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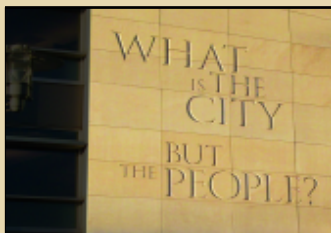
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The *Grassroots Fundraising Journal* is published six times a year: January/February, March/April, May/June, July/August, September/October, November/December.

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www.grassrootsfundraising.org

Periodicals Postage at Oakland CA 94615
023-243 and at additional mailing offices

Postmaster — send address changes to:
1904 Franklin Street, Suite 705
Oakland CA 94612

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ISSN No. 0740-4832



LETTER FROM THE EXECUTIVE DIRECTOR

PRISCILLA HUNG



Despite the tough times we are facing as a sector and a movement, I am thankful and honored to become Executive Director of GIFT. As more of my friends and colleagues lose their jobs, it is no small blessing to have a job that I enjoy. But, more than that, this is also a particularly exciting time, as the challenges give us the chance to think differently about fundraising and the nonprofit sector.

Some questions that come to mind now are: Who should be funding the nonprofit sector? Should we focus on how our individual organizations can do a better job of raising money, or should we be organizing as a sector to demand more government support and accountability to our communities? Is it acceptable to take funding from a corporation whose CEO makes an exorbitant salary or that may be receiving government bailout funds and laying off workers? Should the 5 percent payout rate be increased for foundations that are sitting on huge assets?

To explore these and other questions and respond to the current economic meltdown, GIFT has been meeting with other organizations to find ways to move forward. We are co-hosting monthly discussions among local social justice fundraisers to share fundraising strategies. We co-convened a gathering of social justice funders and capacity-builders in New York (for more, visit our website). We participated in a discussion among funders and capacity-builders in San Francisco on how to develop conversations among nonprofits, funders, and government officials. By the time you read this, I'll have just returned from a convening in Egypt on how philanthropy can advance a social justice agenda on an international scale.

It is important to continue coming together as fundraisers and activists to hone our visions of the world that we want and to advocate for change. Many organizations are working together and with their constituencies to put forth issue agendas for President Obama and his team on healthcare, the environment, the rights of LGBT people, the wars in the Middle East, and much more. How should this work be paid for? We as fundraisers need to also take our seat at the table.

It is also important as a sector not to become divided by competing for dollars. Organizations that are financially secure can help others by sharing resources and knowledge, or even collaborating on fundraising. Groups that are struggling to survive can overcome tendencies to withdraw and mask their vulnerability, and instead allow themselves to ask for help or envision new organizational forms. GIFT is here to help groups reach out to their supporters and focus on building authentic relationships with them.

A common thread through all of the articles in this issue is partnership, a fitting theme for a time when we must join forces. Mike Roque, GIFT's first director, shares his perspective on how nonprofits and local government can work together to fund community projects. Jennifer Pelton describes how executive directors, development directors, program staff, and board members can work together in partnership to create a healthy fundraising culture and work environment. And Kim Klein discusses how organizations can use these challenging economic times to work in closer partnership with their donors, including increasing communication and transparency, and making sure donors know that they're needed.

Partnership is important here at GIFT as well. The success of our work depends on all of your participation as fundraisers, readers, writers, and donors. Thank you for supporting my directorship; I look forward to working with you to strengthen the movement for social justice during these exciting times.



Looking Downtown

HOW NONPROFITS CAN PARTNER WITH LOCAL GOVERNMENTS

BY MIKE ROQUE

Starting out as a community organizer and then working for a radical community foundation, I never dreamed I'd actually be a government insider. In most cases, the work I did targeted local government with a list of demands and criticisms. Surely, we knew better than government how to do our work, and we never even considered it possible to partner with the government to achieve our goals. They were the people we were fighting for change.

Five years ago, the city of Denver elected John Hickenlooper as its mayor. Prior to his campaign, he had

Many federal grants are only available to units of local government, but these units can then subcontract with local nonprofit organizations.

been very involved in the nonprofit sector, starting local organizations and serving on many boards of directors and committees. I first met him almost 20 years ago when, as a member of the board of the Chinook Fund, one of the Funding Exchange network of community foundations, he hired me as executive director of the Fund. Once he became mayor, Hickenlooper and I had many conversations about how to effect social change, and we recognized that no one sector — government, for-profit, or nonprofit — can solve large social issues alone. Here in Denver, we felt that the mayor's new political status was the perfect catalyst to bring the sectors together. To help do so, we created the Denver Office of Strategic Partnerships (DOSPP) with the mission of helping the city partner with local nonprofits. I was appointed by the mayor as its director.

As the liaison between the City of Denver and local nonprofit organizations, the Denver Office of Strategic

Partnerships looks for opportunities to build these partnerships. In 2008, we brought an additional \$20 million in federal and national foundation grants to the city and local nonprofits by building partnerships between the city and nonprofits on issues such as youth mentoring, teen pregnancy prevention, affordable housing, and the environment.

Similarly, your nonprofit can look to partner with your local government for opportunities to work on issues of importance to your agency or group and constituency.

Partnering with local government and one or more nonprofit organizations will enhance your chances of winning a federal or private foundation grant. Many federal grants are only available to units of local government, but these units can then subcontract with local nonprofit organizations to get the project done. In this

win-win situation, the local government takes responsibility for the burdensome federal financial reporting and audit requirements while the local nonprofits carry out the on-the-ground work. Conversely, there are some grants that only a nonprofit is eligible to receive but that it is more likely to win if it proposes working in partnership with local government to carry out the work.

In looking at examples of other cities that were partnering with local nonprofit organizations, such as Seattle, New York City, Detroit, and Lincoln, Nebraska, we discovered that each sector has its advantages and drawbacks. For example, governments move very slowly, but they also have the ability to do large-scale projects, such as creating parks and building roads, and they have access to large sums of taxpayer dollars. The for-profit sector is amazingly versatile, fast, and innovative but not always the most socially conscious or accountable. The nonprofit sector can do more with less and addresses social issues

such as AIDS, homelessness, and domestic violence when no one else will. But as we all know, the sector is terribly undercapitalized and rife with overlap and duplication of services. We are learning that, by bringing these sectors together to play off each other's strengths, it is possible to create innovative, collaborative, and system-changing solutions to some of the toughest social issues.

Denver's Road Home, Mayor Hickenlooper's Ten-Year Plan to End Homelessness, has been a great example of the three sectors coming together with tremendous results. The city of Denver has provided the leadership in bringing together the sectors, Mile High United Way is serving as the fiscal agent, 19 local funders have provided financial support, and dozens of homeless providers are working together as never before to ensure wraparound services for the homeless. In the first three years of this effort, chronic homelessness has decreased by 35 percent, while the public awareness of homelessness has risen substantially.

As governments cut back in providing direct services, they are relying on local nonprofits to do the work and helping them get the funds so that they can. Although organizing and activist groups have been less likely to seek partnerships with government entities, they may want to take another look at the opportunities that exist.

I realize that organizing groups may need to target government officials when conducting a campaign. But there are always opportunities to partner with govern-

Although organizing and activist groups have been less likely to seek partnerships with government entities, they may want to take another look at the opportunities that exist.

ment once the campaign is over. Often, in the midst of a campaign you will discover resources that the government may have that could be helpful to you, such as funding or technical resources. I have seen successful organizing campaigns end with the organization and government agency jointly seeking and receiving funding for affordable housing development. Just because the government may be the target of your organizing doesn't mean they can't, at the end of your campaign, be an ally in your work.

FIVE TIPS

In this article, I offer five practical tips from an outsider-turned-insider on how to put your group in a position to partner with your local, state, or federal government to achieve your goals.

1. Research Your Local Government Operations

First, find out how your local government operates and where it gets the money to pay for everything it does, besides all your parking tickets. Because local governments utilize taxpayer dollars, this information is readily available. Budgets are a matter of public record and can be accessed at government offices; most are also now available online. These budgets tend to be large documents of

As governments cut back in providing direct services, they are relying on local nonprofits to do the work.

well over 100 pages (the City of Denver 2009 budget is more than 600 pages), but most are broken down by city agency or program categories. It is important to know which programs most directly affect your constituency and where the funds for those programs come from.

Knowing where the money comes from will help you discover how flexible these dollars can be. With a little bit of research or by asking the local program director, you can get a copy of the program guidelines for a particular program. For federally funded projects, you can also get program guidelines by going to the federal agency that administers the funds. Most local governments have discretion about how federal money gets spent and can often transfer dollars from one program to another.

Try to find out how other cities and counties are using the types of funds most relevant to your group and let your local government know about what others are doing.

You might help spur your local government agencies to explore new ways to use funds by telling them about Harvard University's annual Innovations in Govern-

ment Awards, which recognize governments for innovative approaches to governance.

See how you can get involved in your local government's process for developing their budget. Often, it takes several months, many public hearings and meetings, and various revisions before the final budget is approved. To get your programs supported, your organization wants to be in the process as early as possible. You need to be in discussion with your political leaders when preliminary budgets are getting put together. The budget will go through many revisions before it is finally approved, and if you are not at the table during these discussions you will be left out.

Many nonprofit groups have conducted successful organizing campaigns around getting Community Development Block Grants (CDBG) and Temporary Assistance

to Needy Families (TANF) dollars, both of which are federal pass-through programs in which federal dollars are given to states or counties for distribution. CDBG funds have been used by nonprofits to purchase and renovate buildings, spur economic development efforts, and build neighborhood infrastructure such as roads and parks. TANF dollars can be used for preventive efforts such as preventing teen pregnancy, youth mentoring, and afterschool programs.

But there are many other pots of money that cities and counties get that can be used to support your work, whether it is providing direct services to the needy or building infrastructure such as roads, parks, or businesses in your communities. It is important to know where these funds come from, how much your local government gets (they are often distributed by formula), what projects are eligible under each program, and when and how decisions are made.

Another thing you want to learn is how your local government works: how decisions get made and who makes those decisions. What agencies make up your city, county, or state government? Who hires or appoints the agency managers? Do you have an elected mayor or city supervisor? How are city council or county commissioner seats selected — by district or at-large or a combination of both? Again, you can find most of this information at your city or county's website. Often city councils have work groups that meet to discuss specific functions of the city, such as youth development, parks, and city infrastructure. All regular meetings of public officials are open to the public. In addition, most of these meetings are now accessible via public access television or through your local government's website. In Denver, you can view the meetings live over the Web or access the library of public meetings on the city's website. You should plan to be present for the meetings that are related to your issues when they allow for public input.

Once you find out what agencies comprise your local government, you want to get a list of all the agency managers and deputy managers and plan to meet with those most relevant to your issues. You can usually find managers' names on the government website as well.

Try to get as much information about the managers and deputy managers as you can before meeting with them: What are their backgrounds, where did they go to school, where did they come from? Many of these managers have nonprofit backgrounds. Find out if they serve on any nonprofit boards of directors.

2. Begin to Make Yourself Known to Your Local Government

Now that you know what agencies comprise your local government and who the agency heads are, you want to look for allies in your constituency. You may not

have any agency managers or deputy managers in your constituency, but there may be someone who works for the city or county government who will likely know others in the bureaucracy. Ask them to walk you through their agency and name the higher-ups. Ask them if their agency has a strategic plan, organizational chart, or agency roster that will give you insight into how it works. Ask them for their feelings about the agency, their supervisors, and the local government. This will give you a good sense of morale and other issues in the agency.

When you have this information, set up a meeting with the appropriate agency managers or elected officials

Determine the meetings that most affect your constituency and plan to have representatives attend.

to introduce your organization, let them know about the good work you do, and explore ways you might help them meet their goals.

These people are experts in their given fields but they are not always comfortable meeting with the community. You want to ask them for their thoughts and plans for their agency and let them know that you are more than willing to work with them to ensure public input into their agency. Let them know about the needs of your constituency and neighborhoods. Show them pictures of your parks and roads and compare them with those in other neighborhoods.

These managers control their agency budgets and are the ones who will be making decisions about who they will work with. If they don't know your agency and its work, your group will not be built into the budget. Often times, agency managers or elected officials will send a representative to meet with you. Do not be offended by this, just see it as an opportunity to educate another person in the government about your work. Always have a packet to send back to the manager or elected official and ask for a formal meeting with the person in the future.

Next, get a list of all the public forums being held by agencies and start attending the meetings that pertain to your issues and giving input. Many public forums have very few members of the public showing up, but those who attend help shape public policy and/or funding decisions. Many local governments now conduct public input meetings on budgets, parks, infrastructure, business development, police, zoning issues, animal control, and many other topics. Determine the meetings that most affect your constituency and plan to have representatives attend. Often boards and commissions are formed to oversee the development of policy around specific issues. Make sure that your organization is represented on these boards and commissions. Find out the process for nominating people to these boards and commissions.

You should also attend relevant city council and county commissioner meetings. Most meetings are a matter of routine business and proclamations, but if you get the meeting agenda in advance you can see if there are items that might affect your agency or constituency. Final funding decisions often must go through this process, and you should be there to comment or make sure changes aren't made that remove needed funding at the last minute. You can also find out if items are being considered that may have dramatic consequences for certain communities, such as zoning changes or opening or closing parks or recreation centers.

Most meetings also include a public comment section on certain items under consideration or just take general comments. You often have to sign up in advance to speak; speakers are sometimes limited in time and/or agency or neighborhood representation. When speaking at these meetings, remember that you are often on television; always address elected officials with formal titles, such as Mr. or Madame President, Councilman Juan Smith — not Juan or Mr. Smith, even if you are personal friends with those you are talking to.

3. Relate to Government People with Respect

The number-one rule about politics, like fundraising and movement building, is that it is all about relationships. As much as politicians may annoy you or move too slowly for you, do not put them on the spot or try to embarrass them. This will only get them upset and get in the way of building a trusting relationship. No one likes to be made a fool of, and if you want to work with people on an ongoing

Knowing how your local government works and where it gets its funding will help your organization serve its constituency.

basis you must build that trust. If you are trying to build relationships with your local government and figure out how to create mutually beneficial partnerships, then you should treat them as you expect them to treat you: with honesty and respect. There are times when a politician or government official may be the target of your organizing campaign, but always try to be respectful. Even though you may disagree on an issue, do not make personal attacks. At the end of your campaign, you may gain a big ally for your work in the future.

Another thing bureaucrats hate is when you go around them. If you are working with someone, don't go around them to their supervisor or someone else whom you see as more powerful. You may get what you need in the short term, but you will break that trusting relationship you worked so hard to build.

Be sure, too, to acknowledge support you get from government people. For example, if a manager or elected official attends one of your functions, such as a fundraiser or other public event, make sure to identify them and thank them for attending. When doing an event where

The number-one rule about politics, like fundraising and movement building, is that it is all about relationships.

you are expecting an elected or appointed official to attend, assign someone to let the MC know that they are in the audience and where they are seated so that they can be properly acknowledged.

4. Understand How Decisions Are Made

In the best of circumstances, major government decisions are made with lots of community input and deliberation. But sometimes, decisions need to be made quickly in response to unexpected dollars or changes in rules. In these cases, your good relationships with city or county officials will pay off. The more they know about your organization and its good work, the more likely they are to give you funding when it unexpectedly becomes available. I have seen situations where one organization was awarded funding for a project but due to unforeseen circumstances was not able to receive the funds. The funds needed to be spent down or contracted by a certain time or they'd be lost, so we quickly reached out to some familiar nonprofits to award the funding. An organization that had spent time getting to know their local government officials received \$250,000 to install a new elevator that made their office fully wheelchair accessible.

It is not uncommon for the federal or state government to tell a local city or county to come up with ideas for projects they would do if several million dollars became available. You need to be ready to seize that kind of opportunity and react quickly and boldly. Think right now about what you would do with an additional \$500,000 or \$1 million. Do you have three or four projects at the ready that you could put into a two- or three-page proposal and implement within one to three months? If you do, tell your friends in government about your ideas. Give them a tour of your organization. Keep your organization and its good work on their minds and they will be more likely to contact you in situations like these.

5. Take Advantage of Resources Other Than Money

We would all like to receive an additional \$1 million quickly, but that kind of windfall may be the exception. However, governments have other resources that nonprofit

organizations can take advantage of. They often make meeting and training space with ample parking and LCD projectors available to nonprofit organizations. They might have surplus computers and office furniture that they could donate to local nonprofits. They have experts on issues such as environmental health, zoning, parks and recreation, finance, economic development, and other issues who are willing to share information and help your organization develop policy positions.

Seek out the people in your local government agencies who are responsible for proposal writing and ask them to keep you in mind for grant opportunities. Also, consider asking the local government to partner with you on a grant proposal for your organization. Often times, having a local government involved in your project adds credibility to your proposal.

Find out what other resources your local government has to offer and start using them. After all, you and your neighbors are paying for them.

CONCLUSION

There are many opportunities to work with your local government. Make sure you know what your government agencies are up to and see to it that they know about your work. When funds become available for a specific project, or a big, government-driven initiative comes on the drawing board, your organization will be well placed to have an inside track to the funds that could help you achieve your mission while working with the government agencies to achieve mutual goals.

That these ideas may not work for every organization, but many nonprofit organizations are losing opportunities

by not even considering the possibility of working with their local government. Even if you decide not to work with your local government, knowing how it works and where it gets its funding will help your organization serve its constituency better. For better or worse, local

Seek out the people in your local government agencies who are responsible for proposal writing and ask them to keep you in mind for grant opportunities.

governments have lots of control over the lives of most people. From developing zoning policies that affect your neighborhoods and deciding where to open or close parks and recreation centers to determining which communities get designated as enterprise zones or business improvement districts, learning how your government works can help your organization achieve its goals.

Don't be afraid to meet with local political leaders, share your work with them, and explore partnership opportunities. At one time, governments were seen as allies in the fight on poverty, racism, and other social ills. With new leadership in Washington and more progressive leaders at the state and local levels, nonprofit organizations once again have the opportunity to work with governments to tackle some of the most intractable issues of our day. Let's show that governments can once again be instruments of good and can partner with local organizations to build a just and equitable society. **GFJ**

MIKE ROQUE IS DIRECTOR OF THE DENVER OFFICE OF STRATEGIC PARTNERSHIPS. BEFORE BECOMING A GOVERNMENT BUREAUCRAT, MIKE WORKED FOR 15 YEARS IN THE NONPROFIT SECTOR AS A COMMUNITY ORGANIZER, FUNDRAISER, AND EXECUTIVE DIRECTOR. HE CAN BE REACHED AT MIKE.ROQUE@DENVERGOV.ORG. A

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A Healthy Workplace + Positive Fundraising Culture = Retention of Fundraising Staff

BY JENNIFER PELTON

I just celebrated five years as Development Director with the Public Justice Center (PJC), a nonprofit in Maryland that uses creative legal strategies to eradicate discrimination and poverty. In the fundraising profession, where burnout is high and studies frequently show that staff turn over every 18 to 24 months on average, this is big news.

This is also big personal news because it marks a different type of work experience for me. During the past five years, I have grown professionally in an increasingly stable organization that continues to inspire me each day. I now understand that organizations that create healthy fundraising cultures — by encouraging creative partnerships and mutual respect among all staff and board members — are those that can reduce fundraiser turnover.

My retention (and satisfaction) is big news for the health of PJC also. The continuity in our fundraising program means stronger relationships with foundation leaders, donors, and other supporters. Certainly, I have not created these relationships alone. I enjoy an active partnership with our executive director, board members, and program staff. Together, we have doubled our donor list, diversified our revenue sources, and heightened our visibility in the community. Finally, because our leaders have not been distracted with finding the next person to fill my post, they have been able to get on with the business of accomplishing our mission. This is the best news.

Organizations
that create
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turnover.

Tatjana Loh is the Director of Development for the Women's Building in San Francisco and she, too, has held her position much longer than anyone in their history. During Tatjana's five-plus years, the Women's Building has evolved from an organization with a "starvation mentality" to one with a solid bottom line and a reserve fund. The impact on the organization has been profound.

Like other "small shop" fundraisers, Tatjana and I each have our share of turnover stories collected from years of service to nonprofits. My experience at PJC has encouraged me to think about what works in a well-oiled nonprofit and how others can learn from this experience. My musings have found me in deep conversation with colleagues from around the country, and with the Small Shop Roundtable, a group of 70+ fundraisers from Baltimore-area organizations. I have rolled these ideas around with John Nethercut, PJC's executive director. I have listened carefully to board members and donors from my organization and others. I have thought about my own experience as a board member and volunteer for other groups. And I have joyfully witnessed the transformation of PJC's program staff as they dipped their toes into the realm of raising money and lived to celebrate it!

I hope these ideas will help you — board members, executive directors, and program staff — understand that fundraising is a team sport, and that employee engagement, contentment and productivity are organization-wide issues. Although this article is written for organizations that may be hiring their first development director, the information here can help any organization that already has a development director develop a more satisfying sense of teamwork and greater productivity among board and staff.

SETTING REASONABLE EXPECTATIONS—OR—GETTING WHAT YOU ASK FOR

Too often, “small shop” fundraisers report that they have been hired and expected to raise a goal that calls for a large increase in funding for the next year, only to learn that the board and executive do not have a solid plan or a history for such a large increase and are expecting the new director of development to do it single-handedly.

Another example of unrealistic expectations was expressed recently by one tired colleague: “Development directors should not be expected to also be communications directors, marketing directors, newsletter writers, board secretaries, capital project leaders, and more...while growing the donor base and doubling the funds raised each year.”

Certainly, in small organizations, fundraisers wear multiple hats, and successful campaigns have elements of marketing, public relations, and special events. Yet the successful nonprofit organization will carefully consider its priorities before dumping too much into one person’s job description. The likelihood of that person being successful is slim, and the risk of turnover great.

Understanding your organization’s expectations for this position will help you craft a clear and appropriate job description, hiring announcement, and initial work plan.

Board members should talk with peers from similar-sized organizations. Listen for clues about how paid fundraisers and boards work successfully together. Listen for potential pitfalls in the relationship. Think about how the board might need to change in order to maximize the addition of a professional fundraiser.

Executive directors need to find out how their peers work with their fundraising staff. Understand how you might grow in your own role if you add the “right” development professional to your team. Know your own strengths and weaknesses around raising funds and consider hiring staff who complement or support your own abilities. Also, be sure to hire someone you want to work with. Successful fundraising requires direct and honest communication, mutual respect and teamwork.

Successful Fundraising requires direct and honest communication, mutual respect and teamwork.

Program staff need to be ready to participate in fundraising efforts. As the keepers of stories and the dreamers of new project ideas, program staff can help the fundraiser attract money and donors to support the work. Talk to your colleagues in other organizations and learn how they participate in the process of raising money.

The executive director, board members, and program staff should share what they have discovered. Then use the

insights gained to create reasonable expectations for the new position. Consider how your organization’s development efforts can evolve, building gradually into a deeply rooted, revenue-generating system more capable of withstanding economic downturns and other nightmares.

If you do this thinking and planning before you have even hired the professional who will help coordinate your efforts you will have begun to create a healthy fundraising culture for them to join.

A GOOD FIT: VALUES AND MISSION

I believe in and understand the work of PJC. I am passionately invested in our vision of creating a more just society. This belief and passion keep me motivated to do my part, which is to coordinate the revenue-generation efforts that support the program staff who work every day toward our mission. When I do my job well, they can do theirs.

I learned the hard way that it is not as easy to raise money for things that don’t fuel the fire in my belly. Beyond the tried-and-true methods to meet the bottom line, fundraising is also an art — one that comes alive when your passion for the mission meets your expertise in technique.

A HEALTHY CULTURE BUILT ON CREATIVE PARTNERSHIPS

John Nethercut says that I brought the notion of a “fundraising culture” to PJC. Essentially, a fundraising culture results from the application of the notion of creative partnerships among the development professional, board members, program staff, and the executive director, as well as with donors, other nonprofits, and community members. Healthy partnerships, fostered in part by the development director, can benefit the organization’s bottom line without compromising its mission.

John and I have reflected on the qualities that make our partnership successful. We genuinely respect each other’s roles within the organization. John expects and trusts me to lead the development efforts and he invests in the infrastructure that we need to be successful. I do not work in a vacuum, alone in the “hole at the end of the hall” that fundraisers joke about. Instead, John and I work in constant partnership. I prepare donor profiles for John’s calls and visits. He reports back and I store that information for later use. He shares opportunities gleaned through professional networks and I research to determine if we will pursue them. We actively co-write grant applications, combining my writing skills with John’s knowledge of program strategies and objectives.

We are not alone in our experience. Tatjana Loh also speaks highly of her partnership with Teresa Mejía, the executive director of the Women’s Building, who creates a work environment where people are empowered and

trusted to do their job. "Teresa assumes everyone's doing their work, without micro managing," Tatjana says. "She monitors and supports us as we need."

Program staff can partner with fundraisers by providing them with access to your day-to-day work. Keep your fundraiser in the loop with regular stories or monthly reports. Understand that donors are not mysterious and distant money machines but are individuals with their own reasons to be committed to the cause. Welcome donors to interact with you or to witness your programs in action.

At PJC, program staff share news by email about clients, project successes, and even setbacks. I use this information in grant reports, solicitation letters, and other communications. This system keeps me well informed and provides fresh examples for storytelling. Often, I share information with donors just because the news is great or relevant to a larger issue of concern in our community, even when there is no specific fundraising goal for doing so beyond building relationships. The more connection our donors feel to our everyday work, the more inclined they will be to support us when we ask them to.

Program staff should make themselves available for conversations with donors. Donors enjoy hearing from those working on the ground and learning about the impact of their gifts. And don't hesitate to ask how donors can help you reach your program goals. More than once at PJC one of our donors became involved in our program work, as when one helped distribute our recent film regarding the rights of homeless children to remain in school.

Board members must, above all else, be honest about their ability, willingness, and commitment to participate in the fundraising process. A successful organization involves board members in a variety of development efforts, from asking for money and reviewing lists of prospects to calling donors simply to say thank you.

The PJC board inspires me with their willingness to help when asked. One important reason for their responsiveness is that I have unfettered access to the board. I am welcomed at every board meeting with ample time on the agenda to review our development efforts. I stay in touch regularly by telephone and email. Organizations that insist on requiring all communications with the board go through the executive director are hobbling the ability of the organization to raise funds and retain development professionals.

Finally, one more plea to all members of the organization: Please include your development director in any

Keep your fundraiser in the loop with regular stories or monthly reports.

meeting that has anything to do with funding or the possibility of funding. I cringe when I hear that a development director is the last to know about a big special event the board has decided must be done within six weeks. I worry about the implications of visiting a major donor without the development director's knowledge. I wonder why fiscal year budgets are created and approved without the development director's input — especially when some unreasonable gap must be filled. The development director must be seen as a crucial partner in every aspect of the work.

INVESTMENT IN TRAINING AND INFRASTRUCTURE

If there is one thing both my employers and I have benefited from in the 15-plus years I have devoted to fundraising, it has been the investment made by each organization in my professional growth. Early in my career, I attended trainings to learn the techniques and methods of fundraising. As I grew more capable and experienced, I began participating in workshops to polish my methods or add creative flair. Lately, I have enjoyed invitations to teach, which adds a deeper element to my professional growth.

I joined the PJC with more than 10 years of fundraising experience. Shortly after, I decided to pursue the Certified Fund Raising Executive (CFRE) standard. This type of advanced training gave me a chance to revisit my fundraising techniques and deepen my work. As I studied for the test, I began to apply fresh ideas and to rethink strategies to help us reach our goals. Rather than spending lots of time on many different strategies, I concentrated on "perfecting" a few tried-and-true methods. Eventually, I began to add new techniques, further enriching our efforts. But my favorite benefit of the CFRE process was the encouragement from my co-workers and board members, and they celebrated with me when I passed the test.

Invest in the fundraising IQ of the entire organization.

Successful organizations grow together in their development efforts. It is important to invest in the fundraising IQ of the entire organization. Formal classroom settings are one approach, but fundraising is as much about on-the-job training, so allow your development director to carefully guide your efforts.

Scripted board members can make thank you calls or write notes on solicitation letters. These activities eventually increase their comfort level with other types of fundraising roles, including directly requesting funds. I work closely with program staff to prepare for donor visits and share strategies for raising funds for new project ideas.

Our executive director has stretched his wings at major gift trainings, implementing the methods he learned.

When all board and staff understand the basics of fundraising, they will see that fundraisers are not magicians who somehow pluck money off a tree. This realization helps create a culture ripe with reasonable expectations and creative partnerships, where everyone has a role to play. Also, development professionals and star board fundraisers do move on. An organization that cultivates a healthy fundraising culture through participation, partnership, and information sharing will be better at weathering these transitions.

It is important to note that investment in human capital is not enough. A successful organization is one that also invests in the appropriate infrastructure required to run an efficient shop, including appropriate donor software and adequate levels of in-house or contractual help.

ESSENTIAL INGREDIENT: WORK-LIFE BALANCE

Perhaps the most important factor in why I have stayed with the same organization for five years has as much to do with not working as with the work.

In general, fundraisers tend to try to do too much. We will strive to meet goals even if they are unreasonable. We will take it all on, jumping from one fire into another without a break. This is especially true when we work in organizations as the only person (or one of a very few) whose primary focus is on raising revenue. In fact, many of us thrive on the challenge. And we are constantly trying to out-do last year's results — which sometimes means we are competing with ourselves.

An organization that cultivates a healthy fundraising culture through participation, partnership, and information sharing will be better at weathering these transitions.

I laugh often with my colleagues about these shared character flaws. But the painful reality is that, unchecked, they can lead to burnout and high turnover. At the end of my third fiscal year with PJC, I realized my own burnout had reached dangerous levels. Previously, I had cured that problem by searching for a new challenge with a new organization. In this case, I really did not want to leave. Inspired by a trailblazing co-worker, I negotiated a short sabbatical, from which I returned with a renewed spirit, increased creativity, and the awareness that work-life balance is absolutely critical to the success of our fundraising program. And because I structured this leave during a natural lull in our fundraising cycle, we did not miss a beat.

Tatjana Loh reports that a sabbatical also helped the Women's Building retain their valued executive director. A few years ago, she and other senior staff created a temporary leadership team so that their executive director of 10 years could take a much-needed break. Like me, she returned refreshed and inspired. Although sabbaticals are not often standard policy in nonprofit organizations, I strongly encourage boards and executives to think about the benefits of this approach. The alternative could be high turnover in otherwise valued staff.

Achieving an ongoing sense of balance is important, too. I now regularly schedule quiet writing time and occasionally work from home. Tatjana chooses to work a four-day week. John takes week-long wilderness hikes twice a year. I encourage you to create a reasonable organizational culture that invites balance and where quiet times are as important as busy ones.

As Tatjana says: "Social change is a marathon, not a sprint. We all have much great work to do. The workplace is all about human relationships, and with careful attention to those relationships every day, we will reach the finish line." **GFJ**

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for Nonprofits to Survive & Thrive Now and into the Future

BY KIM KLEIN

The economic problems nonprofits are facing now began in the 1980s, and this particular economic meltdown has been a long time in coming. I strongly caution against being a-historical. This particular market drop is one in a series of problems that started during the Reagan Administration, when the tax structure was changed dramatically to favor the wealthy. Since then, a series of events has contributed to the current problems: massive cuts in federal spending and changes in the way government programs were administered under Reagan, the devolution of welfare under President Clinton, the first Gulf War, the dot-com bust of 1999, the attacks of Sept. 11, 2001, and the sharp market drop that had begun before that and continued for more than a year after, the vast gap between rich and poor, the number of people propelled into poverty over the last twenty years (and especially the last few years), the ongoing \$9 billion-per-month wars in Afghanistan and Iraq, continued government cutbacks in social services and the growth of the nonprofit sector to its massive current size, plus a number of other factors that you undoubtedly can name. These are all part of what is hurting us now.

Although this global market drop may be the final straw that pushes some nonprofit organizations out of business altogether, most organizations will survive and some will thrive in this next period. If you plan to be in either of those groups, there are things you will need to do to raise money. In this piece I present five of them to get

you started. But first, I want to discuss the frame of mind that you need in order to take this advice seriously.

CULTIVATE AN ATTITUDE OF EXCITEMENT

Most important, be very clear that we are not “in a crisis” right now. In a crisis, we can pinpoint the beginning and often the ending, or at least the easing of the crisis. In a crisis, staff work longer hours, volunteers give lots of time temporarily, even the most inactive boards meet and decide what to do, and some donors make larger gifts on a one-time basis to get you through “the crisis.” Everyone steps up their pace, knowing the situation is temporary.

Then the crisis passes, and the organization returns to a more normal way of functioning.

The current period is not a crisis because this economic roller coaster, this unpredictable

global economic reality, is how it is going to be for several years to come. It may get worse before it gets better, but more likely it will get worse and better, better and worse, with new and unimagined happenings that will help or hinder recovery. In fact, “recovery” must be defined differently than just going back to the way things were. Unemployment will spread, more venerable iconic corporations will declare bankruptcy, prices of some things will go way up and costs of other things will go way down. Donors will be nervous and uncertain about what they can give, and they will be much more particular in choosing which organizations to support.

**This economic roller coaster
is how it is going to be for
several years to come.**

Because this is not a short-term situation, you have to see this next period of time as exciting, as full of possibilities, as an opportunity to expand your individual donor base, to work with more volunteers, and to sharpen your mission and goals. Dee Hock, the founder of VISA International, coined the term “chaordic” to describe certain kinds of organizations. The word is a combination of “chaos” and “order,” and the concept of operating at the crossroads between those two states needs to be the driving force of successful organizations over the next decade.

Second, be very clear that whatever weaknesses are in your fundraising program now will be magnified during this time. If your organization relies heavily on foundation funding, if you don’t have a fundraising team that includes some board members and other volunteers, if your records are spotty and poorly kept, if your website is static and boring, if you are not clear on your vision, mission and goals, if you treat your donors like ATMs, you will be hurting financially over the next months until you fix your fundraising problems.

Finally, don’t hope for things to get better. Think, “This is a very exciting time to be doing our work.” Say it often and get other people to say it. We know that words have power, and the fact is, this is an exciting time. We have a new president, capitalism has been (at least temporarily) disgraced, people are open to new ideas and new organizational forms. I really believe that the next five years could be the most creative time in my entire life. It won’t be easy, and people will suffer, but whole new ways of doing business and being in community are already arising.

HOW TO RAISE MONEY NOW

So here are the five things your organization needs to do to raise money in this immediate next phase of its life.

1. In all your communications, acknowledge, but don’t dwell on, the economy. Focus on why the work of your organization is important and continues to be important: What are your plans for 2009? What are your accomplishments for 2008? If I am already a donor, am I proud of you? If I haven’t given before, why would I start now? People don’t need to be reminded that this is a hard time for everyone. They need to be inspired that good and important work is happening and will continue.

2. Let donors know you are spending your money properly. In addition to your vision, mission, and goals, donors are going to be most concerned about your financial decisions. So give out a lot of budget information, and be as financially transparent as possible. Use narrative explanations of budget information and don’t use words like “overhead” or “administration” without a narrative explanation. For example, let’s say “bookkeeper” is one line item. The narrative explanation would be, “Our bookkeeping system is designed

to ensure that money is used properly and that we get maximum mileage out of every donation. For five years, our audit has showed that we follow all ‘best practice’ standards for accounting.” Or “rent” might be accompanied by this explanation: “We have offices that are comfortable, inviting, with windows and up-to-date equipment, allowing our staff to work to their maximum efficiency. But most of the furniture was donated and because we are in a building with other nonprofits, we share a photocopy machine and other office equipment, keeping our costs down.”

Publish your budget, expenses, and income on your website, as well as your audit, if you have one. Tell people they are welcome to write to you if they have any questions and give them your email address. Very few people will write, but the fact they can write a real person and are invited to do so is very reassuring.

3. Focus a lot of energy on your mid-range donors — people who give \$100-\$1,500. Gifts in this range indicate

the donor likes you well enough to give you a bigger than usual gift. These gifts are almost undoubtedly made from income (rather than investments), and even if unemployment goes to 10 percent, 90 percent of your donors still have jobs, so they can still afford to give you money. A person who can afford \$100 once a year can afford that amount twice a year, or with effort, four times a year. Many people who give \$100 could give \$200 or even \$500.

Mid-range donors are often people who are giving what is for them a large gift. They are thinking about your group and stretching to reach \$250, \$500, or \$1,000. A person who gives \$35 does not imagine that their gift is making a big financial difference. This person gets a thank you note, a newsletter, an invitation to an event, and another request, and doesn’t really expect more than that for their donation. A person who gives \$5,000 gets a thank you call,

Whole new ways of doing business and being in community are already arising.

Focusing attention on mid-range donors will give them respect commensurate with the stretch they are making to give this donation.

a visit, and more personal attention. This person gets what they expect for that size gift. But for \$250, a donor may well get a thank you note and a newsletter, not much more than if he or she had given \$35. These are the people who should get more consideration.

Focusing attention on these mid-range donors will keep them giving and will give them respect commensurate with the stretch they are making to give this donation. Call to thank them.

Write to them personally when asking them to renew their gift, and use a letter followed up by a phone call to ask them if they can give more this year. If you have enough people on your fundraising team, these are also donors you should consider meeting with in person.

4. Examine your fundraising program for problems and solve them. Are personalized thank you notes sent out promptly? Is your database adequate? Is your website up to date and does the content change frequently? Is your newsletter well written, with news and analysis, not just puff pieces about your organization? Does everything you produce invite people to give money? (Some invitations will be softer and some more assertive, but if I look at all your communication, I should be very clear that I am invited to be part of your work with a donation.)

5. Make a list of the 50 most important people to your organization: Who are the people who would be very

upset if you went out of business? Who are your founders and visionaries? Who has given you money for the most number of years? Who are your biggest donors? Who are your best and most reliable volunteers? Who opens the most doors for you?

If your list contains more than 50 people, that's great. If fewer, that's OK. Make a note beside each name about what you are going to do with this person next. Ask for more money? Ask them to host a small house party? Ask them to introduce you to someone? Ask them if they would be willing to help with fundraising? People like to be

needed, and as Cesar Chavez said, "People are far more appreciative of what they do for you than of what you do for them." So ask for what you need, and don't mind if some people say they can't help right now. You will be very surprised at what some people are willing to do for your organization, and you need to mobilize that energy.

These five suggestions are just a start, but they are all things you should be doing all year long, year in and year out. A strong, diverse, flexible fundraising program that uses a lot of strategies and a lot of volunteers is one that will help your organization stay solvent and vibrant in the weeks and months to come. **GFJ**

KIM KLEIN IS PUBLISHER EMERITA OF THE *GRASSROOTS FUNDRAISING JOURNAL*.

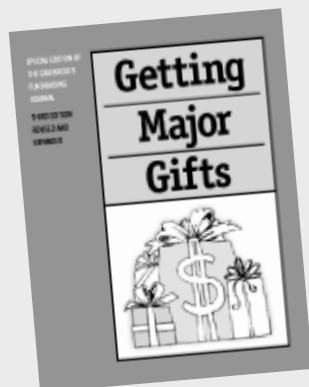
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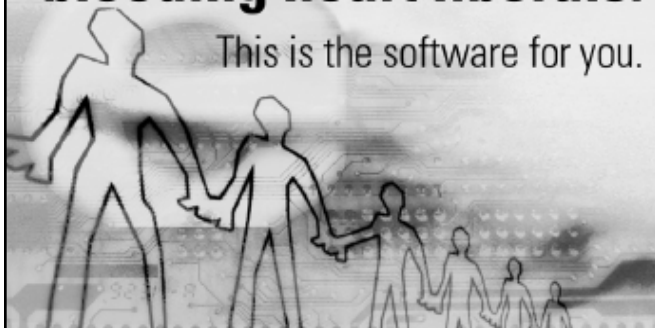
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