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Changing Times...

By Jennifer Emiko Boyden

WELCOME TO THIS REDESIGNED ISSUE of the *Grassroots Fundraising Journal*! We've been planning the changes you'll see inside for some time, trying to incorporate the suggestions of the more than 500 readers who responded to our survey about what you'd like to see. With this issue, we've tried to modernize our look and provide more variety—including shorter pieces for those looking for a quick tip or two, in addition to longer, how-to articles and reflections on changes in the social justice nonprofit sector. Our new designer, Chris Martin, brings 20 years of graphic design experience to the *Journal*. We thank him for helping us create a great new look for the magazine.

We're also deeply indebted to Cici Kinsman, of C^2 Graphics, who had been the *Journal's* designer since 1995. Cici brought the *Journal* to new heights, incorporating full-color photographs and illustrations. Cici has always been amazing to work with—creative, flexible, and accommodating. Thank you, Cici, for the last 14 years of design excellence!

The change in the *Journal's* design is timely, as this issue addresses generational change in the nonprofit sector and the importance of taking care of ourselves and each other in the face of the challenges this brings. Kim Klein interviews the authors of the new book, *Working Across Generations*, about fundraising and generational change in the nonprofit sector. As a case study of the big picture captured by the book, our own Priscilla Hung and Stephanie Roth describe some of their experiences sharing leadership across generational and racial differences at GIFT and offer some tips for smooth leadership transition.

This issue is also about self-care. We know that, especially during economic times like these, the pressures on fundraisers are intense, and we want you to have the tools you need—not just to raise money for your programs but also to take care of yourself, your organization, and larger social justice movements. GIFT's Manish Vaidya offers some concrete steps and resources for addressing all of these issues.

Our new design also includes two new, shorter columns. We're excited to have Nzinga Koné-Miller from Watershed, an online fundraising and advocacy consulting firm, available to answer your tech-related questions (thanks to all who sent in questions!). In this issue, Nzinga offers an introduction to getting started with e-mail communication, as so many of your questions were related to that topic. Feel free to send more questions as they come up (jennifer@grassrootsfundraising.org).

This issue also introduces a column featuring inspiring stories for troubled times. Here we take a quick look at a highly successful effort by the Northwest Coalition for Alternatives to Pesticides to convert e-mail subscribers to donors. Even as the devastating news of the economy was hitting they got exceptional response rates!

You cultivated these exciting changes at GIFT, and this magazine—as well as our other programs—is nothing if it is not useful to you, so please, make it yours by commenting, donating and continuing to sustain our community of grassroots fundraisers!

Jennifer   jennifer@grassrootsfundraising.org

P.S. Please stay tuned for our *Journal* re-launch party (in Oakland, June 25th) and celebrations of the new GIFT (May 14th in New York and September 25th in Oakland).

STOP THE BURNOUT

20 Tips to Help You Fundraise for the Long Haul

By Manish Vaidya

"My previous patterns were to give my total self (150%) all the time, no matter what…. I spent six months working with my doctor to figure out what was wrong with me. We did every test he could make sense to do. Finally, he looked at me one day and said something like, 'Perhaps you're simply exhausted.'"

–Jennifer Pelton, Public Justice Center

"In our experience, while resources are a real problem, the deeper problem is a culture within social justice movements (and the larger culture) that puts everything else ahead of sustaining the people doing the work."

–Holly Fincke, Windcall Institute

SOUND FAMILIAR? Anecdotal evidence suggests that burnout is very common in our field.

Fundraisers, the grassroots organizations we work for, and the social justice movements we're a part of can't be truly sustainable unless we're financially, physically, and emotionally sustainable. When we're out of balance in taking care of ourselves and each other in these ways, we contradict the other goals of our social justice work. According to the Spirit in Motion project of the Movement Strategy Center, "Burnout is … about not having the other supports in place for us to work in healthy and sustainable ways."

In our March/April issue, Jennifer Pelton's article, "A Healthy Workplace + Positive Fundraising Culture = Retention of Fundraising Staff," reminded us of some of the structural supports that help keep a fundraiser in the job: passionate involvement in the cause, reasonable expectations for the work, participation of program staff in fundraising, and the chance for the fundraising staff person to grow in her job.

In this issue, we feature self-care and sustainability because, in this economic moment, the need for fundraisers to take care of ourselves is getting lost as organizations operate in 24/7 crisis mode. This is a counterintuitive way to address the need to build a movement that can thrive for the long haul.

Burnout is a Real Problem

Burnout is a problem for most people working in nonprofits, particularly small nonprofits. It is a particular challenge for fundraisers because of the special stresses of raising money. We are often expected to raise the entire budget of an organization by ourselves, with little to no training, support, or infrastructure for fundraising. Our work often goes unrecognized by co-workers, who may see it as a necessary evil but not as the "real work" of the organization. Boards and executive directors often don't understand that it is everyone's job to help raise the funds to keep the group's programs going. Moreover, fundraisers have to challenge deeply entrenched fears (their own and those of board members and staff) of asking for money. In the off-chance that we are able to accomplish everything on our massive to-do lists, we are rewarded with…more work.

With the current economic turmoil and its financial and emotional toll on the people our groups serve (and on us), our high-stress jobs are going to get even harder. We'll have to raise much more money than we did before, which causes some of us to work well past quitting time and drives others to quit our jobs.

In a desire to learn how activists can sustain themselves, the Urgent Action Fund for Women's Human Rights (UAF) interviewed more than a hundred activists from around the world, resulting in the publication, *What's the Point of Revolution If We Can't Dance?* UAF writes, "During the interviews, activists were clear that they didn't see that how what they felt about themselves—how exhaustion, or sadness, or worry about making ends meet—how they keep themselves safe—had anything to do with their 'real' work. For them, it was completely separate."

Many of the themes that appeared in UAF's report are the same ones that we have heard fundraisers express:

- "The endless cycle and stress of fundraising"
- Trying to earn a living and still do the work you love
- Working without rest or break as work "seeps into every aspect of your life"
- Feeling that whatever you do is never enough
- Having difficult, unaddressed power dynamics in your relationships with co-workers
- Not knowing how long you'll be at your current job or what comes next (Do you take a job at another organization? Change your career? Retire?)
- Getting lost in the work and not making enough time to have fun
- Trying to cope with the trauma, violence and other suffering that we, and the people our organizations serve, face every day.

Kim Fellner, former head of the National Organizers Alliance (NOA), writes about a phenomenon that GIFT often sees in *Hearts on Fire: How Do We Keep Them from Burning Out?* Often, she says, "staffers of color are promoted without training or support and then held accountable for failing to meet unrealistic organizational expectations. Not surprisingly, women of color experience burnout disproportionately. Mid-career women of color are in high demand on the job market, but are frequently burning out from being over-displayed and under-valued, without enough colleague-ship, support and/or real power to define organizational agendas."

"ALL THE FUNDRAISING STRATEGIES IN THE WORLD WON'T HELP IF YOU'RE TOO TIRED TO IMPLEMENT THEM."

Many of us are "accidental fundraisers"—we took on fundraising roles because of our passion for the mission of our organizations. Having passion for the work is a key requirement for being a good fundraiser. But following passion without stopping to make space for rest and reflection is a dangerous path that can lead to burnout.

Please use these tips to take care of yourself, because all the fundraising strategies in the world won't help if you're too tired to implement them.

How to Begin

Addressing burnout has to be seen as a necessity on an organizational level. But there are things you can do to support yourself as a fundraiser even if your organization is not supportive yet. Susan Wells, author of *Changing Course: Windcall and the Art of Renewal* and co-founder of the Windcall Residency Program for long-time activists, writes, "To prevent burnout, identify the things in your life that relax, nurture, and refresh you: things as small as doing crossword puzzles or listening to music, or as large as spending regular periods of time in nature. Write them down. Keep them in your routine and do not let them be eroded or replaced by a growing workload….The trick is to identify the activities that are your particular counter-weights to the pressure of work, understand their importance, and keep them in your life."

Another key is to start small and stay focused on your sustainability goals. It takes some work to re-wire our minds to slow down and relax. Commit to making one or more changes for 40 days and see how it goes. Don't try to change everything at once—that will only generate a different kind of burnout!

For Yourself:

Here are a few ideas to get you started. For more tips and tools, go to our website: www.grassrootsfundraising.org/thrive

1. Every time you think of a task, write it down. Keeping such a list can ease your mind that you might be forgetting something. Keeping all tasks on a central list will cut both mind and organizational clutter and free you up to concentrate on the task at hand.
2. Say no. The more you practice saying no, the easier it will be to respond realistically when someone asks you to take on more work than you can manage.
3. Make an agreement with yourself—and stick to it—about what time you'll stop working each day (including checking work-related e-mail from home).
4. Work a maximum of 8 hours per day and 40 hours per week to give you time to cultivate real relationships with people outside of your paid work (and to honor the laborers who came before us who fought and died for these rights).
5. Fundraising consultant Kim Klein suggests that fundraisers keep their daily plans at half as much time as they'll be at work, because things come up (phone calls, e-mails, trying to fix the broken printer, etc.). So, if you work 8 hours a day at your organization, only schedule 4 hours of work per day. These 4 hours should include 30 to 45 minutes of thinking, planning, and filing per day.
6. Eat a social lunch every once in a while. Don't make a habit of working through lunch and eating at your desk—you're robbing yourself of the break that your mind and body need.
7. Build a support network for yourself. Meet regularly with other fundraisers to share frustrations, challenges, successes, and tips. Some fundraisers have established monthly lunchtime skill-sharing discussions with their peers; others meet for a regular happy hour at a local bar or a walk after work. Jennifer Pelton set up two "balance buddy" relationships —one with a colleague and the other with a close friend. "We check in with each other often, reminding ourselves and the other to keep a balanced perspective."
8. Spend time outdoors. Take a brief walk twice a day. If you're used to being in front of a computer, this switch will get some fresh air into your lungs, sun on your skin, and rest for your eyes. Outside of work hours, suggests Claudia Horwitz of stone circles, an activist retreat center, "Find some way to connect with the rhythms of the natural world….This might mean a real attention to the changing of seasons, planting a small garden or finding new open green space."

SELF-CARE AND SUSTAINABILITY RESOURCES:

Capacitar International
http://www.capacitar.org/

Center for Contemplative Mind in Society
http://www.contemplativemind.org/

Seasons Fund for Social Transformation
http://seasonsfund.org/index.html

Spirit In Motion program of Movement Strategy Center
http://www.movementstrategy.org

stone circles
http://www.stonecircles.org

The Center for Nonviolent Communication
http://www.cnvc.org/

Windcall Institute
http://commoncounsel.org/Windcall%20Institute

More resources at www.grassrootsfundraising.org/thrive

For Your Organization:

Again, find more tools and tips for supporting your organization at www.grassrootsfundraising.org/thrive.

1. Challenge your organization to truly integrate fundraising into the rest of the work. Work with allies in your organization—perhaps an organizer/program coordinator or a new board member—to build this culture of fundraising. To start building that team, try a tip from Sabba Syal, graduate of GIFT's fundraising internship program, "Do team-building events, games, or a lunch-in with co-workers."
2. Build a strong volunteer fundraising team, thank them often, and commit to giving them increasing levels of responsibility. The camaraderie will be enjoyable, and sharing the work will reduce your stress.
3. Make sure prospective board members know what the fundraising expectations are and give them training and support to fulfill them. This means no more luring prospective board members with the promise of free pizza!
4. During meetings, include space for people to share appreciations for work that their colleagues are doing.

In addition, make a bulletin board or poster displaying accomplishments, adding to it throughout the year. You can include personal as well as work-related congratulations: "Natalia called 5 donors this week!" honors their work, while "Chauniqua ran a marathon!" helps co-workers support each other's lives outside of work.

5. Practice active listening and non-violent communication skills. So many organizational tensions occur from miscommunication. Invest time and energy into learning these skills.
6. Insist on a detailed fundraising planning and evaluation process every year and before and after each major fundraising activity. Then you can use what works, not just what's always been done. Claudia Horwitz notes, "Make sure your fundraising strategies—at least some of them—match up with who you are….Are you doing anything you don't really believe in, or worse, that feels like a contradiction of your value system? This can take a big toll over time."
7. Make sure your fundraising calendar gives you a break between heavy fundraising activities. Don't schedule a major special event to occur right after a hectic fall fundraising season. Holly Fincke of Windcall suggests, "Ask yourself, 'What can a body and a brain sustain?'"
8. Advocate for healthy policies and practices at your organization. NOA's guide, *Practicing What We Preach*, lists some best practices, including comp time, vacation time, staff development and training, healthcare, parental leave, a pension plan and salary structure, among others. There are some cost-effective options even for organizations with very lean budgets.
9. Ask others at your organization what sustains them. Just getting some regular conversation going about this topic makes it legitimate and normal, which is a first step to making lasting change at your organization.

For the Movement:

1. Work in coalition with other groups. Movements for social justice are so much bigger than any one organization. Our field is notorious for competition, which runs counter to progressive goals. Work towards putting turf wars aside and get to know others who care about the issues you're passionate about and those who care about issues that you might be passionate about if you made space to learn more about them.
2. Let go of the little things and focus on the big picture. Although our fundraising must be driven by a belief in the mission of our organization, working against injustice is bigger than any one group. If another organization can serve our constituencies better than ours can, or if our organizations shut down due to a lack of funding or for other reasons, it won't be the end of the world. Let's do the best we can with the strategies and organizations that we have. If they don't work, let's try more sustainable ones.
3. Challenge the status quo with institutional funders. Many fundraisers say that their biggest stressor is the number of hoops they have to jump through to get and comply with grants from government and foundations. They mention that funders are fickle, that grants come with many strings that discourage the use of innovative long-term strategies, that funders' policies fuel competition among organizations, and that groups that are honest about their challenges risk losing grants because funders favor things they view as short-term successes.

We need to work with foundations to expand their understanding of the funding we need for our work. And we need to fight for tax policies that not only stop favoring the rich but that redistribute wealth fairly and that make tax funds available for social justice and social change work. Foundation and government money is our money; it was created from the labor of working people. Let's work together to encourage an increase in the percentage of funds foundations pay out to social justice groups. Let's push for an end to unfair tax policies that make the rich even richer. Let's organize our communities to take larger, sustained action to demand that the government stop cutting basic services to our communities.

These are not unreasonable demands—they are strategies for survival. ■

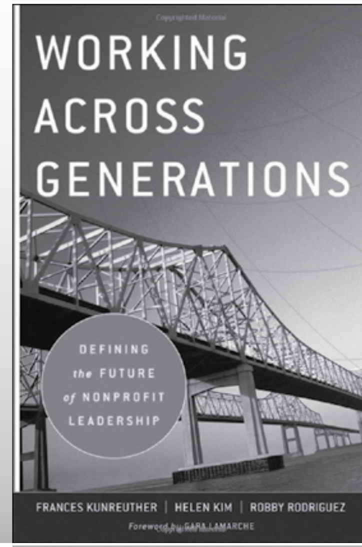
"JUST GETTING SOME REGULAR CONVERSATION GOING ABOUT THIS TOPIC MAKES IT LEGITIMATE AND NORMAL, WHICH IS A FIRST STEP TO MAKING LASTING CHANGES AT YOUR ORGANIZATION."

Manish Vaidya is program & development coordinator for GIFT. Read in-depth interviews with Claudia Horwitz and Jennifer Pelton and share your self-care tips at www.grassrootsfundraising.org/thrive.
Thanks to Sabba Syal for research assistance with this article.

Fundraising and Generational Change:

A Conversation with the Authors of *Working Across Generations*

By Kim Klein



FOR SEVERAL YEARS, nonprofits have been paying attention to the fact that, in many organizations, the Baby Boomers who started the group are looking to cut back or retire altogether. At the same time, younger activists coming into nonprofit work want to have an impact and create a life for themselves in social change. The Building Movement Project (www.buildingmovement.org) has been researching, writing, and training on these issues for the past 10 years. An important contribution to this conversation is their recent book, *Working Across Generations: Defining the Future of Nonprofit Leadership*, by Frances Kunreuther, Helen Kim, and Robby Rodriguez.

In *Working Across Generations*, the authors explore how nonprofits are affected by the fact that four generations are now involved in nonprofit work. Spanning an 80-year history, nonprofit workers range from those who experienced the Second World War to those coming of age during the wars in Iraq and Afghanistan. In between is the Baby Boomer generation, many of whom were shaped by the Vietnam War era.

The authors have compiled not only years of research, but, as important for *Journal* readers, they offer exercises, questionnaires, and specific advice for those wanting to build organizations in which staff and board members work productively together across generational lines, derived from the authors' many workshops, evaluations, interviews, and focus groups on the issue.

Because the book does not specifically address the relationship between fundraising and generational change, I asked the authors to comment on that topic, resulting in the following conversation.

Kim: You state in your opening chapter, "This book is designed to help you recognize the interests and needs of new generations of leaders, understand the decisions facing aging leadership and think about what type of leadership is needed for social sector work in the future." The three of you who wrote this book are yourselves of different generations, spanning three decades. What did you learn about generational change just from writing the book together?

Helen: As we talked with people we realized we sometimes heard things differently. We were able to model how to create space to understand issues and concerns across generations and to listen deeply to each other. In a way we were our own microcosm of what it is like to come together and do this work intensely.

Frances: I think we all wound up empathizing a lot more with the generations that we were not from. One of the main factors that allows generational change to be healthy is trust. We often found in our workshops and conversations that members of each generation were trying hard not to offend people of other generations, so they were not always saying what they felt. Yet, ironically, people would be hurt or offended anyway. As we worked to make the discussions safe for others, we conversed a lot about our own lives and this helped us also understand the data and the research much more deeply.

Robby: We learned that the issue of generational change in nonprofits is also a question of leadership. Writing the book helped us think through the challenge of leading across generations and the opportunity that exists when people of different generations can lead and follow together in an organizational structure.

Kim: What do you think are the most important things to keep in mind that might be helpful for people doing fundraising when working in a setting with mixed generations?

Helen: Let's start with the purpose of fundraising, which is building relationships. The need to build relationships is also the first principle of working across generations and probably holds true about working with any kinds of differences. When we reflect on what we know about how to build relationships with donors and volunteers, and what we can do to strengthen those relationships, we can see a parallel in cross-generational work. Second, each person in a work environment needs to be aware of what roles they play and intentionally set about building trust with co-workers. The book contains a number of suggestions of how to do this. One suggestion that certainly translates into fundraising is to bring young staff, board members, and volunteers along on donor or funder visits, meetings, conferences, etc. Good fundraisers make sure that the relationships aren't just held by one or two people. Third, seek out younger donors, which requires using younger people to help raise money.

Frances: In addition, we need to admit that each generation has stereotypes about the others. When we admit them and discuss them, we can let them go, even laugh at them. As much as possible, it is important to let go of any preconceived notion we have about each other generationally. We often saw in the interviews that a Baby Boomer would say, "Young people are so good with this technology, so they can do that and we can supply the ideas." The problem with this stereotype is that it is a false dichotomy. Obama's head of Internet outreach is 24, which fits a stereotype, but his speechwriter is 26, which does not. We have to get to the place where we know that we share the same values and to do that we have to extend trust. The first step is not to pigeonhole anyone.

Kim: Trust is a big element of fundraising. Donors have to trust that the organization is spending money properly in order to want to give again. But their trust is reinforced by audits, annual reports, and a board that carries fiduciary responsibility.

In your book, you explore trust a great deal, and also mistrust. You have a number of examples of Baby Boomer executive directors asking their staff for their ideas, then going off and doing whatever they want without reference to those ideas. The Boomers feel they have the authority to do that, but the younger staff feel marginalized and unappreciated, which does not make a healthy or trusting workplace. How can groups build and extend trust across generational lines?

Frances: Trust cannot be separated from power. People in power have to extend more trust up front because the people without power assume they are not going to be trusted. Often this translates into older people extending trust to younger people before the younger people return that feeling. It's almost like if people in power extend it to others, then they will earn it. People not in positions of authority in an organization may be more untrusting to begin with. Once trust is earned, it carries people though a lot of difficult times.

Helen: It's critical that we invest the time it takes to build trust. When you think about someone you trust, how did you get to that place? What were the shared experiences, conversations, and building blocks that allowed that to happen? We often heard people say, "She let me shadow her," or "He introduced me to a lot of people," or "She told me to write the report and she would give feedback later." You extend yourself and show that you trust someone else and create common experiences and opportunities. Don't overlook the importance of spending time doing things together. It's an ongoing leadership practice. Trust is developed by sharing your story with others, but more important, it is built by listening. So often people think they are building trust when they are telling someone their life story, but when they are doing that, they are not listening. Boomers especially need to do less telling of their own story and more listening to other people's stories. And of course, this is just like fundraising. When you are with a donor, you need to ask them about themselves and not just talk about your organization.

"TRUST IS DEVELOPED BY SHARING YOUR STORY WITH OTHERS, BUT MORE IMPORTANT, IT IS BUILT BY LISTENING."

Robby: I learned that in order to build trust with folks, and in particular older-generation leaders, I needed to find opportunities for us to work together and do things together. That way we could also have moments when we look back and say, "Remember when we did this together?" or "Remember when that happened to us?"

Kim: I notice a lot of Boomers will take a younger staff person or board member with them on a donor visit, then the Boomer does all the talking. The young person sits there like a potted plant and that is not good. When you take someone with you to a donor visit, you need to plan ahead what each of you is going to say.

Helen: If you practice and everyone gets a chance to speak, but also takes time to really listen, it transforms your relationships. You learn that the donors are whole people with wonderful stories and ideas, and the donors learn there are multiple faces, multi-generations in the organization. Their trust in the future of the organization is increased.

Kim: It seems that a lot of what you need to do to have healthy communication across generations is what you need to do to have a healthy fundraising program: listen, show a genuine interest in others, learn from other people's experience, and drop your assumptions.

Frances: And don't be afraid to make mistakes and ask for help. That also builds trust, ironically.

Kim: Your book looks at movement building and the nonprofit sector through the lens of generational change, but it does not pretend that generational change is the only way to look at building a movement. However, I was struck by the fact that there is a lot about race and racial dynamics in your book, yet gender, for example, is rarely mentioned. What is the relationship between generational change and race, and are other forms of oppression not as important in this particular area?

Frances: The older generation talks about sexism a lot and that is in our book. Baby Boomer women experienced a lot of sexism from Boomer men, but they did succeed in breaking that down a great deal. What we saw in our research and workshops is that the barrier now is much more likely to be about race. At small to midsized organizations, which defines most nonprofits, you have mostly women, with older white women in leadership and young women of color in other staff roles. The young people we interviewed did not name sexism as a big issue, but they did often name race.

Helen: Unless we pay attention to race, gender, and class, we won't know what leadership we could have had until the possibility is gone [because people not given the chance for leadership will move on]. Look at each person in the organization as a possible leader. Put in place the communication methods that make it possible for them to assume leadership, and keep in mind that the next leader may look, talk, and think very differently than the current leader. It is interesting also to analyze our fundraising efforts by race by looking at the demographics of our donor base. I see many social justice organizations with mostly or all people of color on staff and in leadership, but the majority of their donors are white. These groups haven't reached out into their own communities for donors. Also, sometimes you see the only white person on a staff will be the development director.

Kim: The fundraising profession is very white, even in places where the majority of the population is people of color, something GIFT is working to address. I'd like to move to another aspect of fundraising and generational change. As you know, currently in the United States, seven out of ten people give away money. More people give money than vote, volunteer, or attend any house of worship. Further, in every country where philanthropy has been studied, the majority of people give away money. Some studies now say that the current generation—Millenials—are not going to be good givers. Some people think this is because many people learned to be givers in their church or synagogue and that as our country becomes increasingly secular, young people will not learn to give. What is your sense of this?

"YOUNGER PEOPLE MAY NOT GIVE IN TRADITIONAL WAYS, BUT THAT DOESN'T MEAN THEY WON'T GIVE."

Helen: It would be interesting to look at the age breakdown of the donors to the Obama campaign. Web 2.0 is attracting a lot of Gen X and Millenials. As the saying goes, "Your point of view is determined by your point of viewing." Younger people may not give in traditional ways, but that doesn't mean they won't give. With younger people, the online and off-line community is one. There is no separate identity as there is with Boomers. It is too early to say how this will translate with Millenials. I see organizations that say they want younger donors, but they don't have a "donate now" button on their website or a blog, and they don't take advantage of any of the ways that young people communicate.

Robby: That question really emphasizes the point about working across generations. I agree that giving is learned behavior and this is why it is so important to begin cultivating young donors right away. Many organizations are doing this in a variety of ways. Overall however, the basics of fundraising hold true—it's about building relationships, good communication, being creative, and asking!

Kim: For me the problem is that these studies are not that useful because the giving habits of 25-year-olds are being compared to giving habits of people in their 50s. We don't have any studies that I know of about the giving habits of Baby Boomers when we were in our 20s. In thirty years, we will know a lot more because we will be able to compare Millenials now and what their giving is like at 50 or 60 years old.

Frances: We hope the book provokes discussion about other grassroots ways to raise money. For example, we know that most money given away goes to religion. Many young people are very spiritual but they are not going to a traditionally religious setting. What is the approach to them? The strategy may be different but the deep values are similar.

Kim: The one thing that most hampers people from individual donor fundraising is the taboo about asking for money. Do you see that taboo lessening in younger people?

Frances: Younger people feel that they have more of a right to talk about money and have money. Boomers felt money shouldn't matter and we should be doing this good work for free. Young people are much more realistic, especially the generation growing up now. I think Gen X and Millenials are much more open about needing money to run organizations properly, to pay people fairly, and to have good infrastructure. So I would say the taboo about asking and about talking about money is beginning to break down.

Kim: What about the role of government and taxes? The World War II generation and Boomers have the experience of government trying to address poverty and providing a limited social safety net. People growing up under Reagan and the Bushes, and even Clinton, have no experience of the government as social support. In my observations young people often don't think of government funding having any role.

Helen: The Obama administration may be a time in which we all see the important role that government can play. That's our hope. We are in the midst of significant changes and a year from now we will have very different ideas about this. Across generations people know that things like poverty and climate change must involve not just our organizations but government and international efforts.

Frances: It is interesting seeing the difference in views toward government based on generation. Older organizers see their job as pressing government from outside, but many young people actually run for office or deliberately seek jobs in the government. This is a big shift from more traditional organizing. I think young organizers have a different sense of how to gain political power, and they are more inclined to get into government in addition to agitating from outside.

Helen: One thing that comes from multi-generational work is the recognition and willingness to employ multiple strategies in multiple spheres—door knocking, Web presence, being part of the system, being outside the system, etc.

Robby: I believe young people's growing interest in the role of government and taxes is on the rise. I just attended a city budget hearing in Albuquerque where at least half the people in the room were under 25 years old fighting for the survival of programs that directly benefit young people. They were organized and they were there in force. So, yes, with Obama and the economic recession we are seeing a lot of opportunity for folks, and young people in particular, to become engaged in the debate about government, taxes, and the commons.

Frances: Many are responding very positively to Obama's call to service. I don't know that that is particular to any generation, though. For example, the large amount of money given to religion is about involvement, attending services week after week. This has always been true of most organizations.

Kim: Another piece of prevailing wisdom is that Gen X and Millenials don't want to just give money—they want to be involved.

Helen: The younger generations grew up in an information age and there is an expectation of having information at your fingertips. This may be more the type of involvement younger people demand. A website, a Facebook page, is currency.

Robby: This last election taught us that young people want to be involved in our democracy. My nieces, who are teenagers, were the ones making sure that their parents and grandparents got out to vote. They couldn't vote but they were lobbying people who could vote to vote in their interest. This is a very good sign for the future of our democracy.

Kim: Your book has a number of suggestions and exercises to help people talk across generational lines. Can you speak about how your suggestions might apply to fundraising?

Frances: Older generations often want to pass on their wisdom, and fundraising certainly requires skill, practice, and wisdom. But part of wisdom is letting people make mistakes, letting people try things, and listening to new ways of doing things. Wisdom means not stepping in immediately. As a Boomer, what I have learned (and I am not always great at it), is to let the younger generations do the work. I have had to learn how to step back, listen, and help people talk things through. We Boomers have to stop feeling we have to step in and fix everything.

Robby: Providing opportunities for people to learn on their own is really important.

Kim: Teaching people how to ask for money is the same: don't interrupt, don't be offended, don't be defensive about your organization, and don't rush in to see if you can figure out what they are trying to say. People building relationships in fundraising can use their same skills to build relationships across generations.

Your book will be tremendously useful to people of all generations in the nonprofit world. I strongly recommend it to all the *Journal's* readers. ■

Kim Klein is the publisher emerita of the *Grassroots Fundraising Journal*.

How Do I Begin Using the Internet for My Organization?

By Nzinga Koné-Miller

THERE ARE MANY OPTIONS at your disposal for online fundraising and advocacy. In this initial column I focus on e-mail, since it is typically the best way to get people to respond online.

First, consider the impact that incorporating online methods into your communications will have. It's easy to think of your online work as a task that you can assign to the employee or volunteer with the best writing, marketing, or geek-ing skills and peek in for an update on occasion, but it really should be an integrated part of your overall communications strategy. Once you gain momentum, the online work—by virtue of its immediacy and potential for interactivity—may start to drive some elements of your program.

A national human rights organization experienced such a shift last year when their online campaign brought so much attention that their list size nearly quadrupled, yielding exponentially more communications from supporters with questions and suggestions. The broadened geographical distribution and increased size of their online list made them consider how they could move to achieve their programmatic goals using the Internet, and how the nature of their programs needed to evolve due to their online efforts. They decided that the transition to this new way of organizing was dramatic enough that their next hire would be someone with the technical skills to support their broadened approach.

So back to where you begin.

The answer depends on what you're starting with. You may have tools to send messages, but no list. You may have a list, but no tools. Perhaps you have neither; perhaps, both. The reality is that you don't need a huge list, and you don't need the best tools —but if you are missing either, that's where you'll likely need to begin.

For example, your organization may be a two-person shop with 100 e-mail addresses in an Excel file, no budget for technology, and the only tools at your disposal are Outlook and PayPal. This certainly isn't ideal—nor is it sustainable in the long run —but it is a place to start.

There are numerous resources for tools that can serve your purposes, such as NTEN, Idealware, and consultants who specialize in technology selection. The two critical points are that you need a way to get your messages out the door, and you must be able to accept donations online.

It's also extremely important that you have access to the results of your efforts—particularly to metrics like opens, click thrus, unsubscribe requests, and conversions (plus, reporting on donation results). These numbers help you understand how your list behaves over time, which ultimately helps you gauge the relative success or failure of a specific communication or campaign.

You also need to be continually building your e-mail list. Lists shrink on a regular basis, either through list "churn," (list members unsubscribe or e-mail addresses become undeliverable) or plain non-responsiveness from the people on your list. Some list members will never open a single message. So even if you have a relatively robust list, you never stop building that list, because the active segment will continually shrink.

If you already have basic tools and a list, then dive in. I don't mean send e-mail whenever the mood hits—you'll need to think about what you want to accomplish and plan accordingly. What's your vision? Who are you speaking to? How do you want to speak to them, and what do they want to hear from you? Your communications tell a story about your organization and your issues, and e-mail gives you the power to redirect that story on a regular basis.

Still, don't allow the instant gratification of the medium to lull you into short-term thinking—map out your narrative for the year and create a detailed messaging calendar for the next few months.

Incorporate your e-mail timeline in your communications calendar, but be flexible. One of the benefits of adding e-mail to your arsenal is that if an issue that is integral to your organization's mission appears prominently in the news tomorrow morning, you have the ability to message your list about it tomorrow afternoon. ■

Nzinga Koné-Miller is an account director at Watershed, a consulting and services firm designed to help organizations build, grow, and sustain relationships with constituents online.

Sharing Leadership Across Generations: A Case Study

By Priscilla Hung & Stephanie Roth

THE PROCESS OF EXECUTIVE TURNOVER, the transfer of leadership to younger generations, and the search for new leadership models in nonprofits have received a lot of national attention, including the excellent new book, *Working Across Generations*, whose authors are interviewed in this issue. At GIFT, we've been a living example of this trend. Here we share some of our recent experiences that may be useful for other organizations facing leadership transitions or looking at shared leadership structures. Although this article isn't explicitly about fundraising, there are certainly fundraising implications to these issues, which we touch on briefly.

Background

In the fall of 2006 GIFT and the *Grassroots Fundraising Journal* (GFJ) began merging, and GIFT closed its office in Denver and moved into GFJ's Oakland office. Priscilla Hung, who had replaced Kim Klein at the *Journal*, became co-director of the joint organization (using the name GIFT) along with Stephanie Roth, long-time editor of the *Journal*. In January 2009 Priscilla became sole executive director of GIFT, and Stephanie has continued as editor of the *Journal* for another year as she transitions out of a staff role in the organization.

Stephanie, 54, a white, Jewish lesbian, is part of the Baby Boomer generation born between 1945 and 1964. Priscilla, 31, is a straight Chinese-American born to immigrant parents on the tail end of Generation X.

Choosing Co-Directorship

Stephanie: I wanted to work with Priscilla as co-director both because I feel I do my best work in partnership and because I wanted to work part time so that I could continue with my consulting practice with nonprofits. It was clear to me that the executive director position was not one that could be done on a part-time basis. In addition, I didn't think it made sense for GIFT—an organization whose work was largely about developing the skills and leadership of people of color in fundraising—to have a white executive director. I felt confident that a co-directorship with Priscilla could work because we knew each other and shared values and perspectives on GIFT's mission. Because Priscilla already had a history with GIFT from being part of GIFT's intern program several years ago and because of her fundraising background, I also thought that she had the skills, experience, and commitment to share the leadership of the organization in this way.

Priscilla: As a person new to the executive director position, I highly recommend this process of first being a co-director. It allowed me to gain experience while being able to access the expertise and wisdom of my partner. It also allowed me to share the workload and responsibility so I could take the time I needed to learn new skills, which minimized feelings of overwhelm.

I felt supported, prepared, and excited. It was successful because Stephanie and I had previously worked together, and we like and respect each other. We each had experience with both GIFT and the *Journal*, and we were both invested in the newly merged organization succeeding under our leadership. I doubt that the co-directorship would have worked if any one of these elements had been missing.

Differences of Race and Generation

Although aware of some differences between us, we didn't initially focus on them. As we worked more closely together, however, our differences in working style and priorities become more apparent. We started to realize that some of our struggles had to do with generational differences and, to a lesser extent, racial-ethnic differences.

Priscilla: In *Working Across Generations* the authors note that a typical characteristic of Generation X is to act as a buffer generation between the Baby Boomers and the Millennials. As a younger woman of color from Gen X, I often feel squeezed between two different orientations. I seek legitimization as a professional in worlds that are mostly white, older, and with a hierarchical culture. At the same time, I feel compelled by younger generations who are rebelling against the nonprofit-industrial complex and seeking new organizational forms with more fluidity and lives with more balance.

Stephanie: Clearly, Priscilla and I grew up in different eras. I came of age when the nonprofit sector was much smaller and less professionalized. I always thought of my work as "movement" work, and initially I was part of the women's movement working on issues of reproductive rights and violence against women. There were no boundaries between "life" and work, and the term "work-life balance" had not been invented (though we all complained a lot about having too much work and not enough fun). We experimented with collective structures, and we tended to use titles like "coordinator" as opposed to "executive director" (much less CEO or president!). But these organizations, which were politically progressive, were also often led by white people, and the organizations were unable or unwilling to deal very effectively with racism and multi-racial organizing.

Although at GIFT Priscilla and I did not talk a lot about the differences in our age and racial-ethnic identities, I never felt they were topics we couldn't discuss. I was most aware of them in relation to the larger community outside of the organization. For example, in meetings, people addressed me more often or more directly than Priscilla, as if she might not be as "important" or have as much to offer in the conversation.

Because I've been in the movement 20+ years longer than Priscilla, I have longer-term relationships with people who are considered leaders in the social justice nonprofit sector. I believed that one of my key roles was to introduce Priscilla to some of these people and support her development. I didn't realize that this wasn't a typical experience of younger, newer folks in the sector. Priscilla recently told me that many of her peers complained that the older people they worked with were not very accessible and seemed to have an attitude of "we paid our dues and now it's your turn."

Priscilla: Here are some examples of how these differences affected our partnership. Outside the office, Stephanie had longer-term relationships with GIFT's donors, some foundation funders, and the community of consultants and intermediary organizations that serve nonprofits. Even though Stephanie did a good job of trying to share her relationships and networks with me, I sometimes struggled with being recognized in those spaces. It could be that these people saw someone who was young, female, Asian, and quiet, and immediately dismissed me as not being leader material. But I also think it is difficult to build rapport in relationships where there are multiple places of difference. For example, with our donors, building rapport with a woman who is older and white was difficult. But with a donor who is female and also young, I can build a stronger relationship even though we're of different races.

"DIFFERENCES [OF RACE AND GENERATION] AFFECTED OUR DISCUSSIONS OF WORK SCHEDULES, VACATION AND TIME OFF, AND COVERAGE IN THE OFFICE."

In the office, Stephanie—as is common with Baby Boomers—prioritized being available for the work and flexible with spending extra time to get it done, while I—like many people in my generation—focused more on self-care and allowing staff to set their own boundaries between their work and non-work lives. These differences affected our discussions of work schedules, vacation and time off, and coverage in the office. We also had different relationships with our co-workers. Stephanie, being older and part of the organization for a longer time, held more authority and was used to having to make the decisions. I, being younger and newer, gave more authority to the staff. One style isn't necessarily better than the other, but neither is going to work if there isn't agreement between the co-directors and clarity for the staff.

We also had differences in how we viewed finances. Stephanie's early career in smaller, scrappier organizations that were always struggling financially made her worried about the finances but also willing to take more financial risks. For myself, having started in a more established progressive nonprofit sector that was heavily foundation-funded, I didn't pay as close attention to cash flow but tended to be more cautious overall. For example, when Stephanie advocated spending money on direct mail to increase the subscriber base of the *Journal*, I was hesitant to spend money we weren't sure we actually had.

Dealing with Conflict

We all know that conflict is a part of life—and a part of all relationships—but knowing that intellectually and experiencing it at work are two different things.

Stephanie: Given some of the differences mentioned above, it became important for us to understand these differences and come to agreement about how to handle them early on in the co-directorship. We noticed that if we had a different point of view on a decision that had to be made, and those differences were aired at a staff meeting, the rest of the staff often got very quiet. We didn't realize initially that our differences made the other staff members uncomfortable. They reacted as though they were watching their parents fight, and seemed to feel they had to "choose sides" rather than that they had a right to their opinion, whatever it was. Learning how to work through our differences before bringing ideas to the staff (even if we agreed to disagree) was an important lesson for us.

Priscilla: We have different personalities. Stephanie is an extrovert who prefers working as a team, is passionate and emotional, and is brave enough to say unpopular things. I am an introvert and rational, who often works independently and acts quickly, and tends to speak only when needing to convey something that results in a next step. While this combination might be good for a partnership because we complement each other, I fell into the trap of trying to balance out Stephanie. Instead of providing a more complete directorship, I was actually negating her. For example, Stephanie was good at holding the staff accountable for their work, so I played the role of being good at providing support and understanding. At one point, Stephanie was having a conflict with one of the staff members. I was this person's direct supervisor, and when they came to me with complaints about Stephanie, instead of helping them talk to each other directly, I just listened and was supportive. I didn't realize that this was exacerbating the problem and undermining my partnership with Stephanie.

Lessons Learned

Here's our advice, most of which requires being intentional and mindful in all of your relationships:

- Be intentional about embarking on this kind of partnership, with an understanding of the obstacles and challenges that you and your co-director (and the rest of the organization) will face.
- Prioritize nurturing the relationship and make it just as important as any other work responsibility.
- Don't avoid conflict. It's a part of life, and pretending it doesn't exist or will go away if you don't talk about it is bound to backfire.
- Commit to truly listen to each other and respect each other's point of view, even if you disagree.
- Like two parents, figure out a way to relate to the rest of the organization (staff, board, and other stakeholders) as a team, as partners, and don't fall into a pattern of playing one of you against the other, or of giving mixed messages to those you supervise.
- Be willing to ask for outside help, which we did by hiring a consultant who worked with the entire staff on identifying the sources of stress and tension in the organization and working with us to improve communication and teamwork.

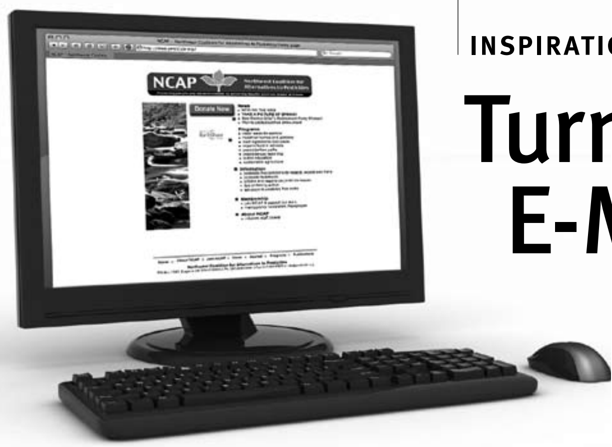
Transitions

While it was a big decision to embark on the co-directorship, ending it and transitioning from it in a healthy way also required its own level of effort and intentionality.

Stephanie: I knew that I did not want to stay on the staff of GIFT indefinitely. Soon after Priscilla came on staff, I talked with her about the timeframe I was considering for moving on, though I did not have a firm date in mind. I shared with her my hope that she would continue beyond my tenure and asked what she would need from me and from the organization to make it possible for her to take on greater leadership and responsibility. Her openness to taking on new challenges and responsibilities, including becoming the executive director when I left, made the transition process go much more smoothly than it might have otherwise.

Priscilla: My own career path, from being completely new to fundraising as a GIFT intern to being the executive director of a fundraising organization in ten years, was marked by continued support and investment in my leadership. I was continually given opportunities to learn new skills, meet people, and take on new responsibilities. In the beginning, I wasn't great at fundraising, but the main reason I continued to fundraise for social justice was because of the community and mentors I found through GIFT. They helped me feel that what I was doing was important and needed, and I never felt isolated in my work. I couldn't have asked for a better leadership development process. ■

Priscilla Hung is executive director of GIFT. Stephanie Roth is editor of the *Grassroots Fundraising Journal*.



Turning E-Mail Subscribers Into Donors

By Katie Schuessler

MOST NONPROFIT ORGANIZATIONS eventually bump into the challenge of how to build or expand their membership base —both for the purpose of fundraising and for outreach and activism. The Northwest Coalition for Alternatives to Pesticides (NCAP), based in Eugene, Oregon, is no different. With a membership of 1,700, we must continuously find new members both to replace attrition and to expand our base. In 2008, we proved that it's possible to combine prospects whose only connection with the organization is through an e-newsletter with a successful, traditional direct mail acquisition campaign—and to do so in the midst of a serious economic crisis.

House E-mail List a Smashing Success

People sign up to receive a free monthly e-mail (an "e-tip") detailing alternatives to pesticides and showcasing the latest related research. People have the chance to sign up at events we attend, through our website (www.pesticide.org), and by sending in sign-up postcards that are shipped by companies that distribute natural products. The postcards are color coded so we know which company they come from.

When individuals sign up for the e-tip, the form also asks for their full address and phone numbers. Although the address and phone number fields are optional, most people fill them in. We can then extract from this rich source the mailing addresses of people interested in our work.

For our recent direct mail solicitation, we also drew on addresses of people who had signed petitions or sent letters to help push for one of our program causes. Again, these were people who had shown interest in our actual program work.

We crafted a four-page recruitment letter detailing the urgency of supporting NCAP's efforts to push for healthy alternatives to pesticides and offered a premium for people who joined with a gift of $35 or more: an aluminum "pesticide-free zone" sign, described as a perfect addition to a lawn or garden.

We decided to segment the mailing list into "warm" and "warmer" prospects. The 4,629 warm prospects were people who had signed petitions and who had opened e-mails but not clicked through on the links embedded in the messages. That mailing garnered 54 responses—a response rate of about 1.2 percent. Even in good economic times, this is considered an excellent response to a direct mail acquisition piece!

The "warmer" list contained 1,080 people who had opened their e-mails and clicked on one or more links. If we had a phone number for a person in this group, we also made a follow-up phone call, which helped boost the overall response rate for this group to 21 responses—a 1.9 percent response rate within three months after the mail drop. By reaching out to prospects who were slightly more familiar with our work, both by mail and by phone, we got better results.

It's the E-Mail Relationship…

The two rounds of letters, in addition to the follow-up phone calls, showed that our e-mail communications built a strong relationship with prospective donors that resulted in a highly successful snail mail acquisition campaign. The e-mail lists did not cost anything outside of our regular program costs, and because the mailing was done entirely in-house by volunteers and our response rate was so good, the acquisition cost per member for the "warm" lists was lower than for the "warmer" list—about $20 per member.

The cost per member gained for the "warmer" list was higher at $38 because we hired a professional to make the calls. The Pesticide-Free Zone sign added costs, and in the future we will have the additional cost of a mail house to process large mailings. For this reason, member retention will have an important financial incentive.

Typically, one sees response rates in the 1 percent range only with lists that come from other nonprofits with similar missions and proven givers. Although our prospects were not proven givers, we assume they gave generously because of their existing relationship with NCAP, including the benefits they receive from the organization's efforts. Our experience proves that a combination of strong e-mail communication and a traditional direct mail program can result in new members at a reasonable acquisition cost.

NCAP's successful acquisition program shows that in spite of fears about the tumbling economy, people still care about and give to organizations that are working to change the world for the better. ■

Katie Schuessler is membership coordinator at the Northwest Coalition for Alternatives to Pesticides.