of movements and organizations that specifically address racism, the visible leadership of most social justice movements are white, traditionally educated, well-intentioned

liberal folks like me. Despite the fact that most social injustices disproportionately affect communities of color, organizations addressing these issues have systematically, albeit unconsciously (through unexamined white privilege), excluded people of color from leadership.

Coloring-up social justice organizations through "diversity trainings" and "diversity recruitment efforts" has been, not surprisingly, woefully unsuccessful. Creating effective, multiracial, antiracist organizations and movements requires a level of personal and organizational commitment

that is too often and too easily dismissed as a "distraction from the real work." Implied here, of course, is that the needs, issues, voices, and leadership of people of color are secondary (at best) to "the real work" of our movements and organizations.

Our movements are too conciliatory. We have confused collaboration with coop-

eration, often sacrificing broader social justice goals to settle on conflict-avoidant middle-of-the-road solutions. Like the awkward tension that often engulfs family holiday gatherings (particularly those during election years), we learn what not to talk about for fear of the conflict and discord that may result from an honest airing of differences.

"Collaboration" has become the mantra of funders and communities tired of — or maybe just confused by — the plethora of seemingly disjointed nonprofits vying for limited funds and a chance in the spotlight. In response, we have signed letters of support and Memorandums of Understanding to appease funders without critical discussions of how these partnerships may or may not serve our constituents or our social justice agenda. Any effective collaboration requires not only agreeing on our shared values but clearly defining where our goals diverge or even collide.

Similarly, our public policy agendas have become too conciliatory, driven by "what can get passed" rather than "what is really needed." This is not to say that strategy, timing and patience aren't fundamental ingredients to social change; clearly, they are. But too easily our vision for equity and justice has been blurred by the logistics of getting there, mistaking diminutive steps for true progress.

Our movements are too disconnected and too service-based. When grassroots organizations grow out of social justice movements, the trajectory toward specialization seems unavoidable. A problem is defined (such as intimate partner violence against women); a program or service is proposed to address the problem (battered women's shelters); and first volunteers then professional staff are engaged to run the program. As services expand, greater

The same people who can organize seemingly disinterested communities in response to injustice, who are unfazed by hostile crowds and personal attacks, who commit their very breath to the struggle for justice, can crumble at the thought of fundraising.

expertise is required within the organization to secure resources and support and manage growth. Over time, the organization institutionalizes its services through protocol and standard, and if all goes well, reinforces its place in the community as the “expert” in its identified service area.

While this trajectory toward specialization allows for focused programs and services to address a specific community need, it comes with a cost. Disconnected, service-based organizations oversimplify the complex nature of people’s lives by encouraging a single-issue approach to injustice. Providing a battered woman and her children with shelter responds to their immediate basic need for safety, but it does nothing to address the economic inequities that keep her reliant on her partner’s income for survival and vulnerable to his future abuse. A battered women’s shelter is no more the solution to gender-based violence than a hospital emergency room is the solution to heart disease. It is a necessary resource, not a fundamental answer. Without equal investment in addressing the roots of an injustice, we inadvertently confuse the quantifiable task of serving clients with the immeasurable charge of preventing injustice.

Our movements’ fundraising strategies are too disconnected from our social change efforts. The expansion of the nonprofit sector in the past decade or more has sprouted a “fundraising industry,” replete with (mostly white) fundraising experts and professionals. While this industry has enhanced the ability of some nonprofits to compete for economic survival and has introduced innovative and entrepreneurial strategies to the world of nonprofit fundraising, it has also served to disconnect raising money from creating change. This divergence undermines the very essence of grassroots social change by placing the resources for creating change in the hands of a select few. In this scenario, those who know how to play the fundraising game, who represent the organization’s public face, who interpret (and tame) the organization’s social change message to mainstream funders, are rarely the same people who “do the social justice work” of the organization. At some point, the strain of this disconnect will unravel an organization.

Fundraising for social change requires a stern commitment and a strong stomach. Too many organizations are tempted to sacrifice urgent social change work that may be controversial or unpopular (like pro-immigrant and antiracist initiatives) if it risks offending a major funder or funding source. And many funders, particularly government departments and mainstream foundations, expect nonprofits to de-politicize their work (or at least how they

describe their work in grant proposals) to keep the funder’s funder (trustees, politicians) happy.

SEEKING TRANSFORMATION

So, where do we go from here? How to we begin this transformation? First, let’s deal with the racism in our organizations and movements and stop behaving as if doing so is inconvenient to “the real work.” Our national legacy of colonization, racism, and white supremacy, combined with the changing demographics of our country and the fact that the injustices we work to end disproportionately affect people of color, should leave no room for hesitation or squeamishness. Racism is alive and well in our white-led social justice movements. Let’s confront it through honest conversations about power and privilege that demand accountability, not euphemistic trainings on “difference and tolerance” that leave people of color tokenized and subject to white folks’ paternalism.

Second, let’s build genuine alliances and partnerships that promote real change, rather than settle for “collaborations” that are little more than self-serving referral networks. Let’s agree that unabashed truthfulness about our differences as well as our shared goals should frame every alliance. I am a proponent of complex, even ironic partnerships (SPAN’s alliance with a local evangelical church is such an example), but they must be founded on honesty and candor, leaving no room for surprise or personal affront when we vehemently disagree.

Along these lines, let’s bring this same level of frankness into our relationships with funders and supporters. Let’s ensure that those investing in “our work”

Let’s push funders to get as comfortable with social impact outcomes that may take a generation to manifest as they are measuring individuals served annually in a program.

understand that this work includes not just a service but a social change objective. Let’s push funders to get as comfortable with social impact outcomes that may take a generation to manifest as they are measuring individuals served annually in a program.

Finally, let’s broaden our thinking and integrate our strategies regarding social justice. Our organizations, public policy agendas, and social change efforts must work with not against each other. “Oppression Olympics” (to borrow from a brilliant colleague), setting “my injustice” against “your injustice,” is a waste of our time and passion. Let’s stop doing it. Breaking through the isolation and disconnection of social justice movements affords us room to create more meaningful solutions to multifaceted social issues.

Coming full circle to SPAN: We’ve learned invaluable lessons and made some painful mistakes in the process of our organization’s transformation. Here are few lessons to share with others embarking on a similar journey:

Expect conflict — it means people are paying attention. Be prepared for conflicts within the organization as staff, board and volunteers question their place in a changing structure as well as conflicts with other organizations unsure what this shift means to them. Some of the most painful and surprising conflicts we experienced were with white-led, liberal organizations and activists who felt threatened and judged by our social justice, antiracist efforts. Which brings us to the next lesson...

Maintain humility — it makes it easier to live through mistakes. Transformation is a messy process; approaching it with humility and openness allows for more genuine and lasting change. At the same time, don't confuse humility with acquiescence. Failing to vehemently speak out against injustice because of a concern that we'll look righteous isn't humble, it's cowardice.

Acknowledge fundraising anxiety — it helps keep paranoid fantasies in check. SPAN has a long history of diversified funding and fundraising, which made it easier to tolerate the possibility of losing the support of conservative or mainstream donors while building support from funders and community members inspired by our expanded social justice agenda. We have experienced very few instances of individual or institutional funders pulling their support because of the organization's expanded social justice work and many more instances of gaining support from donors interested in investing in social change. Ironically, the primary concern raised by other organizations reluctant to speak openly about social justice issues is fear of losing funding.

Communicate frequently — it reduces conjecture and helps people relate to the changing organization. Being clear and direct about changes in the organization and the rationale behind those changes provides an open invitation for the community to become part of the organization's social justice efforts.

Implement necessary structural changes — it removes operational barriers to change. A critical assessment of formal and informal organizational culture is needed to identify barriers to organizational inclusivity, particularly for people of color. In addition, structural shifts are also necessary to establish and integrate new fundraising roles and strategies. SPAN is exploring new ways of fundraising to augment current efforts. We have introduced "community fundraising support" into each staff member's job responsibilities, with the focus on linking staff's community activism with raising funds. We have also developed and marketed a two-day "Building a Multi-Racial Anti-Racist Organization" training, which now accounts for \$25,000 in annual earned income.

In championing these efforts to reclaim our social justice organizations, I have no illusions about the personal and professional challenges faced and the toll taken when embarking on this journey. Being part of the transformation of SPAN has been both the most enriching and the most agonizing experience of my career. It is also an ongoing transformation, and over time I expect we will be tempted by habit, limited resources, or simple exhaustion to narrow our gaze and lose sight of the breadth of our vision. I trust, however, that our gaze will never narrow, not because of mere grit and determination, but because of the remarkable board, staff, volunteers, clients, and community of SPAN that bravely declared they would never remain neutral amidst injustice and instead danced through a doorway together, never to turn back. **GF**

ANNE TAPP IS EXECUTIVE DIRECTOR FOR SAFEHOUSE PROGRESSIVE ALLIANCE FOR NONVIOLENCE IN BOULDER, CO. SHE CAN BE REACHED AT ANNE@SAFEHOUSEALLIANCE.ORG.

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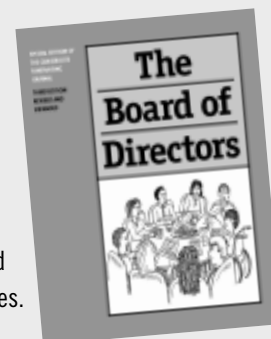
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Ethics

AND FUNDRAISING

BY KIM KLEIN

Whether professional or volunteer, as fundraisers we run up against a number of ethical dilemmas in the course of our work. Ethical issues are often quite straightforward: It is not OK to tell a funder or a donor that you are engaged in a certain kind of program if you are not, no matter how much money that donor might give you if you were. Similarly, it is not a good idea to take on a program area or a piece of work just because someone has or might offer to fund it. This quickly results in mission drift. It is not OK to agree to hire your donor's worthless son-in-law to be your organization's program director or bookkeeper in exchange for a major gift. It is not OK to keep two sets of books — one for the public and a different, truer accounting that remains internal to the organization. Many of these ethical or moral issues are addressed in standard accounting procedures and in the very excellent Association of Fundraising Professionals Code of Ethics, as well as the Donor Bill of Rights, which can be found on their website at www.afpnet.org.

But there is a subset of ethical issues that fall into more of a gray area that are usually the development director's job to navigate. These dilemmas often happen because the right thing to do is not completely clear and because the development director has conflicting loyalties. Let's look at some examples.

1. A think tank with a staff of five people is offered the opportunity to buy their office building from their landlord at a very reasonable price. However, the building will need a great deal of work and the organization has never thought about owning property. The board chair is very enthusiastic about buying the building, but the rest of the board is not, and neither is the ED. They feel the building needs too much work and that owning and rehabbing the building could take staff away from the actual work of the organization. You agree with the ED and also think it is not a good idea to do something that so few people are enthusiastic about. You share your thoughts with the ED. You are, however, surprised when the ED announces to the

board that he has talked to one of your biggest donors, who is in real estate, who has said it is not a good idea for nonprofits to own buildings. You know that no such conversation has taken place. The board chair graciously says she will defer to the donors' knowledge, and the matter is dropped.

2. Your organization receives a grant for \$50,000 and the grant agreement asks you to check a box that reads: "Our organization has taken appropriate steps to ensure that none of our employees or board members support terrorism or are involved in any organization that knowingly or unknowingly supports terrorism." You are faced with two facts: first, that you have not taken any steps in this direction, and second, that the organization feels that this antiterrorism language is unconscionable and that being asked to do so is possibly unconstitutional. You call your program officer who says, "Just check the box — it is all a facade anyway. Obviously, we wouldn't fund you if we thought you were terrorists."

3. The chair of your board introduces you to her elderly aunt, who is interested in your organization's work. On the advice of the board chair, her aunt has decided to offer the lead gift for a program your organization has wanted to launch; moreover, the donor is willing to give this generous amount for three years. You and the board chair are thrilled. As your meeting with this woman is winding up she says, "I just have one question for you: Does your staff go to church regularly?" You do go to church, but your executive director is an atheist, and the two program staff who will run the program are Jewish. One is religious and one is not.

In these examples, there is one easy way out: just let it go. So what if the ED made up a conversation in order to end the discussion about buying the building? That was probably the right decision anyway — certainly it was the one you agreed with. So what if you check the antiterrorism box on the grant agreement? It will just sit in a file anyway. Clearly, the funder doesn't care that much. So what if you make it sound as though your staff are active

in houses of worship? The donor probably won't pursue the question further. On the scale of one to ten, with ten being a big lie, these are all twos and threes.

However, as the saying goes, giving in to any of these "So whats" leads you down a slippery slope. Each of these examples bears a deeper examination to ferret out the ethical and practical complications and to see if there is another approach to these problems.

THREE TOOLS

There are three tools that can help you avoid feeling the need to deceive, demur, or lie in any fundraising situation (and possibly in any situation).

First, follow the Quaker adage, "Assume good intent." That is, assume that people you disagree with may be acting out of positive motivation. Second, follow a main principle of assertiveness training by making only "I" statements. "I felt," "I wonder," and so on. Third, use a "gut check." Does this feel bad or weird? What if this whole story were in the newspaper — would I feel proud of my role in this?

Using these three tools, let's look at the dilemmas in two ways: with good endings and with more difficult endings.

GOOD ENDINGS

First, let's look at how these situations could have easy, good endings.

In the first instance, a gut check says, "This is weird." Deceiving a board member is not a good idea. You need to talk with the executive director about his story. First of all, the board member may well know the donor whose name was invoked and if she runs into him and thanks him for his clarity, your executive director will be found out and your board chair will be embarrassed and hurt.

Second, if the board chair is a good person and good worker, why not see if she understands the fact that a capital campaign cannot succeed without total enthusiasm from everyone?

However, assuming good intent, you ask the executive director why he thought his story was the best way to solve the problem. Regardless of his rationale, you can then use "I" statements to make your position clear. For example, if the executive director explains that he didn't want to hurt the board chair's feelings and is quite certain she doesn't know the donor in question, you could say, "I would rather see if she understands the need for full staff and board support for a big project. Otherwise, something else may come up that she supports and others don't and we'd be in a similar situation."

Here's how such a scenario might play out: the executive director agrees to have a meeting with you and the board chair. He tells the board chair that he exaggerated a

conversation with a donor to avoid hurting her feelings and now feels bad about it. He realizes she is perfectly capable of understanding why pursuing the building did not seem like a good idea to him. You offer support for his position, including telling the chairperson how important she is to the organization and how no one ever wants to dampen someone's enthusiasm. She is understanding and as is her nature, gracious. She does say lightheartedly as the meeting ends, "Don't worry about my feelings in the future. I'm tougher than I look."

In the second instance, the situation is clearer. Your organization is opposed to this antiterrorist language, as, appar-

First, follow the Quaker adage, "Assume good intent."

ently, is the funder. However, the funder seems comfortable with complying with the letter of the law while not pursuing it further. You, the grantee, are asked to deceive in two ways: to check a statement that you don't agree with and to aver that you have complied with something that you have no intention of complying with. You are not going to interrogate staff and board about their affiliations outside of work. That would be no better than checking a box that said, "We make sure that everyone on our board and staff has citizenship papers," or "We make sure that no one on our board and staff has ever had an abortion." Your "gut check" tells you the situation is wrong.

As the development director, it is your job to bring this agreement to the executive director and the board, as they are ultimately responsible for these contracts. If they say "Check it and forget it," then you have a bigger decision to make: can you in good conscience stay in your job.

In this case, however, it doesn't come to that. The organization asks the funder to challenge this language in their own professional associations. They do, and they learn that other organizations have also been unwilling to check the box. As a result, they allow your group to turn in the agreement with that statement crossed out and you become part of a coalition of funders and organizations publicly opposing this kind of screening.

The third example is one in which "assume good intent" is the primary authority for your actions. You have no idea what the donor wants to know when she asks if you and other staff go to church. Perhaps she is just making conversation and in her circle of friends, this is a common question. You would answer, "I am active in First Methodist. And the two people running the new program are Jewish. One goes to Temple Emmanuel and I don't know so much about the other's life. Are you involved in a church?"

You might be surprised when she answers, "I'm an Episcopalian. I think churches and synagogues might be

interested in this program, and some of them might be able to provide some money and volunteers. Perhaps one of the program people can talk to my churchwomen's group and to their own religious groups once the program is up and running."

MORE DIFFICULT ENDINGS

Of course, all three of these situations could have gone another way. Let's look at how we might work with more difficult endings.

In the first circumstance, the executive director becomes quite defensive when you discuss his fabrication and refuses to talk to the board chair about it. He says that he has made up things before in order to "get things done" and that you need to be more practical. Your dilemma now moves to a different level: Do you want to work with someone who you know will make up stories (possibly to you) in order to get his own way? This would not be an easy decision, particularly if you like the organization or if jobs are hard to come by. But over time, the price of supporting someone who regularly exaggerates may be too great.

Many people equate disagreement with disrespect, which makes it impossible to have a discussion in which conflicting viewpoints are aired.

Unfortunately, defensiveness is far too common in our world. Many people equate disagreement with disrespect, which makes it impossible to have a discussion in which conflicting viewpoints are aired. Everything is taken far too personally, and there is a limited ability to separate action from personality. "I disagree with you" is heard as "You are wrong and stupid."

I have worked with many people in leadership who demand the loyalty of a dog to its owner from their staff. They can change, but this usually requires intervention from someone they respect and some training in how to respond nondefensively. Sometimes people (defensively) deny that they are defensive, but they truly may not realize the effect of their tone or body language. Simple changes can make a world of difference.

Other people's insecurity rises out of a fear of being punished. "I disagree with you" becomes, "You are a bad worker." We have a joke at my office about some people that their middle name is "It-is-not-my-fault." Making sure you give credit and praise more often than criticism goes a long way to helping the person trust you enough to be able to hear disagreement.

Finally, of course, our culture is conflict-averse. When we read about things people are terrified to do, such as

public speaking or asking for money, I sometimes think that at the top of that list would be starting a conversation that might lead to conflict. Some organizations are doing in-house trainings on conflict and conflict resolution in order to strengthen their ability to be in creative dialog with each other and to surface disagreements early before they fester and become huge explosions.

None of the manifestations of defensiveness are good leadership qualities; of course, all of us feel defensive from time to time. Thinking about what makes you feel on the defense and what helps you to let go of that defensiveness will help in dealing with others. People who want to be effective leaders are always working on not taking things personally.

From an ethical point of view, understanding the reasons that someone behaves unethically can lead to compassion and may provide a way out of the dilemma, but it cannot be the reason you do not confront unethical behavior.

In the second situation, the funder says that if you don't check the box and stop making a big deal out of it, they will be unable to make the grant. Here again, the situation is clearer. Find out more about what the law says and stay in a negotiating posture with your funder. Generally, funders do not like to pull grants any more than organizations like to give up the money.

In the third case, the donor says she prefers organizations where all the staff is involved in a church. Invite her to meet all the staff and hear from them personally before she makes a final decision. If this donor demands that people be active, churchgoing Christians in order to make her gift, you must politely decline her offer.

By continuing to negotiate in any situation, you stay in a place of integrity but not self-righteousness. Having been in many serious moral and ethical quandaries with regard to fundraising, I have always felt best, and felt that the best outcome resulted, when I told the truth — that is, what was true for me — without insisting this was the only or even necessarily the complete truth. Offering options and asking to stay in conversation usually resolved the problem amicably.

As you can see, some of your willingness and ability to operate completely ethically will come out of having a diversity of funding sources so that no one person or source is so important to you that you are even tempted to give up your values for money.

It is also true that some things can't be resolved. Then the question is, What is the price of your own integrity? **GFJ**

KIM KLEIN IS THE PUBLISHER OF THE GRASSROOTS FUNDRAISING JOURNAL.

Supporting Employee Wellness: *A Quality of Life Benefit*

In response to hard economic times, many nonprofit organizations have been cutting back on benefits. In a recent survey of about 100 environmental organizations, TREC (Training Resources for the Environmental Community) found that staff working in organizations with budgets of less than \$500,000 often did not receive fully paid health insurance or retirement benefits. Although we understand how expensive such benefits have become in recent years, we believe it is crucial for groups of all sizes to provide at least health insurance to all of their employees and to institute retirement funds if at all possible. Benefits like these make it possible to reduce turnover in nonprofits, where people are often working long hours at rates of pay that are not comparable to what they would be earning in either the government or private business sector.

In addition to insurance and retirement benefits, another type of benefit, which some are calling a Quality of Life Benefit, has been appearing. Although it doesn't take the place of medical insurance and retirement plans, it can, for a smaller cost, help employees maintain or enhance their well-being and resilience. A Quality of Life Benefit rewards staff for taking good care of themselves and asks each person to reflect on how he or she might benefit from exercise, massage, a class, or anything that reduces stress and may increase wellness.

The sample Quality of Life Benefit described here — and implemented by TREC — is an example of such a benefit. The organization reimburses staff for participation in whatever activities the staff person chooses in the line of stress reduction or just plain fun, up to a certain amount each month. That amount becomes taxable income to the employee. **GFJ**

Quality of Life (QOL) Benefit

Effective January 1, 2006, we will offer eligible employees (.75 FTE or greater) a Quality of Life benefit.

PURPOSE: The goal of this benefit is to encourage employee well being. Realizing that good mental and physical health contribute to resilience and productivity, we will provide a monthly stipend toward this goal. By using this resource, it is hoped that employees will engage in regular self-care.

IMPLEMENTATION: This program is receipt-driven. Submit receipts with a QOL Reimbursement Request Form to the personnel office. Once approved, payroll will be notified to include the amount (up to \$100 per month) in that employee's next paycheck. *This income is taxable.*

Whereas we encourage monthly activity to enhance wellness, submissions for accumulated earned benefit will be accepted. (For example, at the end of three months of earned benefit, an employee may submit a receipt for a piece of exercise equipment costing the \$300 accumulated benefit.)

This benefit runs within our fiscal year; expenses cannot be carried over to another year. Our fiscal year ends December 31, and submissions for a year will be accepted until January 15.

EXAMPLES: *Health-related activity* may include individual sessions, classes or programs (exercise, yoga, tai chi, health club membership, meditation, massage, acupuncture, stress reduction programs, weight loss programs, etc.) or equipment; *Recreational activity and equipment* (sport equipment, lessons, outings, etc.); *Other costs related to healthy activity and stress reduction* (travel, supplies, etc.) (For example, overnight accommodations while attending a yoga retreat.)

APPROVAL PROCESS: Any questions, or for prior approval for a request for funds under this benefit, please contact the personnel office. (See next page for reimbursement form.)

Quality of Life Reimbursement Request Form

The Quality of Life benefit is designed to support your health and resiliency. Thanks for taking such good care of yourself. Our organization, our clients and the planet need you long-term.

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Please check time period for this request:

- 1st Quarter (January–March) 2nd Quarter (April–June)
 3rd Quarter (July–September) 4th Quarter (October–December)

Please attach documentation/receipts for your submissions.

	DATE OF EXPENSE	TYPE OF ACTIVITY	DOLLAR AMOUNT
1			
2			
3			
4			
5			
			TOTAL: _____

Rationale: Please write a brief statement of your reimbursement request and how you see this contributing to the quality of your life. _____

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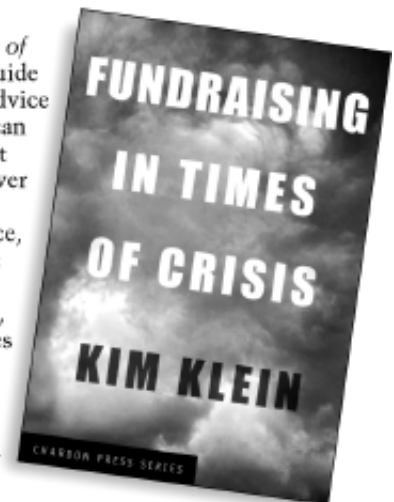
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BOOK REVIEW

Promising Practices in Revenue Generation for Community Organizing:

An Exploration of Current and Emerging Fundraising and Grantmaking Practices in Community Organizing

BY SANDY O'DONNELL, PHD,
JANE BECKETT, AND JEAN RUDD

A PROJECT OF THE CENTER
FOR COMMUNITY CHANGE
WASHINGTON, DC

October 2005

Promising Practices in Revenue Generation for Community Organizing

A Report by Sandy O'Donnell, PhD, Jane Beckett,
and Jean Rudd: Center for Community Change

REVIEWED BY JOAN FLANAGAN

For years, community organizers and their funders have debated two opposing ideas in the trade press and conference watering holes. The first guy says community organizations are too reliant on grants, shifting decision-making from local leaders to downtown funders, rewarding relationships more than results, and putting a chill on more aggressive organizing.

The second guy says that community organizing should get *more* grants, because, dollar for dollar, they produce the best results on the most serious problems in the toughest neighborhoods. Plus they build democracy at the same time that they win on issues.

So, who is right?

For the first time there is a serious, two-year study that gets beyond the barroom bluster to reveal what is really working, and not working, and might work in the near future, for raising funds for community organizing. The three authors, Jane Beckett, Sandra O'Donnell, and Jean Rudd share 75 years as foundation CEOs; labor, political, and community organizers; and leading scholars of sustainability issues. These three women, and their research assistant Katie Clausen, had the street creds to get *all* of the organizing networks and many successful independent groups to share what works for raising money for community organizing. What they learned is presented in a very readable 125-page report, with enough tips and samples to help fundraisers, enough war stories to interest organizers and funders, and enough charts and an excellent annotated bibliography to dazzle the academics.

Regardless of the organizing network, age, or size of the group, region, resource mix, or fundraising methodology, what made the successful fundraisers succeed is

what they did *first*. Jane Beckett writes, "Organizations that raise money effectively [say] attitudes, structures, skills and resources had to be in place in their organizations ahead of time in order for their fundraising programs and techniques to be so successful." It will be no surprise to *Grassroots Fundraising Journal* readers that she observes, "What stops community organizations from being more effective at fundraising was not insufficient time, it was their failure to see fundraising as organizing and relationship building."

As one example, Ken Galston, Executive Director of the InterValley Project, said the keys to good fundraising were "good base, good leaders, wins on fresh issues." That's the key to good organizing, too.

Promising Practices reveals not only that good fundraising is good organizing, but that good fundraising requires good organization. As a former office manager, I was not surprised to see that the most frequently identified practical challenge to improve fundraising is "administrative efficiency." Just as nurses would rather work with patients than write the charts, most organizers have great people skills and dismal data skills. They have donor and prospect information in every pocket, drawer, and vehicle that they own, all of which would turn to gold if they only had a good system, more discipline, or a designated person to make it all usable.

And the answer to the grants paradox? Both.

Community organizations are, indeed, economically reliant on foundation grants. Grants were by far the largest single source of organizing revenue, making up 63 percent of income in 2002. The next three largest sources were membership dues at 10 percent, earned

income at six percent, and individual donations at six percent. However, grants did not have the chilling effect feared by some because the size of most grants was relatively small and almost none was renewed for more than three years. Without exception, community organizers want more grants, but at the same time, they are working to raise a greater percentage of their budgets from internal sources because it forces organizers and leaders, as the authors write, into “expanding one’s realm of comfort and influence, telling the organization’s story to a variety of audiences, insisting on accountability for commitments made, and paying constant attention to base-building.”

Although you can download a summary of the report, I highly recommend you get the entire report to learn about the current best practices on fundraising for community organization, promising practices for the future, and strategies for increasing the number and sources of grants.

- Download from www.comm-org.wisc.edu/papers2005/beckett.htm
- Order single hard copies from jane_beckett@sbcglobal.net
- 33-page summary is available at: www.communitychange.org/shared/publications/downloads/Promising_Practices_Revenue_Generation_Community.pdf

JOAN FLANAGAN IS A FUNDRAISING CONSULTANT AND TRAINER AND THE AUTHOR OF *SUCCESSFUL FUNDRAISING* (MCGRAW-HILL).

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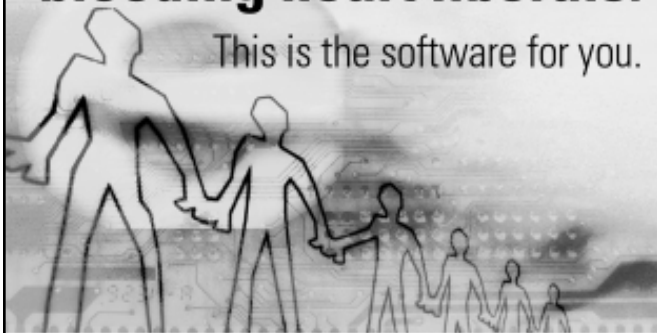
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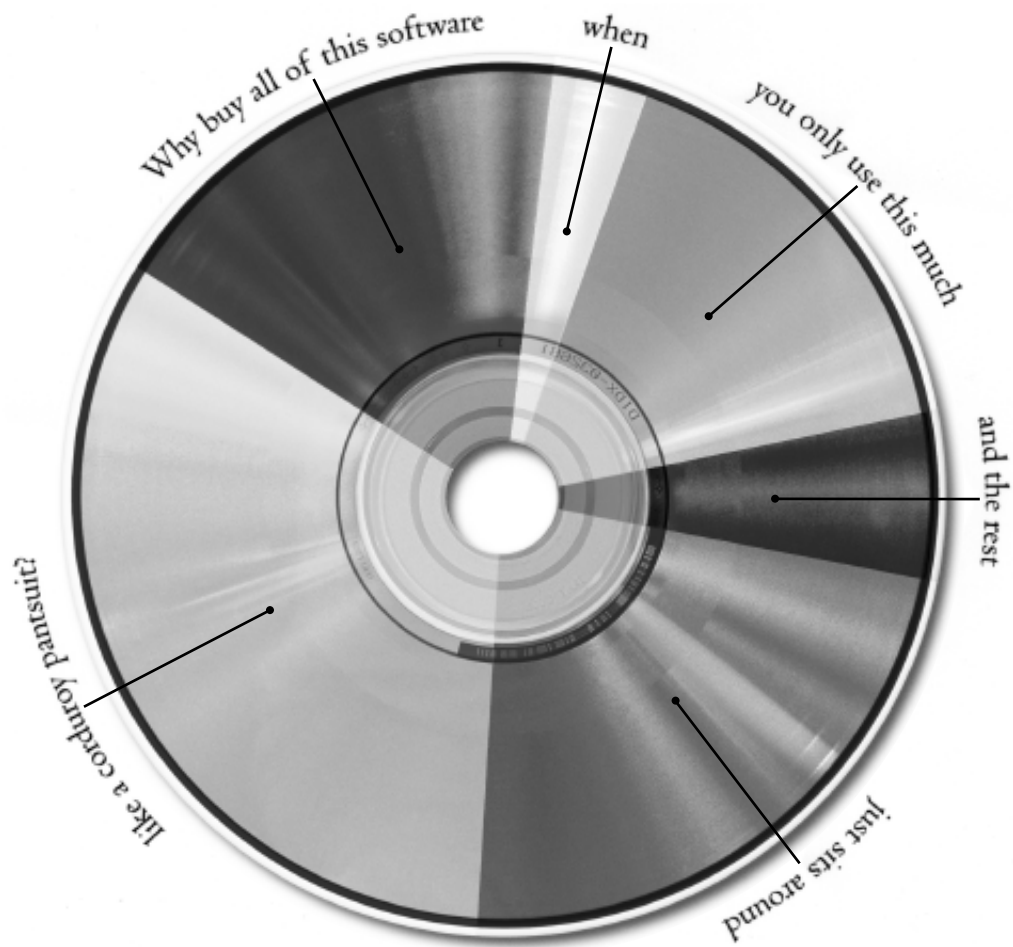
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