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On Our Cover • YES, IT IS POSSIBLE TO HAVE SERIOUS DISCUSSIONS ABOUT FUNDRAISING AND MOVEMENT-BUILDING, LEARN SOME NEW FUNDRAISING SKILLS AND STRATEGIES, AND HAVE FUN... ALL AT THE SAME TIME! HERE ARE JUST A FEW PHOTOS FROM *RAISING CHANGE 2008: A SOCIAL JUSTICE FUNDRAISING CONFERENCE*. YOU'LL FIND MORE, AS WELL AS USEFUL FUNDRAISING RESOURCES FROM THE CONFERENCE, ON OUR WEBSITE, WWW.GRASSROOTSFUNDRAISING.ORG.

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LETTER FROM THE ASSOCIATE PUBLISHER

JENNIFER EMIKO BOYDEN

With the fall fundraising season in full swing, many of us are busily working to finish out our 2008 budgets. We at GIFT are included in that group, and we're also using this time to do some evaluation and planning for 2009. That's where you come in. *We want and need to hear from you*, so we are offering an online survey where you can give us your thoughts: do you want shorter articles or quick tips, more graphics, access to the archives? Are there topics that we've been covering too much of or too little? Is it time for the paper edition to go virtual? We also want to know what other fundraising resources you need to help you continue the important social change work you're doing. Please visit www.grassrootsfundraising.org to complete the survey by November 15th, and while you're there, please consider making a donation to help GIFT continue to develop resources that are timely and relevant to you.

Shortly after this issue reaches your mailbox, we'll be voting for the next president of the United States. In the July/August 2004 issue of the *Journal*, Kim Klein wrote, "Here's my prediction for the outcome of the presidential election: I think it will be a white man, Yale graduate, and member of the secretive Skull and Bones Society [characteristics that applied to both presidential candidates that year]. Anyone wish to bet against me?" Only a fool would have taken that bet, and while I'll refrain from making any predictions on the outcome of the 2008 presidential election, it's safe to say that at least this year Kim's money wouldn't be a sure thing.

No matter who wins the presidential election in November, there's no getting around that the hard times we're in will continue for some time. Nonetheless, in every time of national crisis since 1980 (including financial and political crises and times of war), giving by individual donors has only declined once — in 1987. While the current economic downturn is far more severe than any in recent memory, we believe that most people will continue to give what they can to organizations they believe in. It will be important in the months ahead to acknowledge the times we're in, to strengthen our connection with our communities and particularly with our donors, and to let people know how and why our work needs to continue — and how their support makes a difference.

We hope that the articles in this issue of the *Journal* will inspire you to continue your essential work during the difficult days ahead. We lead off with the keynote addresses from Raising Change 2008: A Social Justice Fundraising Conference by Robby Rodriguez and Katherine Acey. Robby reminds us of the large percentage of Americans who give away money (70%), and encourages those of us working for social justice to collaborate with each other to create much greater impact (making one plus one equal ten), rather than compete with one another. Katherine describes the "a-ha" moment when her staff "got it" that not only does fundraising support programs, but programs support fundraising — that only good programs supported by the communities you serve will earn the financial support from your donors/constituents. An article from Mal Warwick reminds us of the need to consider a variety of factors when budgeting for fundraising, and Kim Klein offers some concrete and useful ideas for ways to raise money in the month of December.

In the midst of what can feel like a frantic, overwhelming time of year, we also hope you'll take some time away from work to enjoy the holiday season.

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Fundraising & Movement Building

KEYNOTE SPEECHES FROM RAISING CHANGE 2008: A SOCIAL JUSTICE FUNDRAISING CONFERENCE

SAN FRANCISCO, CALIFORNIA | JULY 25, 2008



Robby Rodriguez

1+1=10: A New Equation for Social Change

Here's a story that helps me think about the possibilities of our work in a different way. For much of the last century and into this one, scientists have been trying to figure out something called the Theory of Everything. The theory of everything is what is supposed to tie together Einstein's general theory of relativity and quantum mechanics in order to explain the nature of space and time. Einstein's theory helps explain the world from afar, while quantum mechanics helps explain the world from up close. Both theories are not wrong. However, they contradict each other. That's where the theory of everything comes in — it is supposed to either make sense of the contradictions or make them disappear.

The leading theory that could be the theory of everything is string theory. But the problem with string theory is that there are billions and billions of permutations — it's like 10 to the 500th power. With current technology, it is going to take scientists forever to test all the possibilities. However, one young scientist in particular, a woman named Fotini Markopoulou, has developed what many scientists believe could be a major breakthrough in string theory that could lead to the theory of everything.

In discussing her work in *Esquire Magazine*, Markopoulou was cautious about whether her theories might prove true. "We all have theories that are not even wrong," she is quoted as saying. "Someday, to be wrong, it would be exciting."

To be wrong would be exciting.

I've thought a lot about that statement, especially about how we view failure in our work and how we might change that perspective. But her statement has also helped me think of us as the string theory scientists busily working on our breakthrough, hoping to be wrong so that we are one step closer to being right.

I'd like to share with you some observations and ideas from the field that come as a result of being wrong.

THE SOCIAL CHANGE ORGANIZATION DILEMMA: "We know we can't do it all and yet what we do isn't enough."

What is this dilemma? It's that even if we executed our mission to perfection, it would not be enough to create the world we want to live in. So some may say, then we have to do more. This may be true, many of us want to increase our capacity to get to scale, to do our work better, to have greater impact. But even if we increased our capacity it still wouldn't be enough to see the change we dream of. So we come to the conclusion that we know that what we do isn't enough and yet we can't do it all. This is not news to many of us, and I know that many of us are working through this dilemma by forming coalitions, alliances, and partnerships, and that is good.

But by and large, those coalitions tend to be tactical and not strategic. That is to say, they have a short-term focus instead of a long-term outlook. These tactical coalitions that we build are important, but for us to break through, the solution to the dilemma that "We can't do it all and yet what we do isn't enough" must be at the forefront of our work. It is that dilemma that should be on the table as we make our strategic plans and work plans and proposals that help us to fulfill our missions. Our own organizational plans need to be addressing the dilemma. In part, that is what movement building is about.

Which leads me to my next point: we need a new equation for maximizing our potential.

A NEW EQUATION FOR MAXIMIZING OUR POTENTIAL: 1+1=10

Right now, the way we work as a movement, most of the time, is $1+1=2$. But we can't afford to keep that pace. The world is in peril. We are at a crossroads. For us to live in the world we dream of, $1+1$ must equal 10. And it is already happening.

The US Social Forum took place a year ago in Atlanta, Georgia. More than 10,000 people working for social change from all over the United States and abroad gathered under the banner that in order for another world to be possible, another United States is necessary. Grassroots groups from all over the country came together in a spirit of cooperation and against all odds put together the largest gathering of social justice activists in a generation. And the possibilities for change that came out of this gathering were endless.

To quantify the outcomes of the Social Forum would take a supercomputer — the number too big to understand. Kind of like string theory: so many possible wrong answers and each of them exciting.

And just in the last year, since the US Social Forum, some amazing things have happened:

- ***The Right to the City Alliance*** — an alliance of base-building organizations from cities across the country as well as researchers, academics, lawyers, and other allies — have come together to build a united response to gentrification and the drastic changes imposed on our cities. Last month they organized a march on the US Conference of Mayors in Miami and held a convening demanding affordable housing, protection of public space, improving our schools and transportation systems, and discussing a people's platform for a US urban agenda.

- ***Domestic Workers United*** — an organization of Caribbean, Latina, and African nannies, migrants, housekeepers, and elderly caregivers in New York, organizing for power, respect, and fair labor standards — just hosted the first National Domestic Workers Congress in June. For four days, more than one hundred nannies, housekeepers, and caregivers came together in New York City — one of the most important domestic-work capitals — to share their stories and to strategize solutions with regard to their collective mistreatment.

- ***Groups who participated in the Peoples' Freedom Caravan*** — a bus caravan on the way to the US Social Forum that took 400 people from the south and southwest to learn from and lend support for more than a dozen communities — just convened for the second time since last July in Albuquerque and have renewed their commitment

to building racial unity and regional solidarity between the people of those two regions. On that caravan I saw $1+1=10$. We shared culture, values, interests, and needs. I saw the potential for a new southern strategy that defies conventional wisdom with a vision for change from the grassroots.

- And then there's the National Day Laborer network, the Pushback Alliance, the Building Movement Project, the Media Action Grassroots Network, the Grassroots Global Justice Alliance, and the list goes on and on.

I believe this is proof that when we come together in a different form of collaboration that puts our issue silos and institutions to the side for a moment, our work grows exponentially.

$1+1=10$ is also the equation of grassroots fundraising. Because $1 \text{ gift} + 1 \text{ gift} = 2 \text{ gifts}$, but two gifts also bring two donors, who have at least two friends each, and who themselves may make two or three gifts every year for years and years. And this is how many small nonprofits have become larger — by leveraging the power of their donors.

We know $1+1=10$ has to be the norm for how we do our work.

ABUNDANCE VS. SCARCITY

When it comes to the challenges to recreate this world, if you listen to us, sometimes we can be pretty negative: Local groups don't have the resources of the national groups. Organizing groups don't get the financial support that policy groups get. The funding gap between environmental justice groups and conservation groups is enormous. And so on. We look at our challenges from a perspective of scarcity. So we compete with each other and we talk trash about each other and criticize one another. We don't have a healthy respect for each other's work. Again, this type of thinking keeps us from working together more creatively, and it keeps the equation at $1+1=2$ or worse.

One way this relates to fundraising is that all this competition and talking trash about each other is about positioning ourselves as the best group, the most politically developed, the most effective in our work, the most connected to who's important in the world, and so on, so that we can convince funders to give us the biggest grants and invite us to the important convenings, instead of thinking about how all of us need to be in this movement together.

What if we brought a perspective of abundance? If we did, we could honestly say, "We may not have much, but let's not underestimate what we do have." If you were to map out the social justice infrastructure, even just mapping the infrastructure represented by people in this room, you gotta say it's not too shabby. In this room alone we have years of experience in 36 states and four countries. We have

dozens of board members and volunteers, and hundreds of development directors and executive directors. And when we added up the total amount of all the budgets of all the groups attending this conference, it came to \$431 million! Forget about not too shabby, that is damn impressive.

So when we come from a perspective of scarcity, we shortchange and underestimate ourselves. We have to focus on our potential, and there's tons of it.

This potential reminds me of a T-shirt I saw this week while walking around San Francisco. It said, "So many men, so little time." I want to create a T-shirt that only people like us would understand: "So many givers, so little time." Why do we think there are so few people who will help us, when seven out of ten adults give away money? Far more Americans donate money than vote or go to a house of worship or volunteer. We have plenty of potential donors, we just need to get out there and ask them. I'm amazed when I think about how many people have not been given the chance to say no to me yet!

I want to briefly talk about another example, the Obama campaign. (This is a nonpartisan event and we endorse no candidates, but it's a great example.) If you would have asked us four years ago whether the Democratic nominee was going to be a black man whose name is Barack Obama, we would have said "No way. Ain't gonna happen. Not in this country." And look, it's happening. Not only is it happening, but he has inspired millions of people — millions of disenfranchised people — to participate in a movement for change and hope, with a motto of "Yes we can/Si se puede." Sound familiar?

When I ask my friends how, in less than two years, could the Obama campaign accomplish what it has accomplished, many say, "If we had \$100 million, we could do that too." Guess what? We have that. We have way more than that — just in this room! Not only do we have more money than that, we have the experience, the expertise, and the creativity to match what the Obama campaign has assembled.

But it is trapped in the dilemma of "We know we can't do it all and what we are doing isn't enough." It is trapped by the equation of $1+1=2$ that dominates our sector. It is trapped by the politics of scarcity over abundance. And it is trapped by the fear of being wrong.

COMING TOGETHER

When we aren't afraid to be wrong, and in fact when we say, "To be wrong would be exciting," we can recognize the dilemma we are in — that we can't do it all and yet we know that what we do isn't enough. And when we recognize our dilemma we can start thinking about new forms of collaboration.

We can think about coming together to build power instead of thinking within our issue silos. We can think about collaborating with different types of groups — organizing groups collaborating with service groups, artists with organizers, schools, and communities.

We can think of working across generations, so that we are not just thinking about replacing leadership but transitioning it, expanding it, mentoring it, and sharing it in ways we never thought possible so we begin to aggregate

THE REPUBLIC OF POETRY *by Martín Espada*

In the republic of poetry,
a train full of poets
rolls south in the rain
as plum trees rock
and horses kick the air,
and village bands
parade down the aisle
with trumpets, with bowler hats,
followed by the president
of the republic,
shaking every hand.
In the republic of poetry,
monks print verses about the night
on boxes of monastery chocolate,
kitchens in restaurants
use odes for recipes
from eel to artichoke,
and poets eat for free.
In the republic of poetry,

poets read to the baboons
at the zoo, and all the primates,
poets and baboons alike, scream for joy.
In the republic of poetry,
poets rent a helicopter
to bombard the national palace
with poems on bookmarks,
and everyone in the courtyard
rushes to grab a poem
fluttering from the sky,
blinded by weeping.
In the republic of poetry,
the guard at the airport
will not allow you to leave the country
until you declaim a poem for her
and she says *Ah! Beautiful*.

** When I heard Mr. Espada perform this poem he made sure the audience knew that everything in it was actually true and did happen.*

all of our knowledge, expertise, and creativity. When we do this our impact is exponential. It is 10 to the 500th power. It becomes a number we can't pronounce.

END NOTE

We have to remember that the world we seek to create we have yet to experience. We've never lived in that world — it exists only in our hearts and in our dreams. The world we seek to create comes from our imagination. So it is important that we also create the opportunities to feel and hear and smell that world. To keep our mind's eye on the prize.

At left is a poem by Martín Espada that brings to life a place called the Republic of Poetry. It was a place he experienced after being a part of a poets' gathering on the 100th anniversary of Pablo Neruda's birth in Chile. What does the Republic of Social Justice, that is funded from the grassroots, look and feel and smell like? I hope this poem and this conference help you imagine the world we are trying to create.

ROBBY RODRIGUEZ IS THE EXECUTIVE DIRECTOR OF THE SOUTHWEST ORGANIZING PROJECT



Katherine Acey

Putting the Movement First

I have been a fundraiser for nearly three decades, but I fancy myself an activist, organizer, political thinker, manager, leader of sorts — they all have become inseparable identities for me. There have been times when, called a fundraiser to my face, I've even cringed, felt a jab to the heart. Why? I didn't want to be seen only as a fundraiser. I wanted to be seen as a political being doing work to change the world in some small, significant way. I, like many others, had unconsciously associated this very important political act — fundraising — as devoid of politics, lacking substance, not the real work — the side dish. Me, a one-dimensional, technical functionary? Never. But I got through that phase. I know that fundraising is an important and essential part of my goal to actively seek social change in the world and a redistribution of resources, including cash.

At the last Raising Change Conference, Sonya Garcia-Ulibarri said, "You do not have to sacrifice your politics to fundraise. You have to fundraise in order to live out your politics." Embracing that simple principle takes work, demands intentional practice for the individual and for any social change organization or group. It means undoing deeply entrenched attitudes that separate our work into differently valued compartments, which serves to undermine the social change we so passionately pursue.

How can we begin to make some small shifts in how we think about and structure our work so that fundraising is cast as a key component rather than an appendage of our social change work? We may have to experience some personal discomfort, deal front-on with contradictions, as we do in all aspects of our political work.

There are small, incremental ways that we can shift the cultures of our organizations and even the functions of our various positions — volunteer or paid staff — so that the various functions that go on in our organizations — fundraising, program work, organizing — inform and support each other. We have to get over our feelings about not liking/wanting/knowing how to ask for money and that asking is only for the bold and gifted few.

Everyone — from the bookkeeper to the office manager to the organizer and the person who has the title of fundraiser — can and should be raising money. This applies to groups with no staff, too. It is not only about the fundraising committee bringing in the dough.

I am not suggesting that everyone do everything the same or spend the same amount of time doing the core functions, including fundraising. That's not efficient or effective. What I am suggesting is what Sonya instructed: "We have to fundraise in order live out our politics," and that we make space within organizations and our prescribed roles to see it and live it as an act of organizing and engagement.

A light bulb went off at the Astraea Foundation, where I work, this past year when we decided that our grants programs should collaborate with grantee and donor and communication projects to inform and *support* the fundraising efforts. This may seem obvious, but there's a subtle, important shift of emphasis in that statement. More often than not the dominant thinking is that fundraising supports the program. In reality both things are true.

We need to pause and think about what stops us from shifting our thinking and how we structure our work. No time, too much pressure to do too much, and so on, are no longer, if they ever were, sufficient reasons. Together we can help each other see some different ways forward.

One example at Astraea is our annual house party fundraiser. Everyone on staff does something to make it happen, and *everyone* asks friends, colleagues, and current Astraea members for a gift, whether they can attend or not.

People feel good about working as a team and seeing the results in terms of dollars and people supporting the organization.

When we make a thoughtful and intentional decision to see fundraising as integral to our work it can and does bring results. The more people we have asking for money — gifts of all sizes — the better chance we have of reaching more people. If we reach more people, we will get more money. Most of us, as generous and political as we are, don't give unless asked.

Imagine the results if we behaved as if fundraising was an integral part of our organizing, that donors and constituents were one — ready to be mobilized at any moment. I would trade any one big gift from an individual or a foundation (and I like big gifts) for smaller gifts from hundreds of people.

We face inherent dilemmas and contradictions when we talk about fundraising for social change and building a social justice feminist movement. One major contradiction for nonprofits (and public foundations like Astraea that fundraise for their budget) is that we are simultaneously trying to build a movement as we build institutions. While many of us may feel that we are building the institution to build the movement, there are hard realities that we have to resolve. We believe that the institution is just a vehicle to achieve a greater good, and we know we are in constant peril of its taking on a life of its own. In doing all we need to keep those doors open, the mission and the vision to support movement building can sometimes disappear from focus.

How many of us have had felt we had to distinguish our groups by saying we are the first, we are the only, we are the biggest, we do it the best, as opposed to admitting that we would like to be out of business in ten years and here's our plan to do that? How many of us realize that we can't move ahead without these five or ten other groups moving with us?

The way nonprofits are structured, including public foundations of which Astraea is a part, is that we work mostly alone, perhaps occasionally sharing information, networking, or occasionally working on a project together. There are not many organizations whose primary goal is to collaborate and of those that do collaborate, few have a well-thought-out strategy for it, including fundraising. Can we break out of this old model? It's a direct hindrance to movement building, which is all about collaboration and collective process.

Just as we're at a moment of possibility for political change, let's keep our hearts and minds open to change within ourselves, our organizations, our movements. Let's each of us resist the "Yes, but" when a new idea comes up that feels hard and instead figure out how to make it possible and who needs to be at the table. Let us use the power we have in order to get all the power and money that is needed to transform — not merely make minor adjustments — to our world. **GFJ**

KATHERINE ACEY IS EXECUTIVE DIRECTOR OF THE ASTRAEA LESBIAN FOUNDATION FOR JUSTICE.

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Does Fundraising *Cost Too Much?*

BY MAL WARWICK

As a topic of discussion at a party, the cost of fundraising is just as likely to set tempers flaring as politics or religion. Wise hands in the nonprofit world have long since learned not to raise the subject in polite company. They know that:

- *Donors think fundraising shouldn't cost more than a few cents on the dollar* — if, indeed, they're willing to concede there are any legitimate fundraising costs at all.

- *Fundraisers think they could raise lots more money if only they had greater resources to work with. In other words, the cost of fundraising will be a lot more than a few cents on the dollar* — even if only temporarily. Thirty cents, maybe, in some nonprofits. Perhaps fifty cents or more in others.

- *Critics of the nonprofit sector* — including some state charities regulators, legislators, and self-appointed watchdog groups — think there should be across-the-board limits on fundraising costs. A maximum of forty cents on the dollar, if you listen to some, while others say ten or twenty.

What's the right view of this perplexing subject?

Is there any one correct position on fundraising costs?

After all, fundraising should be essentially cost free, shouldn't it? When you strip away the mumbo jumbo about fundraising practices and procedures, and view the philanthropic act in isolation, it all boils down to one person voluntarily giving money to another person (often enough, another volunteer). Why should there be any costs involved in that?

But there are.

Fundraising only starts making sense, in my view, when we recognize this fundamental truth:

Successful fundraising has less to do with money and gifts than with creating and sustaining lasting relationships among people. If you can measure the quality of those relationships, you'll be able to gauge the quality of your fundraising program.

Now I'd like a chance to prove that proposition.

FUNDRAISING & FRIENDRAISING: BUILDING RELATIONSHIPS WITH YOUR DONORS

Two questions:

- *First, how long will it take your organization to fulfill its mission? One month? Six months? A year?*

You say your goals can never truly be reached? That there will never be an end to your mission, whether it is to educate the mind, to ennoble the spirit, or to elevate the quality of our lives? That you envision your organization as an enduring presence, fostering good works for decades to come?

I thought so!

Now for the second question:

- *Who's going to pay for all that work over the years?*

For the next three months — or three years — the answer may be simple. Maybe your most pessimistic financial projections show a clear path ahead for even longer than three years. For example, through a combination of foundation grants, fees for service, and some individual donors, you're confident your work can continue for five or ten years ahead.

Then what happens? After that money runs out, after those donors (whether institutions or individuals) crawl off into the woodwork of other priorities, or go belly up, or die, where will your funding come from?

The answer, of course, lies in some combination of the following sources:

- Repeat gifts from some of the individual donors and institutional funders who've supported you in the past
- Bequests and other planned gifts from some of today's donors
- Gifts from new donors
- Other new sources, such as fees for service or merchandizing, for example

As you consider these four options, you realize you don't really know where your funds will come from in the

future. But you'll have to do several things to keep that cash coming in, year after year:

1. First, your organization must deliver high-quality, cost-effective services that satisfy well-demonstrated needs. Donors want to support worthwhile causes.
2. Second, it's vital you inform your constituents about the importance and the impact of your work. Donors have to know what you've done.
3. Third, you need to foster loyalty among your donors. You'll need their continuing support to underwrite the costs of your work for many years ahead.
4. Fourth, since you understand perfectly that all of today's donors won't go on sending money indefinitely, you'll have to recruit new donors. (Not even the most loyal donor is immortal!)

All this leads us to one simple conclusion: *You can't treat donors as nothing more than sources of money!*

Foundations, corporations, major individual donors, patrons, clients — whoever they are, whatever formal relationship they have to your organization — your donors are never just donors. They can't be defined strictly in terms of their willingness to provide you with financial support. They give — and get — something else besides.

Donors give gifts for a great many reasons — but always because they get something in return. That something is most likely to be intangible (such as self-satisfaction, spiritual fulfillment, pride, or dozens of other feelings). Occasionally, donors are motivated at least in part by more mundane and concrete factors (including public recognition, political influence, access to information, or, occasionally, tax benefits). But there's always something. Usually, it's a combination of factors.

A successful fundraiser begins with the knowledge that all gifts come from people. Fundraising is the process of building relationships with those people — whether a foundation program officer, a Member of Congress, a retired banker ripe for a substantial bequest, or the rank-and-file patrons of a ballet company.

Understanding what makes your donors tick, treating them as the generous friends they are, and attending to all the important details of your relationships with them, just as you would with co-workers or the members of your family — those are the keys to successful fundraising.

You want all your donors to feel you've used their money so well they'll extend their support for years to come — and help you secure additional grants from other foundations, agencies, or corporations.

And you want all your individual donors to feel so good about what you've achieved with their money that they renew their support, year after year — and eventually name you as beneficiaries of their estates.

Some people speak of friendraising, not fundraising. That's what it's all about.

Fundraising is, pure and simple, a matter of making friends.

Since fundraising also (unavoidably) involves money, it's all too easy to fall prey to the notion that its success or failure can be measured in strictly numerical terms.

Not so. Some aspects of fundraising can't be quantified. And sometimes it pays off in a big way to look past the numbers and consider the central role of intangible and emotional factors. If you don't, you can be sure your donors will!

Now, however, it's time to take a look at those numbers. (I can't stall forever!)

WHY FUNDRAISING COSTS VARY

If you were one of those millions of kids who had trouble with fractions and ratios, please swallow your pain (and your pride). The so called "fundraising ratio" — the most widely accepted measure of fundraising performance — isn't really a ratio at all, if you want to get technical about it.

A ratio is usually stated in the form of "two to one" or 2:1.

By contrast, the fundraising "ratio" is merely the number of cents on the dollar that goes into fundraising costs. But sometimes it's also stated as a percentage.

For example, if your fundraising expenses total \$0.20 of every dollar you raise, your fundraising ratio can be presented as 20%. If you spend \$0.40 to raise a dollar, it's 40%.

Now it gets a little more complicated.

The fundraising ratio varies widely from one organization to another — and not just because nonprofits choose different strategies. The ratio is affected by such other factors as the following:

1. The popularity of the cause or issue. If a nonprofit organization must depend on the generosity of just a few zealots rather than gifts from the general public, it's unlikely to match the fundraising performance of the American Red Cross or the Salvation Army.

2. The organization's age. Over time, an organization can establish a track record, build name recognition, and assemble a large list of loyal donors. These things are rarely possible in a nonprofit's first couple of years.

3. Fundraising methods used. The cost of a sumptuous lunch at even the most overpriced Manhattan eatery will be more than offset by a \$10,000,000 endowment gift from a generous luncheon companion. But that \$15 dinner you served to people paying \$25 each didn't stack up quite so well. Neither did those 10,000 fund appeals you mailed at a cost of 50 cents apiece, yielding a grand total of \$3,000 in gifts.

4. How much money the organization raises. Within limits, an institution that raises a great deal of money is likely to do it at a lower cost per dollar than a smaller

nonprofit. Small organizations can't easily achieve economies of scale.

5. The skills and experience of the development department. A well-organized, professionally managed fundraising staff can reasonably be expected to raise money more efficiently than a startup operation or an institution with unseasoned fundraising staff.

6. Competition. If you have to spend thousands on advertising a celebrity golf tournament to get public attention on a weekend when three other charities have scheduled major events, you're suffering from what the business world calls "competition." Though some people in the nonprofit world are squeamish about that word, we are indeed in competition.

7. The character of its constituency. A community action agency serving poor people will have a rougher time raising money than the art museum in the same city. Most well-to-do folks may identify with the museum. Few will feel they have a stake in a community action agency unless they're involved as board members or volunteers.

8. The charisma of its leader. If your boss is Lance Armstrong or Oprah Winfrey, your organization has a big advantage in presenting itself to the public. Outstanding leaders sometimes attract support regardless of the specific character of their work. Many people welcome opportunities to identify with charismatic figures.

9. The zeal of the fundraiser. How many universities have gone "over the top" against all odds in extraordinarily ambitious capital campaigns because of the president's passionate commitment to reach the goal? How many churches and hospital wings have been built because of the grit and persistence of a single-minded campaign chair? The difference a dedicated leader can make is incalculable!

These are among the many reasons that the fundraising ratio may vary from one organization to another. That's why I have little patience for the rigid, one-size-fits-all approach that some legislators, regulators, and charitable watchdogs want to bring to this question.

For example, the state of California (like other states before it) enacted legislation not too many years ago that would penalize charities if they spent more than \$0.50 to raise a dollar. That law was contested in court and was abandoned as unconstitutional by the state's attorney general long before the case went to trial.

The statute violated charities' free speech. But as far as I'm concerned, it's far worse that the law was unreasonable. For some organizations, at some stages in their development, it costs more than \$0.50 to raise a dollar. There's just no getting around that.

But the BBB Wise Giving Alliance, one of the country's most visible watchdog groups, takes a different perspective. In its "Standards for Charity Accountability," the BBB states:

To meet these standards, the charitable organization shall:

- 8. Spend at least 65% of its total expenses on program activities;*
- 9. Spend no more than 35% of related contributions on fund raising. Related contributions include donations, legacies, and other gifts received as a result of fund raising efforts.*

Charity Navigator, which bills itself as "America's premier independent charity evaluator," takes a similar view. In explaining the complex rating system on which it bases its ratings, Charity Navigator says, "We believe that those spending less than a third of their budget on program expenses are simply not living up to their missions." However, in directly addressing an organization's fundraising costs on a sliding scale, Charity Navigator awards a perfect score only to those nonprofits whose fundraising costs are equal to less than 10% of the amount they spend on program activities. Those who spend more than 25% of that amount receive a score of zero. (The standards are slightly less stringent for public broadcasters and media organizations because "they use expensive air time to raise money.")

In 1994, the Association of Fundraising Professionals (AFP), then the National Society of Fund Raising Executives, convened a task force to study the cost of fundraising. In summarizing its preliminary report (September 30, 1994), the task force wrote:

The best way to ask the question "What does it cost to raise a dollar?" might well be "What do we get back from investing in fund raising?" Information about results achieved, the cost to achieve them, understanding where improvements can be made, etc., may be more important than comparison to an arbitrary "bottom line" percentage. Not for profit organizations are no more alike in how they provide their client services than are their fund raising programs; organizations should not expect results to be alike either. It is the responsibility of the board of directors to decide the level of return on investment that is best acceptable to that organization to achieve the established financial goals. They can then establish their own standards of performance to guide them in managing the budget allocated for fund raising results.

Though this statement is now nearly 15 years old, there is no more up-to-date position on fundraising costs to be found on the AFP Web site. As you might guess by now, this view is consistent with my own. The only generalization that can truly be made about the "right" level of fundraising efficiency is, "It depends." **GFJ**

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Raising Money in December: *Some Myths & Some Methods*



BY KIM KLEIN

There is a popular myth in fundraising circles that December is a great time to raise money and that people give away more, if not most, of the money they are going to donate in a year during this last month. Grassroots groups will meet in October or November to discuss how to “take advantage” of the winter holidays, often emerging frustrated because they haven’t come up with anything brilliant.

Like most myths, the myth of December giving has some elements of truth. December is a great month to raise money. In this way, it is strikingly similar to the other eleven months of the year.

Some people do give away most of the money they will donate in a year in December. Sometimes these are very wealthy people who are waiting to see how the stock market has done and which stocks they should donate to get the best tax advantage. Self-employed people with incomes that vary widely from month to month may also wait until year’s end to get a clear sense of their financial picture.

However, there are also some serious fallacies to the myth of December as the best fundraising month. To counter these fallacies, here are some facts:

December is actually a very competitive month to raise money, particularly among social service agencies, as the needs of the poor, homeless, and hungry tend to be highlighted at this time of year. December fundraising also competes with the consumer gift-buying frenzy for the religious and cultural holidays that fall during this month.

For every person who waits until the holidays to make their major giving decisions, including wealthy people, many more have already given away all that they are going to give. In fact, few people of any income bracket or level of giving make all their charitable gifts in any one time period. Many people give away money as they are asked for it and as they have it. People who are thoughtful and

systematic about giving often deliberately spread their donations over the whole year in order to be able to give away the amount they want without developing a cash flow problem.

In terms of the amount of fundraising work that can be accomplished, December is a short month. Very little actual work gets done between December 15 and January 6. Many nonprofits close during some of this time, and a good cross section of our vendors, printers, and IT consultants use this time for vacation. Volunteers are also hard to mobilize during this time.

Finally, this year, many people will have spent a good deal of their money on the presidential campaign or hotly contested local campaigns, so this December may be thinner than usual for charitable giving.

HOW TO RAISE MONEY THIS DECEMBER

If your organization wants to take advantage of December by selling calendars, cars, or running a year-end major gifts campaign, you should begin planning now for 2009. You have missed your chance for this year. The six suggestions in this article are for groups that either did not get around to such planning, didn’t know what to plan, or would like to raise even more money than their plans yielded so far.

The following fundraising ideas can be carried out any time after the fourth week in November.

Last-Minute-Shopper Special

Either send a letter or use e-mail to suggest gifts to your organization instead of material presents to family and friends. If you are using a letter, send it out in the last week of November. E-mail can be sent in early December, with a reminder e-mail sent again around December 20. The content of both the e-mail and the letter can be similar to the following:

Dear Friend,

It's December again, and if you are like me, you are wishing you had started your holiday shopping earlier. Buying presents for friends at this time of year is not fun because I am short on both time and ideas. Some friends are particularly hard to give gifts to because they don't seem to want or need anything. I can't buy them a CD because they download everything from the Internet, I can't buy them another book because they have decided to only use the public library, and I can't make them anything by hand because I can barely boil water.

This year, I decided to give many people on my holiday list a glimpse into People For Good. I serve on the board and donate money and time to this group because I am convinced that the work we are doing is making our community a better place to live. Most of my friends also want a better world, so I am giving a gift to People for Good in their name.

Will you join me? Simply send us a donation in the name of a friend, family member, or co-worker. We will send them a lovely card (or e-card) telling them about your gift. We will also send them our quarterly newsletter (or monthly e-newsletter). Toward the end of next year, we will ask them if they want to make their own gift to People for Good. They will receive no other solicitations from us unless they make their own gift.

You can give any amount. I have given what I would have spent on a present for each of these friends. You can give as many or as few gifts as you wish.

A donation to People for Good in the name of a friend is perfect for:

- Someone who wants to make our community more livable for everyone
- Someone who "has everything" (or even most things)
- Someone who always mentions seeing our name in the media or forwards blogs with our work mentioned in them

To take advantage of this easy gift-giving idea, just fill out the enclosed form and return it with your check or credit card information (or, please fill out the online form and pay online).

Best wishes for the holiday season,
Sonia Navarro, Board Chair

P.S. This is the perfect gift for people who have birthdays or anniversaries in December also. Feel free to write in any celebration you want for each friend.

The card or letter to the recipient of the gift might read as follows:

Dear Mr. Huang,

Irene Chao has made a donation in your name to People for Good as her holiday season gift to you. Irene may have spoken to you about our group, but let me tell you a little more.

We believe (*Mission statement here*). Our current goals are (*three short sentences*).

In 2009, we will intensify our work on *XYZ issue* with the addition of a drop-in center/public policy analyst/letter-writing campaign.

You will begin receiving our newsletter early next year, which will keep you up to date on our work. Please feel free to call or drop by our office. For a weekly update as well as more in-depth analysis, please visit our website at www.goodfight.org

On behalf of Irene and all of us at People for Good, we wish you happy holidays and a healthy and peaceful New Year.

About 5 percent of your donors will take advantage of this offer; some of them may donate a good deal of money. Some groups have had donors give 20 or more gifts and donate up to \$1,000. Many people will give one or two gifts and donate \$50. Further, long after December, people will call to see if they can use the form for birthdays, weddings, memorials, or anniversaries.

Make sure the names of the gift receivers are entered into your database and that they are solicited for renewal next year. Make sure they receive the newsletter during this first year, but do not send a solicitation for renewal until about ten months after this gift.

Hold an Open House

An open house during the holiday season can be a nice benefit for all donors or just for long-time donors or major donors. If you do invite all

SAMPLE GIFT FORM

I would like to make a gift to the following people in the form of a contribution to People for Good:

1. NAME _____ E-MAIL _____

ADDRESS _____ CITY _____ STATE _____ ZIP _____

PLEASE CHECK WHICH HOLIDAY IS BEING CELEBRATED: CHANUKAH CHRISTMAS

KAWNZAA WINTER SOLSTICE OTHER _____.

If you don't specify, we will use the generic "Holiday Season."

2. NAME _____ E-MAIL _____

ADDRESS _____ CITY _____ STATE _____ ZIP _____

PLEASE CHECK WHICH HOLIDAY IS BEING CELEBRATED: CHANUKAH CHRISTMAS

KAWNZAA WINTER SOLSTICE OTHER _____.

If you don't specify, we will use the generic "Holiday Season."

3. NAME _____ E-MAIL _____

ADDRESS _____ CITY _____ STATE _____ ZIP _____

PLEASE CHECK WHICH HOLIDAY IS BEING CELEBRATED: CHANUKAH CHRISTMAS

KAWNZAA WINTER SOLSTICE OTHER _____.

If you don't specify, we will use the generic "Holiday Season."

your donors, also invite funders, press, volunteers, and anyone else who has helped you during the year. Make a simple and inexpensive flier for an invitation that people can hang on their refrigerator or office bulletin board. Hold the open house on a weeknight from 5:30–8:00 PM so people can come right from work.

Be sure that volunteers from your board or staff are assigned to circulate and talk with people during the open house. No one should come to this event and stand alone. There should be someone to welcome everyone at the door, a volunteer stationed at the food table to strike up conversations, and “roving greeters” who go up to people and introduce themselves. These volunteers should meet as many people as they can and learn their names.

Have volunteers carry a small notebook or index cards in their pockets. If someone expresses an interest in something related to the group, the volunteer should make a note of their name and e-mail and offer to send them more information or to invite them to the next meeting, or whatever action would be appropriate.

If you have T-shirts, books, calendars, or other products that you normally sell, you can display them for sale as holiday gifts. Have wrapping paper and ribbon available so that people can get their purchases wrapped on the spot. Also, use this time to create and display a “wish list” of things you need for your office. (In an informal and not very thorough survey last year of open house “Wish lists,” I found out the following had been donated: a meeting table and four chairs, a security system, two desks, a bulletin board, three easels, ten pounds of coffee and a new coffee maker, and a small refrigerator.)

It is not necessary to have a formal program during the open house, but if you wish to do so, make sure it is not more than 20 minutes long. During the program, take the opportunity to thank donors, to introduce new staff and board members, and to discuss exciting plans for next year. Tell people how they can get involved, if appropriate.

After the open house, everyone who greeted people should get together and make a list of all the people they met and any interesting or useful things they learned from those who attended. If anyone was promised something, it should be sent right away.

The purpose of an open house is not to raise money but to thank people and build community among your supporters. It also provides good practice for board

members to talk to donors without having to ask them for money.

You may also get some interesting offers from the people who attend your open house. One organization whose offices have lots of windows find that at certain times of sunny days, the sun shines in fiercely. People had hung sheets and mounted pieces of cardboard to keep the sun off their computer screens. Seeing this, a guest at the group’s open house bought the group custom-fitting window shades that can be opened from the bottom or the top and thus be adjusted to ward off the sun without dimming all the light.

At another organization, a guest who managed a day-care center said that she felt they would get greater turnout to their evening meetings if they offered childcare. She offered to provide it for free during a couple of meetings to test out the idea. As it turned out, attendance did go up at meetings and now the organization provides childcare for all its meetings.

Send Holiday Cards

The chair of the board or the executive director should send holiday cards to board members, volunteers, staff, and anyone else who has been closely involved and helpful to your work this year. The cards should thank them for what they have done — a foundation program officer who went out of her way to help strengthen your proposal, a computer technician who didn’t charge for repairing your printer when you jammed it by using cheap labels, the people at the Senior Center who get your newsletter ready for bulk mailing, and so on. Handwrite these cards. Your thank

you does not have to be long. Two scribbled sentences that are personal are vastly preferable to a flowery computer-generated letter. Always send these cards by snail mail. For donors concerned about paper, use either 100% PCW (post-consumer waste) or explore using straw, hemp, or kenaf paper as card stock.

Check for Renewals and Pledges

Scroll through your database and make sure all your major donors (people giving \$250 and up) have been asked to renew their gift sometime during the past 11 months. If anyone hasn’t been contacted, figure out why and figure out who can contact them by the 15th of December. Particularly be sure to contact anyone who pledged a gift and hasn’t paid it. Our instinct is to think that people don’t

The purpose of an open house is not to raise money but to thank people and build community among your supporters.

Our instinct is to think that people don’t want to pay their pledge or will feel offended if we remind them, but the contrary is true.

want to pay their pledge or will feel offended if we remind them, but the contrary is true. You will look like you value their commitment and need their money, and they may well have forgotten the pledge or lost the return envelope.

If you have time, you may even want to conduct a “renew-a-thon” phone campaign in the last two weeks of December, phoning all the people who have not given at all in 2008. You will mostly be leaving messages, but you may have some great conversations with donors who have moved, or just got behind in all their giving, or who have a problem with some aspect of your program that you can sort out with them.

Finally, be sure to e-mail anyone you haven’t received a gift from in the last 11 months or so, with a short message: “You can help us start 2009 strong and vital with a year-end gift. Take a moment right now and click onto our website to make your gift today. Thanks!” You can add one short paragraph about what you will be doing in 2009, but be brief and upbeat. You are just trying to capture all gifts from people who have been too busy to read much of what you have written the rest of the year.

Be Sure Someone Is in Your Office December 30 & 31

Even though I said earlier that it is a myth that most people do all their giving in December, it is not a myth that some people do all their giving the last two days of December. They call and e-mail needing to know how to give you stock (which must be recorded as received in the tax year for which the person wants to claim the deduction) or to ask if they put a check in the mail “today” can they claim the deduction for 2008, even though you

will get it in 2009 (answer: Yes, as long as you get the check on or before January 15), or wondering if you would like some frequent flier miles that are expiring (answer: maybe, if they are transferable), or.... I know an organization that

received a \$50,000 gift of stock because the executive director was still in her office at 4:30 on New Year’s Eve. The donor said, “I would prefer to give to another group, but you are open and I need to make this gift.”

I know an organization that received a \$50,000 gift of stock because the executive director was still in her office at 4:30 on New Year’s Eve.

Treat Yourself to a Clean and Neat Working Environment

This, too, will help your fundraising: Clean up your office, clean out your desk, get caught up on filing, data entry, and prospect research. Start the new year with only the paper and computer files that you need and use. Also, if you really need some piece of equipment that will make your life much easier, buy it for yourself (or plan to buy it on sale right after the new year). So many small organizations lose valuable work time because they are too cheap to buy ergonomic chairs or one more printer or a heater or fan.

A FINAL SUGGESTION

These six suggestions will help you with fundraising during the holiday season. My final suggestion will help you stay in fundraising for the long haul: Take some time off. Do some things you like to do — read a mystery novel, go to the planetarium, see an old movie. Spend time with family, friends, and pets. Forget about work for a few days. Come back after New Year’s rested, refreshed, and ready to raise money in January. **GF**

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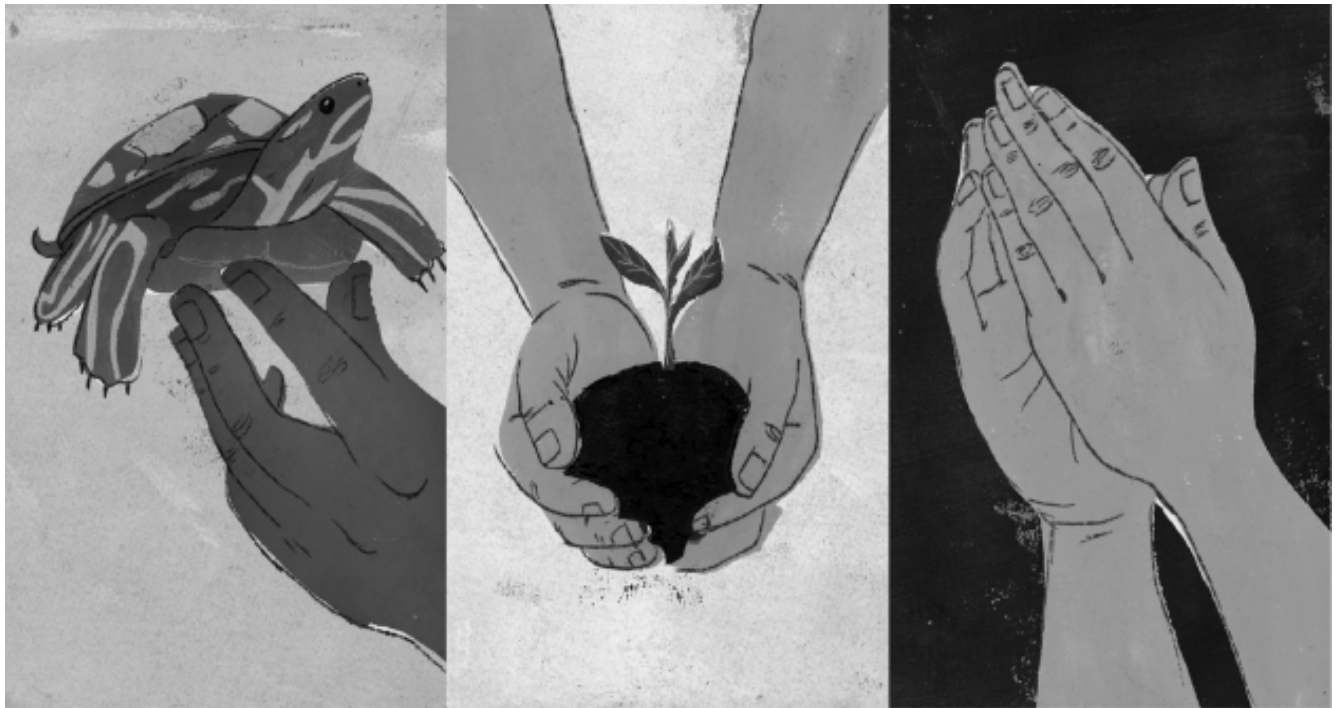
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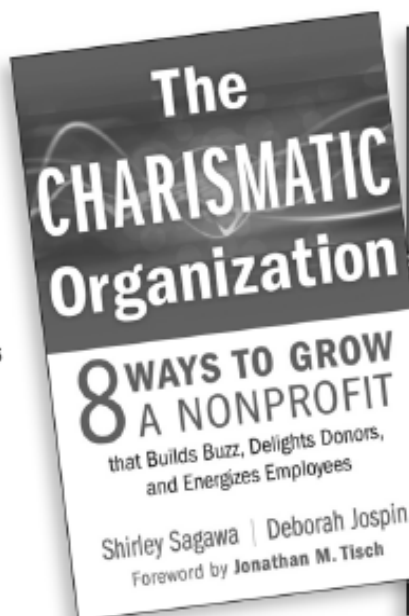


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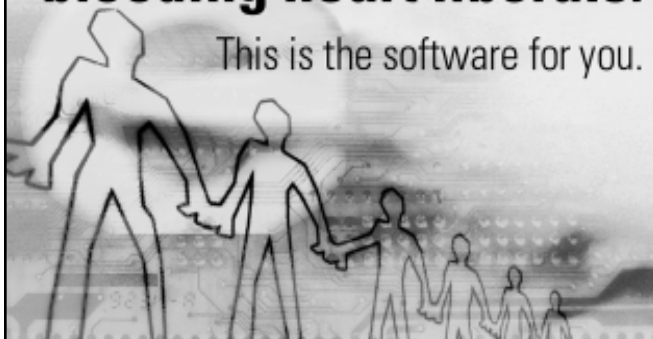
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