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On Our Cover · ANDREA WISE, PROGRAM ASSISTANT AT THE NATIONAL COMMUNITY DEVELOPMENT INSTITUTE, WELCOMES REGISTRANTS AT RAISING CHANGE: A SOCIAL JUSTICE FUNDRAISING CONFERENCE, PRESENTED BY THE *GRASSROOTS FUNDRAISING JOURNAL,* GRASSROOTS INSTITUTE FOR FUNDRAISING TRAINING (GIFT), AND THE BUILDING MOVEMENT PROJECT.

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LETTER FROM THE EDITOR

STEPHANIE ROTH

Many readers are aware of the conference in Berkeley that the *Journal* cosponsored last August, "Raising Change: A Social Justice Fundraising Conference." We were thrilled that so many of you were able to attend. Here are a few highlights of what made it such a successful event beyond our wildest expectations:

• There were 420 individuals in attendance from 225 organizations. They represented a broad range of issues, including immigrant and civil rights, women's and health issues, youth organizing, and racial, criminal, economic, environmental, and reproductive justice.

• People came from 28 states and four countries. Ages ranged from 17 to over 70. About two-thirds were people of color. This diversity was also reflected in the speakers and workshop presenters.

• Over the two days there were 28 workshops and 5 plenary sessions, as well as free half-hour consultation sessions with experienced fundraisers and organizational development experts. Here's a small sampling of the workshop topics: Fundraising in Immigrant Communities, The Future of Boards, An Outsider's History of Philanthropy, From Turf Wars to Unity: Organization-Building vs. Movement-Building, Raps that Raise Money, How to Build Your Donor Base on a Shoestring.

• Having interpreting services and handouts translated into Spanish allowed 25 monolingual Spanish-speakers to attend and actively participate in the sessions.

Most striking about the conference was the atmosphere generated by the energy of the crowd, which was consistently spirited and upbeat. My 18-year-old niece, Emma, who helped out one day, commented with amazement, "Everyone was so happy." I think much of the enthusiasm came from being together with such a diverse group of people (not your usual fundraising conference participants), along with having the rare opportunity to talk about the relationship of fundraising to movement-building and the politics of funding and fundraising. This opportunity made for lively discussions and debates, which gave people new energy and resolve to challenge conventional ways of thinking about — and doing — fundraising.

The conference led off with two inspiring talks, one by Sonya Garcia, former executive director of GIFT (Grassroots Institute for Fundraising Training) and the other by Kim Klein, founding publisher of the *Grassroots Fundraising Journal*. Their presentations are reprinted in this issue. Also in this issue is a tool that Kim and I developed to help board members and other reluctant volunteers identify skills they already have that can be applied to a range of fundraising activities. Finally, an article by Amy Showalter addresses the issue of lobbying activities for nonprofits, explaining what nonprofit groups can do without jeopardizing their nonprofit status (a lot, it turns out) and offering some useful tips for engaging volunteers in lobbying activities.

Finally, I can't resist a plug for Kim Klein's newest book—a completely revised and updated edition of *Fundraising for Social Change* — now available from www.josseybass.com/go/chardonpress.

Money, Happiness, Social Justice & the Future

OPENING KEYNOTES AT RAISING CHANGE: A SOCIAL JUSTICE FUNDRAISING CONFERENCE
BERKELEY, CALIFORNIA | AUGUST 4, 2006

Sonya Garcia-Ulibarri

It is amazing for me to be here with you today, to look out at this crowd of fundraisers, organizers, activists, and allies. It is also amazing for me to have the opportunity to share the podium with a woman who has been so influential in my career and my life, as I'm sure she has been for many of you — Kim Klein. When I met Kim, I was at my first event as a fundraising intern with the Grassroots Institute for Fundraising Training (GIFT).

I remember coming into fundraising with reluctance. Reluctance about asking for money. Reluctance about the abilities and skills I brought to the table. Reluctance about straying too far from my roots and commitment to community organizing and being down for a march or protest any day of the week. I remember asking the question, "Will I have to sacrifice my politics to be a fundraiser?" And even though I did need a job, I thought for a moment that fundraising might be too excruciating for me and my family. My dad, confused, asked, "Mija, are you going to beg for money every day?" This was even before I knew about the long hours, loads of stress, and little sleep that were ahead for me.

But something changed.

I sat in that GIFT training completely blown away, first, by the facts. Most of the money given away in the United States is not given by wealthy individuals. Donors are not restricted by race, class, gender, sexual orientation, ability, or any other category. My community was not just a recipient of other people's giving, but givers themselves. In a way that still seemed strange, I was a philanthropist, just like many, if not all, of you.

I am sure that many of you remember the amazing story of Oseola McCarty, the 87-year-old black woman who donated $150,000 to the University of Southern Mississippi. It was written, "Miss McCarty's gift has astounded even those who believed they knew her well. Customers brought their washing and ironing to her modest home for more than 75 years. She did laundry for three generations of some families. In the beginning she charged $1.50 to $2.00 a bundle." Speaking about her gift, Miss McCarty simply said, "I want to help somebody's child go to college."

I use this story not to say that everyone should give at this level, but as an example of how the most unsuspecting and generous individuals among us are often overlooked.

The second concept that blew me away was the idea that grassroots fundraising is political. Fundraising is organizing. Fundraising is activism. Fundraising is building a movement. And more specifically for us here, fundraising is about building a movement for social change, a movement that addresses the injustices that exist in our neighborhoods, our cities, our countries, and our world.

The opportunity to be a fundraising intern was in itself a response to an injustice — the lack of people of color in the field of fundraising. Even among social justice groups and organizations rooted in communities of color there is a racial disparity that exists in fundraising and other key leadership roles. GIFT empowered me to be an active participant in this work. I saw not only a change in myself, but the transformation of class after class of interns, all people of color, whose reluctance turned to fearlessness, to *ganas*. I realized how imperative it is for the most affected communities to have the opportunity to raise funds for their own struggles.

It is my hope that this conference will provide each of you with the information, tools, and skills you need to be effective fundraisers. But even more than the practical information, I hope you walk away inspired to continue your work knowing that fundraising was central to movements in history and is central to movements today.

Here are two brief examples I want to share with you.

The first is an excerpt from the book, *Putting the Movement Back into Civil Rights Teaching* (published by Teaching for Change and the Poverty and Race Research Action Council). It says, "The [Civil Rights] movement depended on many people who organized fundraising activities, car pools, and coordinated taxi service. [Martin Luther] King's oratory skills and leadership helped sustain the movement, but its victory was built on the daily contributions of many unsung activists."

The second is a quote that reflects on the beginnings of the United Farm Workers Movement. Cesar Chavez said, "I remember with strong feelings the families who joined our movement and paid dues long before there was any hope of winning contracts. Sometimes, fathers and mothers would take money out of their meager food budgets just because they believed that farm workers could and must build their own union. I remember thinking then, that with spirit like that...we had to win. No force on earth could stop us."

Not glamorous. Often unrecognized. Grassroots fundraising is a core component of the struggles we endure and fight.

Grassroots fundraising is:

- A neighborhood alliance advocating for decent, safe and affordable housing
- A coalition fighting for a living wage
- An organization working against the toxic pollutions that disproportionately affect their neighborhood
- A clinic breaking patterns of violence and addiction
- Our young people organizing in their schools
- A rally for the right to marry
- A march of hundreds and hundreds of thousands for immigrant rights
- A journey of indigenous people demanding their sovereignty
- And so, so much more

Even though I love fundraising with all of my heart, I hope that someday none of us ever have to raise a dollar, secure a sponsor, pass the hat, or do a pitch again. I hope that the movements for justice we have committed weeks, months, years, and lives to succeed and our communities can simply celebrate that fact. But until that day, you do not have to sacrifice your politics in order to fundraise, you have to fundraise in order to live out your politics.

As Maya Angelou so eloquently noted, "I have found that among its other benefits, giving liberates the soul of the giver."

So go out from here and liberate some souls!

SONYA GARCIA-ULIBARRI IS THE FORMER EXECUTIVE DIRECTOR OF GIFT (GRASSROOTS INSTITUTE FOR FUNDRAISING TRAINING) AND NOW DEVELOPMENT DIRECTOR OF HOPE COMMUNITIES. REACH HER AT SONYA @HOPECOMMUNITIES.ORG

Kim Klein

When I think about fundraising, I see it is mostly about questions: What is our goal? Whom shall we ask? What strategy shall we use?

I have come to believe that questions are more important than answers, particularly questions that are invitations: Will you join us? Will you help us? Can we talk? These are fundraising questions, certainly, but they need to be the questions of social justice also: Will you join us? What do you need to know? What would you like to say?

So often fundraising has been portrayed as the reason that something didn't happen: "We would have stopped pollution but we couldn't raise the money." That notion has to be abandoned and has to be replaced with the fact that fundraising can be a leading component of social change.

I want to go even further and say that lessons from fundraising can inform all of life, thus the title of this speech. The six points I will make here I learned from you and from people like you, all over the world.

1. WE MUST BREAK THE TABOO

The great science fiction writer, Ursula LeGuin, said, "I never learned much from my teachers, but I learned a great deal from my un-teachers — people who said to me, 'You shouldn't have been taught that and you don't need to think it anymore.'"

We must apply this lesson to money. We must once and for all stop learning — and stop teaching — that talking about money is not to be done in our culture.

It is considered as rude today to ask people what their salary is as it was when I started in fundraising 30 years ago. The inability to ask for money remains the major block to organizations raising the money they need. Yet like all taboos, what we think and feel about money is learned. Children don't have this taboo — they talk about

money and ask for money — until we teach them not to.

We have to deliberately and thoughtfully construct a new relationship with money. We can't wait for the culture to shift — it is not shifting fast enough. And there are too many people who want it to stay in place. Around the world, an elite and fairly secret class controls most of the wealth, either by inheriting it or by earning it, but most important, by being willing to understand everything they can about money and to actively campaign for policies that will increase their wealth.

It serves the interest of this ruling class of people for the rest of us to act as though money is not important to us. For example, as long as we cannot ask about other people's salaries, we will not be able to find out that someone is being paid more because he is white or less because she is a woman. As long as we do not understand basic economics, we will not be able to know what economic model to advocate for. It serves the interest of the ruling class for us not to be able to finance our nonprofits adequately, because then we are no threat to them.

Stop counting donations and start counting donors.

Without understanding money we will be unable to create a society in which wealth is more fairly and equally distributed — a main underlying goal of social justice movements. We must make not knowing everything we can about money a sign of gross political incorrectness and a sign of someone who is not serious about social justice. If we don't, we collaborate with the very system our work is designed to change.

2. COUNT DONORS, NOT FUNDS

Every organization must know why it exists: its mission and vision. But equally important, every organization must know how it wishes to be supported over the long haul. To be an effective force for change, an organization needs to have as much diversity in its income streams as it can possibly manage. In order to be mission driven, to do what needs to be done, to say what needs to be said to those who need to be told without fearing financial repercussions, you have to *not care* if someone stops funding you.

For maximum stability and flexibility, an organization's core operating income must come from a broad base of individual donors giving varying amounts, through a variety of strategies. Fundraising and program must be integrated, and everyone must accept a role in fundraising.

Most money given away in the private sector comes from individuals, and most of the gifts are from middle-class, working-class, and poor people. That's most people: 91 percent of Americans earn less than $100,000 per year, and 70 percent of adults give away money. More than half receive no tax benefit for their giving because they file a "short" tax form. More people give away money than attend a house of worship, vote, or volunteer.

People always tell me, "Grassroots fundraising is so hard. It is so much easier to get a large grant than attract lots of donors." It is hard when you just look at the money. But when you look at movement building, you see people, and fundraising brings in these people who then can give time, give more money, turn out for demonstrations, write to their congresspersons, talk to their friends.

We need to see our donor base as central to our movement base. Stop counting donations and start counting donors. Even if most of your donors never grace your door, they are at home, reading your newsletters, passing them on to friends, bookmarking your website, forwarding your action alerts.

So fundraising becomes a way to do several things — raise money, raise awareness, build a movement. Suddenly grassroots fundraising doesn't seem so unpleasant — in fact, it seems like organizing, and that is what it is!

3. SET BIGGER GOALS

Dorothy Day, founder of the Catholic Worker Movement, said, "We must always aim for the impossible: if we lower our goal, we diminish our effort." Che Guevara said, "Be realistic. Do the impossible."

We need much bigger goals. In fundraising, people love big goals. People are more likely to give to something big than something small.

Over and over I see organizations set fundraising goals and then fall short of them. Their board doesn't rise to the challenge, their development efforts don't yield enough, the executive director is pulled in a million directions and can't make the time to raise the money. So the next year they set the same goal, or possibly a lower goal. And what happens? They have the same experience.

But what is the problem? The problem is that meeting the goal would only give them the organization they have now — overworked, underpaid, poor infrastructure, old computers, too much to do and too few people to do it. Small victories, large losses. What is the incentive to meet a goal that gives you that? We must think much bigger.

Over the last 30 years, we have been worn down, and our ability to think big has been affected. For example, I started my fundraising career while working against domestic violence in a shelter for battered women in San Francisco. At that time, many of us believed that domestic violence would end in our lifetime. Now we see domestic violence programs that start endowments and plan to exist forever. Homeless shelters, which should exist, if they exist at all, as a temporary solution to a temporary problem, now

implement planned giving programs. I saw in a brochure the other day, "Your bequest will ensure that homeless people will always have shelter." But I want my bequest to ensure that there will no longer *be* homeless people.

So let's summarize our goals under these scenarios: women are still being beaten, but have better services afterward; people are still homeless, but have more access to shelter; environmental destruction will still be rampant, but there will be more recycling. It is no wonder we have a hard time mobilizing people.

We need to start with what we want, not what we can get funded to do. We must ask, What would it take to do the job? It is often surprising how little money is really needed. For example, according to the British health journal, the *Lancet,* it would take $6 billion more per year to provide basic education for all people in the entire world and $9 billion more per year to provide clean water for everyone in the world. $9 billion is about what the US is spending each *month* on our bloody and pointless war in Iraq.

In other words, the money exists. Huge fundamental change doesn't have to cost that much, and that is why grassroots organizations can be instrumental in bringing it about, if only we set big enough goals.

4. PURSUE ENGAGEMENT

The charity model must be deconstructed entirely. At its extreme, charity means that I, a good person working for a good organization, help you, a sad sack of garbage. You do not help me because I don't need help.

Organization after organization provides services, training, tutoring, leadership development, organizing — all for free to a constituency they describe as having no money. "The people we work with can't afford it." That is both condescending and patronizing. No one wants to be on the receiving end of charity.

It is not just that people value what they pay for. I do think people can value what they get for free. But when a person pays something, even a small amount, he or she now feels free to ask questions, to disagree, to complain. We disempower when we don't ask, and we need to ask ourselves, why would we rather not know what our constituency thinks?

We need to start with what we want, not what we can get funded to do.

Many of us are "greedy givers." A greedy giver can only give, and cannot receive, cannot ask for help, cannot acknowledge need or weakness. This is a charity model. A new model of engagement must take the place of this old model, and fundraising must take the lead. In the old model, the staff of the organization knew best what was to be done. People were encouraged to be grateful. In the new model, we encourage our constituents, who are now also our donors, to ask questions, to form opinions, and the gratitude is mutual.

Breaking down this charity model is not easy and will take the same discipline as deconstructing the taboo about money. The first and possibly most important step in breaking it down is to allow yourself to receive. To ask a question: "Will you help out? Will you contribute? What do you think we should say or do?"

5. TALK ABOUT TAXES

For the first 10 or 15 years that I did fundraising training, I was completely confident, based on the evidence, that if people did what I said, they would raise money. But starting in the mid-1990s, I began to see organizations that were running their fundraising programs almost flawlessly, yet were not able to raise the money they needed.

Increasingly, I had people in my trainings from *public* schools, *public* parks foundations, *public* libraries. Why? Because of the cutbacks in government spending. But these cutbacks cannot be made up by the private sector. In fact, recent research has shown that private-sector giving would have to go up *three times* as much as it has every year just to meet current needs, with no money for new programs.

Where this privatization becomes most real is in the military, where we see soldiers and soldiers' families raising money to buy Kevlar vests for those serving in Iraq and Afghanistan. And over and over we hear donors say, "I used to give to environmental groups or to the film festival, but now I have to give to my child's public school."

All of this points to the fact that taxes are a part of fundraising and those of us in fundraising must take the role of taxes seriously. Here's an example of the results of tax policy: In 1986, according to *Forbes* magazine, there were 13 billionaires in the US; worldwide there were perhaps 20. Then the Reagan administration introduced tax legislation that favored the top one percent of taxpayers. In one year the number of billionaires in the US almost quadrupled, to 49! More tax favors followed, so that today there are 230 billionaires in the US and 793 billionaires worldwide. They are the fastest-growing class in the world.

These people own $3 trillion in wealth. The combined wealth of these 793 people is about 30 percent more than the income of the 3 billion people worldwide who live on less than $2 a day. The GDP of the poorest 48 countries in the world combined is less than the wealth of each of the three richest people in the world.

Again, we come back to the point: the money exists to solve almost every problem in the world, and it is not hard to figure out where it is. It is a question of creating policies to distribute it.

Congress was recently debating a raise in the minimum wage. I am sure all of us would agree that at the least the minimum wage should lift a person out of poverty. But as housing advocates well know, the minimum wage does not provide enough money to pay the rent on a one-bedroom apartment or house anywhere in the US. So the minimum wage needs to be raised significantly.

But as United for a Fair Economy has proposed, progressives like us should propose a maximum wage as well — a point at which there would be a 100 percent income tax. In order for the maximum wage to rise, the minimum wage would have to rise because the highest-paid person could not make more than a certain percentage more than the lowest-paid person.

What are we going to do about taxes? Like other things related to money, the first step is talking about them. We must understand how tax policy is created and how our taxes are distributed. We must work against a bloated military so that so much of our tax dollar is not spent there. We must work to have taxes used instead for universal health care, education, the welfare of all people.

The money exists to solve almost every problem in the world, and it is not hard to figure out where it is.

For those who say these goals are unrealistic, consider that many countries in Europe have tax policies that provide a meaningful social safety net. Finland, for example, recently named the world's most competitive economy, has a 50 percent income tax, universal social services, and zero tolerance for poverty. In the US in the 1950s and 1960s, those in the top tax bracket paid 90 percent in taxes, which explains why there were few billionaires.

Beyond the US, we must work across national boundaries for a worldwide tax on income and capital gains, so that people and corporations can't simply move their assets from one country to another to avoid taxes.

6. LIVING SOCIAL JUSTICE VALUES

Money is a lot of things, but money is not everything. Time is not money, for example. Time is our most precious non-renewable resource. When this day is over, it's over. We can't get it back. We can earn more money, but we can't earn more time.

Money can help with happiness, but money can't actually buy happiness. Happiness is a social justice value. We must see being happy and helping others to be happy as social justice work. We must claim that kindness, patience, forgiveness, and generosity of spirit are just as important as integrity, commitment, and willingness to sacrifice for the greater good.

We have to love each other and we have to love those who are difficult to love. Love is hard. That's why in every religious and spiritual tradition, love is a commandment. You don't have to command people to eat or sleep or gossip — people do that. We have to be commanded to love.

My biggest mistake over my whole life was creating a hierarchy with my time and placing work at the top of it. For years, I worked all the time. Weekends and evenings were simply times to work uninterrupted. Airplane rides were times to read professional journals or political analysis. As I got older, I stopped doing that. But work still took the bulk of my time. There is a lot of talk now about work-life balance, but the point of that conversation is to further happiness.

People who work all the time, like me, are actually kind of lazy. We never have to make decisions about other parts of our lives because when we are not working, we are so tired that there is little else we can do. If I work all the time, I don't need to think, for example, about whether I should bring my elderly, housebound neighbor some fruit or some dinner or whether I should just go visit with her. I don't think about that because I have to work, partly for the rights of seniors.

Many of us in nonprofits love people and we work very hard to secure their rights and to make their lives easier, but sometimes we don't take enough time to show our love to individual persons — often especially our partners, our children, and our friends.

Many of us have become very concerned about global warming, the crisis of environmental sustainability. This is a serious and profound crisis that we must all participate in solving and insisting on policy solutions. However, global warming is related to and exacerbated by another crisis: the crisis of human sustainability — defined by *Guardian* columnist Madeleine Bunting as "a scarcity of the conditions which nurture resilient, secure individuals, families, friendships and communities." The consequences of the crisis of human sustainability can be found in the rising incidence of depression. It is thought that by 2020 depression may be the world's most prevalent disease. This is not simply a phenomenon of first-world countries — it is being documented in the rapidly expanding urban areas of China, India, Bangladesh, and Mexico.

Consider how union organizing has changed its focus from time to wages. The first meeting in Britain 140 years ago of what became the First International, a very large union, was commemorated recently with a watch for its members, which had its early slogan printed on its face: "We require 8 hours work, 8 hours for our own instruction, and 8 hours repose." Those were the values of the early organizers. Karl Marx said, "The politics of time is

essential to freedom. The shortening of the working day is the basic prerequisite for that development of human energy which is an end in itself, the true realm of freedom."

I would propose a maximum work week — the maximum amount of time anyone is allowed to work. If you want to work more, you can, but it would become a cultural norm not to. Again, this ideal exists in Europe, where more than 10 years ago, in 1993, the European Union's Working Time Directive set a 48-hour maximum work week and included requirements for rest and leave periods.

I want to end with a story that is a parable. It is about a sports hero named Florence Chadwick, the first woman to swim the English Channel both ways. Florence Chadwick held a number of other records, but this is a story of a failure. On July 4, 1954, she attempted to be the first person to swim from Catalina Island to the coast of California, about 22 miles. There was dense, thick fog, and the water was very cold. She could not see the boat that accompanied her. She could hear it and keep on course.

She swam for 15 hours and, exhausted, asked to be taken out of the water. Her trainer asked if she was sure she wanted to come out, but he was not allowed to tell her how much farther she had to go. She was one mile, or maybe 30 minutes, from shore. Later she said, "I'm not excusing myself, but if I could have seen the land I might have made it." It wasn't the cold or fear or exhaustion that caused Florence Chadwick to fail. It was the fog.

I believe we are in a thick fog, and we have been in the cold water for a long time, but I also believe we are only one mile from shore — the shore of a new day, of a new world. Unlike Florence Chadwick, we do not swim alone. We can and we must help each other swim this last mile, and once we get to shore, we must make sure that we never enter these cold, foggy waters again.

How will we do this? We must encourage people to do what they need to do to be able to make it. People who need rest must be encouraged to rest; people with energy to forge ahead must not hold back. Most of all, we must resist the temptation to go it alone. We must explore all the meanings of solidarity, of being a member of the community, of offering help and asking for help.

We can have the world we imagine. As the World Social Forum states, "Another world is possible." We must not be talked out of it or talked down from it. We are in an adventure of fundraising and social justice. Adventure comes from a Latin word, *advenio,* "I come closer." Adventure means continuing to go toward that which is unexplored as yet. Let us continue our adventure. GFJ

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Finding Your Inner Fundraiser: A SELF-ASSESSMENT TOOL

STEPHANIE ROTH & KIM KLEIN

One of the common reasons (or excuses?) given by board members and other volunteers as to why they can't participate in fundraising is that they don't know how. Explaining that fundraising is not so complicated, but based on basic common sense and a willingness to interact with people isn't always enough to encourage them to try it.

Here's a tool to help your potential fundraising team understand that they already have skills and experience that can be applied to fundraising. We created this assessment form to help board members, volunteers and other prospective fundraisers identify their areas of interest and talent for different types of fundraising strategies.

Generally, fundraising strategies encompass the following types of activities: asking someone directly for a gift, social gatherings, and selling something.

• ***Asking someone directly for a gift:*** Although these are the most challenging strategies to implement because they require you to feel comfortable asking for money for your cause, they also generate the most money for the time involved in carrying them out.

• ***Social gatherings:*** These are activities that bring people together — at someone's home, in a larger public setting, or to carry out a pledge-raising event, better known as some kind of "-thon" (such as a walk-a-thon).

• ***Selling:*** With these strategies, the donor makes a purchase and receives — or has the chance to receive — something tangible for their gift. This could be a chance at a prize (as in a raffle), publicity for their business (such as in an ad book), or a clean car (in the case of a car wash).

The self-assessment tool presented here correlates certain skills and preferences to these three types of fundraising strategies. It helps identify activities many people have done that are not fundraising activities per se, but that require skills similar to those needed for fundraising.

When people using this tool tally their responses at the end, they can see the type of fundraising activity they seem most suited to based on their responses to the 10 questions. For example, are they most suited to a fundraising task that involves asking someone directly for money? Would they feel more comfortable selling something, such as a raffle ticket or an item at a garage sale? Or are their preferences and talents more along the lines of organizing an event that brings people together to celebrate and support the work of the organization?

Share this self-assessment tool with your fundraising team — it may even generate some enthusiasm to join your fundraising efforts. You can download and print a version of this form that is more user-friendly at: ***www.grassrootsfundraising.org/assesstool*** GFJ

STEPHANIE ROTH IS THE EDITOR OF THE *GRASSROOTS FUNDRAISING JOURNAL* AND CO-DIRECTOR OF GIFT. KIM KLEIN IS THE PUBLISHER EMERITUS OF THE *GRASSROOTS FUNDRAISING JOURNAL.*

Fundraising Strategy Self-Assessment Tool

The following questions can help you identify the kinds of fundraising activities you would have the most fun with, as well as ones that require skills you already have. For each, put a check mark next to the appropriate answer, then follow the instructions for using the Tally Your Results section. Download and print a more user-friendly version at ***www.grassrootsfundraising.org/assesstool***

1. I've organized large (more than 30 people) birthday parties, weddings, or similar kinds of events.

IF YES: I… ☐ *enjoyed* ☐ *didn't mind* ☐ didn't like the experience
IF NO: I… ☐ *would be willing to try it* ☐ would rather not try it
☐ Check here if your response was one of the italicized ones — then go to "Tally Your Results" (below) and circle #1.

2. I work (or have worked) in sales.

IF YES: I… ☐ *enjoyed* ☐ *didn't mind* ☐ didn't like the experience
IF NO: I… ☐ *would be willing to try it* ☐ would rather not try it
☐ Check here if your response was one of the italicized ones — then go to "Tally Your Results" and circle #2.

3. I have gone door-to-door in my neighborhood for some kind of cause (political, social, fundraising).

IF YES: I… ☐ *enjoyed* ☐ *didn't mind* ☐ didn't like the experience
IF NO: I… ☐ *would be willing to try it* ☐ would rather not try it
☐ Check here if your response was one of the italicized ones — then go to "Tally Your Results" and circle #3.

4. I do or have done public speaking.

IF YES: I… ☐ *enjoyed* ☐ *didn't mind* ☐ didn't like the experience
IF NO: I… ☐ *would be willing to try it* ☐ would rather not try it
☐ Check here if your response was one of the italicized ones — then go to "Tally Your Results" and circle #4.

5. I have or have had jobs (paid or volunteer) that required close attention to detail.

IF YES: I… ☐ *enjoyed* ☐ *didn't mind* ☐ didn't like the experience
IF NO: I… ☐ *would be willing to try it* ☐ would rather not try it
☐ Check here if your response was one of the italicized ones — then go to "Tally Your Results" and circle #5.

6. I have or have had jobs (paid or volunteer) that required organizing or supervising a number of people.

IF YES: I… ☐ *enjoyed* ☐ *didn't mind* ☐ didn't like the experience
IF NO: I… ☐ *would be willing to try it* ☐ would rather not try it
☐ Check here if your response was one of the italicized ones — then go to "Tally Your Results" and circle #6.

7. I have or have had jobs (paid or volunteer) that required recruiting people to do something.

IF YES: I… ☐ *enjoyed* ☐ *didn't mind* ☐ didn't like the experience
IF NO: I… ☐ *would be willing to try it* ☐ would rather not try it
___ Check here if your response was one of the italicized ones — then go to "Tally Your Results" and circle #7.

8. I am often in situations where I have to interact with people I don't know very well.

IF YES: I… ☐ *enjoy* ☐ *don't mind* ☐ don't like the experience
IF NO: I… ☐ *would be willing to try it* ☐ would rather not try it
☐ Check here if your response was one of the italicized ones — then go to "Tally Your Results" and circle #8.

9. I do talk or have talked to my friends about causes that I care about and why I care about them, even when I know my friends may not agree with me.

IF YES: I… ☐ *enjoyed* ☐ *didn't mind* ☐ didn't like the experience
IF NO: I… ☐ *would be willing to try it* ☐ would rather not try it
☐ Check here if your response was one of the italicized ones — then go to "Tally Your Results" and circle #9.

10. My work (paid or volunteer) includes writing press releases, marketing and promotional materials, or advertising copy.

IF YES: I… ☐ *enjoy* ☐ *don't mind* ☐ don't like the experience
IF NO: I… ☐ *would be willing to try it* ☐ would rather not try it
☐ Check here if your response was one of the italicized ones — then go to "Tally Your Results" and circle #10.

TALLY YOUR RESULTS:

3 7 9 10: **Direct Asking** • 2 4 8 9: **Selling** • 1 4 5 6: **Social Gatherings**

The type of fundraising activity you are likely most suited for is the one that has the most numbers circled. You may well be a person who likes or is willing to try more than one of these types of strategies. Many people who are good at selling are good at direct asking; just as often, someone who likes social gatherings will be good at selling. Talk with the leader of your fundraising team about matching your skills and preferences with the group's fundraising plan.

Grassroots Lobbying for Change: *Mobilizing Your Community*

AMY SHOWALTER

Some of the most extraordinary policy achievements in recent decades were accomplished because grassroots volunteers lobbied government decision makers.

Consider these examples:

- Nearly all of the 14 state laws banning smoking in the workplace were won by grassroots advocates, who sometimes began pushing their cause at City Hall.
- Colorado laws requiring booster seats in cars, graduated driver's licenses for teens, and increased funding for child immunizations were pushed into place by a network with more than 4,000 grassroots advocates.
- Grassroots volunteers convinced Kentucky legislators to double state funding for low-income housing after a campaign that lasted less than four months.

Volunteers can be extremely effective legislative advocates, and working with them can be dramatic, exhilarating and rewarding. Every successful social movement has relied on motivated volunteers.

Unfortunately, many nonprofits don't understand their own power. They avoid legislative work because they mistakenly believe lobbying activities will jeopardize their tax-exempt status. On the contrary: nonprofits that choose not to lobby aren't taking full advantage of their rights under the broad, flexible laws that govern these activities.

This article explains how any organization with 501(c)(3) status can build a grassroots advocacy network and do lobbying within the confines of the law. In many cases, complying with federal lobbying laws can be as simple as filing a single form with the IRS.

BUILDING YOUR VOLUNTEER NETWORK

Step One: Recruit Volunteers

Begin by considering where you can find volunteers for your lobbying efforts. Start with your organization's strengths — mine your database of donors and volunteers: Who in your organization has relationships with legislators or people with connections to legislators? Who are the effective communicators?

To be successful, you must involve all facets of your organization in your advocacy efforts — including your board of directors. Board members are the leaders in demonstrating the behavior the organization wants from its members. If members of the board aren't willing to help, it will be difficult to motivate people further down in the organizational structure.

Board members can also be key in recruiting volunteers for the advocacy cause. Too often, boards believe it is the job of staff to recruit volunteers. Although it is appropriate for staff to provide the tools, *ultimately the best advocates are recruited by satisfied volunteers.*

The Internet is the new frontier for recruiting volunteers for grassroots advocacy. Many nonprofits build a database of past supporters and contributors and ask them to join the cause — usually by asking them to send emails to legislators. That's a good first step. But leaders of strong grassroots networks are always looking for ways to have personal contact with volunteers recruited online. Just as important, grassroots leaders don't rely on the Internet to find all their volunteers.

Some organizations ask core volunteers to serve as district captains who then recruit volunteers from their neighborhoods. There might be one district captain for each legislative district or one who is responsible for a few adjacent legislative districts.

The Tobacco Free Mass Coalition — whose mission is to reduce death and disease in Massachusetts caused by tobacco use — hosts house parties to recruit volunteers. A volunteer who's already involved develops a list of friends, neighbors, and other potential volunteers, sends out an invitation, and provides food and drink.

"The night of the party is mostly mingling and very relaxed," said Diane Pickles, executive director of the Tobacco Free Mass Coalition, "then I spend about five minutes making an appeal for funding — I describe Tobacco Free Mass and the work we do and ask each attendee to make a donation. We also urge all attendees to get involved as grassroots advocates by signing up for our grassroots network.

"I love the parties," she went on, "because they are a wonderful way for us to achieve two goals at the same time—raise funds for our coalition from individual donors and recruit new advocates."

Step Two: Retain and Motivate

Be very specific about what you want your volunteers to do and give them lots of support. I've watched advocacy programs struggle because staff members don't set concrete requirements and measure how well their volunteers meet them.

If the volunteers' job is to send letters or emails to legislators, help them get access to websites that provide legislator contact information. (Project Vote Smart is an excellent resource for information about lawmakers and candidates for office.) If you want volunteers to visit legislators or their staff, help them prepare for the meetings with talking points and background information.

For your advocates to be effective when you need them, you have to keep them engaged and involved when you don't. Engage your volunteers throughout the year — not just during legislative sessions. This will help them feel connected and keep them informed about the issues. And don't just send them emails. Invite them to community events or legislative forums.

For your advocates to be effective when you need them, you have to keep them engaged and involved when you don't.

The Homeless and Housing Coalition of Kentucky worked on homeless and low-income housing issues for years, all the while building and nurturing its statewide grassroots network. For more than a dozen years the coalition used its member organizations and a cadre of loyal volunteers to raise the organization's profile. They lobbied on housing-related issues during each legislative session, held and participated in rallies showcasing the need for low-income housing, and in the last several years, organized an annual conference on housing and homeless issues.

When a bill that would double funding for Kentucky's Affordable Housing Trust Fund was considered in the legislature in early 2006, the coalition used its network to generate scores of phone calls to legislators during each week of the legislative session and staged two rallies at the capitol with about 350 people at each. Throughout the session, core members of the network scheduled dozens of face-to-face meetings in which homeless people, industry supporters, and advocates met with their lawmakers. The bill passed with broad, bipartisan support.

Another way to keep volunteers involved and motivated is to recognize the good work they are doing. Brief thank-you notes as well as acknowledgment at meetings and in your newsletter can serve to reinforce the behavior that gets things done. These efforts can culminate with a volunteer being recognized as grassroots "Volunteer of the Year."

Look for ways to get volunteers who can't make it to legislative hearings or advocacy events involved. A few years ago the Tobacco Free Mass Coalition thought of a novel way of delivering constituents' messages to legislators. They provided their volunteers with a toll-free number where they could tape-record statements about why legislators should support a bill prohibiting smoking in workplaces, restaurants, and bars. The coalition put the 12 best stories on a CD that they gave to legislators, and mounted them on their website.

"It was a way to get volunteers involved without having them at the hearings," Pickles said, "It is hard to get someone to take a day off of work and come into Boston."

In July 2004 the Tobacco Free Mass Coalition succeeded in helping Massachusetts become the sixth state to pass a comprehensive no-smoking law. The coalition saw the victory as another way to engage their volunteers. The coalition posted a "Thank you journal" on its website and asked volunteers to log on and say why they were thankful that Massachusetts had become smoke free. Volunteers wrote about how the new law had changed their lives — for example, how their asthmatic kids were now able to eat in restaurants. Then the coalition printed copies of the best stories and delivered them to the state senate and house leadership.

The Grassroots Advocacy Network of the Children's Hospital of Denver is a textbook example of how nonprofits can establish themselves as legislative powerhouses. The 4,000-member network is a six-year-old coalition of health professionals, community leaders, educators, parents, and hospital employees whose members have relationships with legislators across the Colorado. Staff at the hospital routinely ask network members to speak to community groups; volunteer at rallies, press conferences, and other advocacy events; and write letters to the editor about issues affecting children — even when proposed legislation isn't pending.

When quick action is needed, these volunteer advocates can be counted on to mobilize quickly. Some of the volunteers even operate at an advanced level — leading recruitment efforts, strategizing about the best way to engage legislators, or participating in meetings with legislators with whom they have personal relationships. Advanced volunteers who are well-informed and can speak articulately about the issues can be a terrific resource when it is time to meet with legislators — or, more often, their staff members — at state capitols or in Washington D.C.

Step Three: Connect with Legislators

The size of your network is not as important as the credibility of the volunteers you have engaged. If they know the right legislators — or more important, if the legislators get to know them — you can get some attention and get things moving. I've seen an advocacy network

with 12 volunteers get legislation passed and networks with thousands of volunteers flounder. The difference was simple: the smaller network was made up of highly motivated, engaged volunteers with connections to legislators.

Advocacy groups can build their credibility with legislators by providing needed information about an issue, making sure the legislator's staff are fully informed on the issue in question, and scheduling a series of brief meetings with each legislator whose voting record indicates they might be sympathetic to your cause.

Don't repeat the mistakes of many large grassroots advocacy organizations that have over-emphasized email advocacy. These organizations urge their volunteers to use Web-based advocacy to send personalized letters or emails to their elected representative with a few computer clicks. Email campaigns have a place in today's political process, but their usefulness is increasingly limited — especially as far as Congress is concerned. Congressional staff report that they believe much of the email they receive from advocacy groups is not written by the person who sent it. Last summer some members began requiring email correspondents to solve a simple math problem in order for their emails to get through. The idea was to ensure that the emails were coming from actual people, not mass-mailing computers of the kind often used by interest groups.

Even in today's digital democracy, any credible, experienced grassroots activist will tell you that a good campaign culminates with an old-fashioned lobbying technique—face-to-face meetings with legislators and their staffers.

Email advocacy has a place in grassroots activism — as long as it is part of a plan that includes personalized, customized communications between constituents and lawmakers. Even in today's digital democracy, any credible, experienced grassroots activist will tell you that a good campaign culminates with an old-fashioned lobbying technique — face-to-face meetings with legislators and their staffers. Too often, grassroots organizers have spent too much time organizing their online volunteers and not enough time engaging them personally. Make sure your volunteers understand that meeting with staff is the norm and where much of the action takes place.

Step Four: Make Your Group Memorable

It's essential to have a simple logo or a short phrase or slogan that sums up your organization and its message. The idea is to have a "brand," or an easily recognizable image that volunteers and legislators will associate with the cause.

The American Heart Association's "You're the Cure" slogan is a good example. The Kentucky Homeless and Housing Coalition made up stickers with the phrase "Open the Door" and a simple logo — a keyhole on a bright yellow door — to summarize its message. When volunteer advocates crowded into legislative committee rooms, the stickers they wore were an easy, quick way to make their presence known. They didn't need to say a word.

LAWS GOVERNING LOBBYING

The rules governing nonprofit lobbying are broad and fairly easy to follow. Federal tax law controls how much lobbying 501(c)(3) organizations can engage in, and the Internal Revenue Service (IRS) enforces the law. Based on overall expenditures, most nonprofits can spend up to 20 percent of their budget on direct lobbying activities intended to influence legislation. The limits depend only on the money you spend, so volunteer efforts and cost-free activities — public education work and pro-bono litigation and research, for example — aren't factored in.

According to the Alliance for Justice, an association of public interest organizations that works to strengthen the nonprofit sector's influence on public policy, filing a simple one-page form with the IRS (Form 5768) is probably the only step required of most nonprofits. Nonprofits that want more guidance on these issues should contact the Alliance for Justice: www.afj.org.

Nonprofits that do very little lobbying may not have to file anything — especially if that lobbying is limited to an "insubstantial" part of the organization's overall activity. But organizations like Alliance for Justice urge nonprofits to use the "20 percent rule" and file with the IRS, because the law that describes the "insubstantial" lobbying rule offers no clear definitions regarding what constitutes lobbying, what an "insubstantial part" is, or how to measure activities. Filing Form 5768 gives nonprofits a much clearer sense of their obligation.

Overall Lobbying Limit

There are two types of lobbying — direct and grassroots. Direct lobbying is communication with a legislator (federal, state, local) or legislative staff member that refers to specific legislation and takes a position on the legislation. It also includes communication with the general public on ballot measures.

Grassroots lobbying is communication with the public that refers to specific legislation, reflects a view of the legislation, and contains a call to action, such as asking the public to contact their legislators. You can use the entire amount of money available for lobbying on direct lobbying, but you can only use 25 percent of it on grassroots lobbying.

If your group's budget is less than $500,000 the amount of money your group can use for lobbying is 20 percent of its budget.

Organizations with budgets of more than $500,000 may use a diminishing percentage of their budget for lobbying activities. To determine such an organization's lobbying limits under the IRS's 501(h) expenditure test, you begin with the organization's "exempt purpose expenditures," which for most organizations is the amount of money they will spend in the current fiscal year minus some fundraising and capital costs (for more detail, check with Alliance for Justice).

Once you have determined this number, the following formula gives you the amount you can spend on lobbying:

20% of the first $500,000 of an organization's budget
+ 15% of the next $500,000 of the budget
+ 10% of the next $500,000 of the budget
+ 5% of the remaining budget

The total of these percentages is your overall lobbying limit — with a cap of $1 million regardless of the size of the organization.

Election-Year Limits

Nonprofits are strictly forbidden from engaging in any political activity in support of or in opposition to any candidate for public office. Specifically, they cannot:

- Endorse candidates for public office
- Make any campaign contributions or expenditures on behalf of candidates
- Publish or communicate anything that explicitly or implicitly favors or opposes a candidate

Nonetheless, nonprofits can engage in these specific activities related to elections for office:

- Conduct non-partisan public education and training sessions about participation in the political process
- Educate all of the candidates on public interest issues
- Sponsor candidate debates (with certain restrictions)
- Conduct nonpartisan voter registration drives

CONCLUSION

Establishing and maintaining a grassroots advocacy network takes time and commitment. Some of the work is tedious. But using a network to execute a well-run legislative campaign can be extremely rewarding for nonprofit staffers and their supporters. Good campaigns almost always raise and polish a nonprofit's profile, generate community support, and fuel ongoing fundraising efforts. By harnessing the power of the legislative process, nonprofits can get measures passed, laws tightened, and ultimately show why they are relevant. GFJ

AMY SHOWALTER OWNS THE SHOWALTER GROUP, INC., A CINCINNATI-BASED FIRM THAT ADVISES TRADE ASSOCIATIONS, FORTUNE 500 COMPANIES, AND NONPROFIT ORGANIZATIONS ON HOW TO INCREASE THEIR GRASSROOTS AND PAC EFFECTIVENESS. CONTACT AMY AT AMY@SHOWALTERGROUP.COM OR VISIT WWW.SHOWALTERGROUP.COM.

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