

Grassroots Fundraising Journal

VOLUME 29 NUMBER 2 • MARCH–APRIL 2010

A PUBLICATION OF



Broaden Your Donor Base To Deepen Your Impact



- Inviting Clients to Be Donors
- Direct Mail: Down but Not Out
- Using Organizing to Build Membership
- How to Take Advantage of Changing Demographics in Fundraising
- Welcoming Your Friends' Friends

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St. Peter's Housing Committee, which has now merged with Just Cause Oakland (cjjc.org), builds the leadership of their members and clients through both fundraising and organizing. Here, members rally in support of the Renters Economic Relief Package in June 2009, which would have helped tenants afford rents as the economic crisis reduces wages and jobs. The package was approved by the San Francisco Board of Supervisors but was vetoed by Mayor Gavin Newsom.

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Inspiration and Hope During Troubled Times

By Jennifer Emiko Boyden

WAR. RECESSION. GLOBAL WARMING. Corporate welfare. Budget cuts. Natural disasters exacerbated by neocolonialism and militarism. In the face of these crises, many of us are searching for reasons to be hopeful and for solutions to these problems that are so much bigger than any one of us. And in this search for inspiration and the ability to make a positive impact, many people are joining organizations, as members and/or as donors.

Although some fundraising experts suggest that now is not a good time to reach out to new donors given the economic climate, many people are actually hungry for inspiration and a chance to make a difference. Also, continually searching for new donors is essential to the health and sustainability of our organizations.

With the goal of inviting more people to join our efforts, this issue of the *Journal* focuses on finding and building relationships with new donors. Fundraising consultant Rona Fernandez kicks off the issue by reminding us to not overlook our clients as potential donors, and provides steps for how to respectfully invite them to give. Next, Amy O'Connor suggests ways to optimize your direct mail response, and cautions against abandoning this tried-and-true strategy, with ways to customize your mailings to avoid the declining response rates of the standard approach. Amy partners with long-time *Journal* contributor Andy Robinson to feature Iowa Citizens for Community Improvement, demonstrating how their organizing work has built their membership base, increased their individual donations and decreased their dependence on foundation funding. An article by former GIFT Executive Director Mike Roque offers tips for how we can incorporate demographic shifts in the U.S. into our program and fundraising plans to better serve our communities, expand our pool of supporters, and strengthen our work. Finally, Nzinga Koné-Miller rounds out the issue with an email strategy for converting your friends' friends from one-time donors to repeat supporters.

A few housekeeping items: There have been some technical glitches with accessing the online *Journal* archive, and we apologize for the inconvenience. If you are still having difficulty or have not received an email with instructions for accessing the archive, please email jennifer@grassrootsfundraising.org and I'll walk you through the process.

If you'd like to update your contact information or change your delivery preferences for the *Journal* and/or renewal notices, please email info@grassrootsfundraising.org or call us toll-free: 888-458-8588 x304. Please don't hesitate to get in touch if something isn't working for you.

Finally, we have a correction to make from the Jan-Feb 2010 issue. On page 5 we wrote, "...to qualify for nonprofit bulk mailing rates, each letter has to be identical, which literally means you can't have a separate name/address/salutation for each one." This is actually not the case. Personalizing letters does not disqualify you from nonprofit bulk mailing rates, as long as it's done electronically and not by hand.

Until next time, here's to keeping hope and inspiration alive for ourselves, our donors, and the movement!

The cost of publishing the *Journal* is covered solely by subscriptions and donations made by people like you. Please help us continue this great resource! Subscribe, renew, or make a donation today at grassrootsfundraising.org or by calling 888-458-8588 x304.



Fundraising in Your Own Back Yard: Inviting Clients to Be Donors

By Rona Fernandez

PHOTO BY BRIDGET KANE

A Women’s Community Clinic health worker speaks with a client.

IN MY WORK AS A FUNDRAISING CONSULTANT, I’m always surprised at how many nonprofits overlook what seems to be an obvious source of new donor prospects: the people who are served by or are most involved in their program work. For most grassroots organizations, these key constituents are often the backbone of their donor program, but for many other groups, their clients or members are rarely (if ever) asked for money, and they rarely fundraise for the organization either. If your group is one whose donors come mostly from outside your core constituency, then the good news is that you probably have a whole other pool of people you can tap to make your grassroots fundraising program more successful: the people served by your program.

It’s not surprising that the people directly affected by your program work would make good donor prospects. In her November/December 2009 article for the *Journal*, “Silos Are for Farms,” consultant Tina Cincotti quoted researcher Penelope Burk’s finding that 93 percent of donors volunteer, and 95 percent of volunteers give money to the organizations they volunteer with. Although statistics for client-based giving are not available, we know anecdotally that the people who benefit the most from your services—whether you provide free health care services or free legal advice, as the two groups that are profiled

in this article do, or some other low- or no-cost service—would also want to support your work financially.

I spoke to the directors of two San Francisco organizations that have regularly raised several thousand dollars each year from their client base: Belma Gonzalez, former executive director of what was then called the Women’s Needs Center (now the Women’s Community Clinic), and Marianna Viturro, co-director of St. Peter’s Housing Committee. Their stories affirm some of the most basic principles of grassroots fundraising in powerful and inspiring ways.

The Women’s Needs Center was a free clinic that provided crucial reproductive health services to low-income women in San Francisco. Although the agency raised the majority of its income from non-clients through a canvassing program and direct mail, they also brought in an average of \$3,000 a month from client donations—more than \$36,000 a year. However, the original reason behind asking for a donation was not just a financial one—it was that the clinic needed to comply with federal funding requirements.

“As a licensed community clinic, we were supposed to get a co-payment from our clients,” says Belma Gonzalez, who was the executive director of the clinic for five years in the 1990s. “But as a free clinic, we didn’t want to require a co-pay from

folks or be seen as a sliding scale clinic. So, our compromise originally was to ask clients for the co-pay as a donation. The amount was based on the difference between what our funders would pay for the visit—which was based on the client’s income,

majority of people in the United States give money to nonprofits (about seven out of every ten people), and on average, about 60 percent of the total donations given by individuals in this country come from households with incomes of less than \$100,000

AS THE GROUP’S WORK CHANGED, SO DID THEIR FUNDRAISING STRATEGY—SHIFTING FROM BEING FUNDED MOSTLY BY GOVERNMENT AND LARGE INSTITUTIONS TO HAVING MORE INDIVIDUAL DONORS, INCLUDING THEIR CLIENTS.

and all clients were living below the Federal poverty guidelines—and what the visit actually cost.”

St. Peter’s Housing Committee, based in the Mission District of San Francisco, a working-class neighborhood with a large Latino immigrant population, provides free tenant counseling, mostly for low-income, Spanish-speaking clients. As at the Women’s Needs Center, these services are offered free of charge, but the organization also makes a donation request that has become a standard part of their work.

“It’s optional,” explains Mariana Viturro, co-director of St. Peter’s. “We have taped up on every computer monitor that we are supported by the community and that we suggest a donation of \$30. Most people give in that range because that’s what we put out.” The group receives about \$7,000 per year from these donations.

St. Peter’s is unique in that it started out as mostly a social service agency and over time evolved into an organization that both provided services and did broader advocacy, grassroots organizing, and movement-building to help preserve affordable housing in San Francisco. As the group’s work changed, so did their fundraising strategy—shifting from being funded mostly by government and large institutions to having more individual donors, including their clients, whose donations could be used to support the group’s broader agenda.

Drawing from these organizations’ experiences, here are five things you can do in your organization to find new donors in your client base. You may not be able to make these changes immediately or all at once, but by doing just one or two of these things you can identify many prospects who have been right in your own back yard all along.

Five Things You Can Do to Raise Money from Your Clients

1. Don’t assume that people won’t or can’t donate.

The underlying assumption that many people in social service nonprofits make is that their clients, who are often low-income people, don’t have any money to give. But the large

majority of people in the United States give money to nonprofits (about seven out of every ten people), and on average, about 60 percent of the total donations given by individuals in this country come from households with incomes of less than \$100,000

per year. Even about 20 percent of people who receive Temporary Assistance for Needy Families (formerly known as welfare) give money to charities.

“One of our monthly donors is a client. He gives \$25 a month,” says Viturro of St. Peter’s Housing Committee. “I think he makes \$1,500 a month. That \$25 is a lot for him.” If you assume that some people are just too poor to give or that they should spend their money on something else, not only are you robbing them of the opportunity to show their support and appreciation for your work, but you’re not raising as much money as you could be or bringing in all the donors who can and should be supporting your work.

2. Call it what you will...it’s still fundraising!

If program staff in your organization have a mental block around fundraising from your clients—which is common for many groups who are used to seeing their clients as recipients of services only—then by all means call it something else! It’s not as important that your staff identify as fundraisers as it is that they carry out the work of bringing in support for the organization.

Viturro’s experience at St. Peter’s has shown her that calling an activity “fundraising” may make it unnecessarily intimidating. “When I show people spreadsheets with dollar amounts, they just don’t relate to it and get bored and think, ‘Oh, it’s just the fundraising report and it has nothing to do with me.’ When we approach it more from how it relates to community-building and our services, it’s more effective. It makes sense program-matically in terms of bringing people into the organization—it’s just one of the ways to do that.”

At the Women’s Needs Center, Gonzalez says that staff never called their requests for donations from clients fundraising, but that looking back on the experience, she sees that it was definitely a way of raising money for the organization from its clients. Once the practice was firmly in place, however, staff saw the importance of having clients as donors. “Later,” she said, “we felt it was important for clients to be on board with us.”

3. Educate everyone in the organization about how much it costs to do the work.

All the people who care about your work (donors, board members, staff, clients, members) should have a sense of your budget size and what it costs to do the work. Not only is this a good way to build a more democratic organizational culture, but people will be more motivated to fundraise if they know what they are fundraising for and what kind of an impact the donations they bring can make. However, talking about money in your organization can bring up thorny feelings—and sometimes conflict—over how to handle fundraising activities.

At times these conflicts center on whether it's appropriate to even ask low-income people for money (see point #1 above), and can have more to do with staff members' own issues with money and fundraising than about whether clients want to give. Gonzalez emphasized the need for transparency with clients as a way to cut through some of these challenges.

"We would be lying to pretend that health care is free," she says about how she responded to staff concerns about asking for donations. "The value I advocated for was transparency," explains Gonzalez. "[I would suggest staff tell clients that] it costs us lots to be here and if you can help us out by donating toward what isn't covered for your visit by our funders, then you're helping to ensure your clinic will remain open."

4. Be respectful of and value each person's giving capacity.

"When folks made their appointment we let them know about the donation and we didn't ask for the donation until their visit was finished," says Gonzalez about the client donations at the Women's Needs Center. "And we made sure the front desk folks were gracious and respectful with folks if they couldn't give."

No matter the size of the donation, it's important to value all donations by your clients and core members, as these are the people who are most committed to your work and most likely to give repeatedly when asked. At St. Peter's, more than 300 of their clients (about half of the people they see each year through their free legal advice service) make donations.

"Some clients give every time they come. It may only be \$5 each time but by the end of the year it's \$120," says Viturro. "The most incredible donations are when people win a case [thanks to St. Peter's free legal help], which meant they got their deposit back or were compensated for some abuse in their housing.

There was one case with three tenants who were able to get their \$1,000 deposit back, and they each gave \$100 to the organization." Even small donations can add up if you are giving people multiple opportunities to give.

Gonzalez emphasizes the importance of getting clients to see themselves not just as recipients of services, but as part of your work, and to impress this attitude upon program staff, who often have the most contact with clients. "I always ask folks to think about how they feel when they contribute to something or help out in some way," she says. "How they then feel a part of something, and are not simply an outsider looking in, or a person being served."

5. Make fundraising a part of everyone's job.

Even if fundraising is not part of everyone's job description, every person—especially program staff, who often think of fundraising as something that happens 'over there' in another department, and not as part of their work—should be responsible for at least one key fundraising task.

At St Peter's, the counseling staff, not fundraising staff, are in charge of collecting donations from clients. "It's part of the counseling ask," she says. The counseling staff also do fundraising asks of the lawyers who volunteer their time to give legal advice to St. Peter's clients. "When new staff come on it's always part of the rap that we teach them, and in our client database there is information to put in about whether they made a donation and the amount."

At the Women's Needs Center, the front desk staff asked for donations. "The phone folks were taught to stress that it was a donation," says Gonzalez, "and to figure out what the donation would be with the client so she could be prepared to bring a donation if she could. If the client had no money it was OK." Gonzalez says that very few clients did not make a donation, and some gave more than the suggested amount.

The main lesson from these two organizations' experiences is that everyone who cares about your work should be asked to make a contribution to your work on a regular basis. Not only will doing so increase the number of prospective donors you have and the amount of money coming in, it will also increase people's feeling of ownership of your organization and make them feel more invested in your work.

"Most of the time people feel really invested and honored to be able to contribute," says Viturro. "It helps with their relationship with the organization, and they want to see other people have access to the services that they used." ■

Rona Fernandez is a fundraising consultant with Klein and Roth Consulting. Join Rona on March 16th to learn how to create a culture of fundraising at your organization. Call 888-458-8588 x304 or visit grassrootsfundraising.org/webinars to register today!

Direct Mail: Down but Not Out

By Amy O'Connor

THE ECONOMY IS IN A SLUMP. Foundation giving is generally down. People are hanging on to their money and those who are still giving are giving less. This is old news by now. Odds are that you've seen the same trends in your own organization.

Unfortunately, an argument that has been around for nearly 30 years has been resurfacing in these tough times. The argu-

ment goes that, due to rising costs and lower response, acquiring members through mass direct mail is no longer a viable strategy. (Members are typically individuals who make one or more monetary gifts or in-kind gifts to an organization. In some cases volunteers are also considered members even if they don't make a financial donation.)

LIKE THE ECONOMY AND MOST FUNDRAISING RESULTS, DIRECT MAIL MEMBERSHIP ACQUISITION IS CERTAINLY DOWN. HOWEVER, IT IS FAR FROM DEAD.

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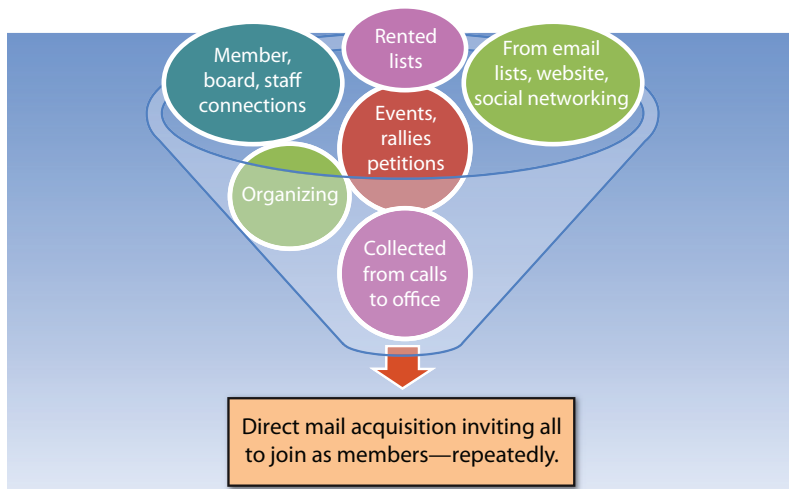
Like the economy and most fundraising results, direct mail membership acquisition is certainly down. However, it is far from dead, and nonprofits abandon this work horse at their peril. For the last 26 years, Ken Kerber of the Conservation Coalition, based in Marlborough, NH, has followed the response trends as he manages direct mail acquisition campaigns for state and regional nonprofits. He points out that "dollar for dollar, direct mail is still the most efficient way for organizations to obtain new long-term members. And without an ongoing influx of new members, membership revenue will start to shrink due to normal attrition." Whether an organization has 500 or 5,000 members, this advice holds true. However, at what scale the organization conducts direct mail member acquisition and how

personalized they make it will vary depending on their size and resources (see The Role of Personalization below). Because so many nonprofits depend on their supporters and volunteers for funding and political clout, this is not a time to give up on the most efficient way to acquire members. However, it is a time to use it cautiously and to make sure you understand

how direct mail works, which factors can increase its effectiveness, and how to raise more revenue while we wait for the economy to strengthen.

Lists: The Critical Ingredient

Because direct mail acquisition entails a significant up-front cost—whether in money and/or staff time—it is vital to maximize response. The quality of the lists used is still the most important element in predicting direct mail success. During better economic times, many organizations send mass direct mail (i.e., mailings consisting of relatively impersonal packages) that achieves 0.8-1.0% response rates and breaks even in two to three years, as new donors from the mailing give subsequent and greater gifts. At these rates, it is worth the cost of the mailing when taking into account the lifetime contributions of the new members. However, when response rates dip to 0.5% or below, it becomes difficult to justify using this type of direct mail because it simply takes too many years to break even on any given mailing to make it worth the investment.



organization's direct mail acquisition program. Once we have people's snail mail information, we must send them repeated acquisition mailings until the returns no longer justify mailing. Folks rarely respond the first time and we must give them multiple opportunities to respond over time. Sending a few acquisition mailings to a smaller list of people may be more cost effective both because the costs are spread out over the year and because smaller, hotter lists will be more productive.

By carefully collecting snail mail contact information at every opportunity and then funneling the information into the membership acquisition system, nonprofits can create productive lists for their direct mail acquisition campaigns.

The best way to increase direct mail success is to ensure that the lists used are well targeted, up to date, and "hot"—that is, they contain prospective members who are most likely to care about your issue or who have a personal connection to your organization. Instead of simply renting lists from or exchanging lists with relatively like-minded nonprofits, the current climate requires that we are always on the lookout for contact information from the most likely of prospects who will respond at dramatically higher rates than those seen for mass direct mail.

Look to these for the best sources for great prospects:

- Relatives, friends and acquaintances of staff, board, and current members
- Petition signatures from folks interested in your issues
- People who have attended your events (and whose contact information you've gathered using sign-up sheets, door prizes, and registrations)
- People who have called your office for information
- People who have used your services
- People who enter raffles and other prize drawings you host
- Activists who have written the legislature via software programs that track online activism tools and that allow you to collect snail mail information
- Rallies, meetings, or public events where sign-up sheets were available
- Prospective members and leaders who have been contacted by your organizing staff and volunteers

As shown in the illustration, all contact information from these and other sources must be captured and funneled into the

The Role of Personalization

While the lists we choose are very important to mailing success, it is equally important to remember that direct mail packages are produced on a spectrum from the most impersonal (often thought of as "mass direct mail") to the highly personalized. The more a mailing is personalized, the greater the return rate tends to be. The following elements, from the simplest to the more labor intensive, serve to personalize a mailing:

- Closed-face envelope rather than a window envelope
- Nonprofit stamp rather than post office indicia
- Letter salutation using first name
- First class, collector stamp
- Generic but hand-written notes (often accomplished with volunteer help)
- Personal notes from one or more persons the individual knows
- Letter from a person the individual knows
- Hand-addressed envelope

Note that some of these techniques, such as nonprofit stamps, can be automated and can therefore be used in mailings that go bulk rate at the post office. Others, such as hand-addressed envelopes and personal notes, can only be used on smaller mailings where hand labor is practical and bulk mail rates are not being used. Of course, regardless of how personalized a package is, every mailing must also have the essential elements of an acquisition package: a letter (industry standard remains four pages of text on two separate pages), a return card indicating suggested gift amounts, and a reply envelope into

which the return card easily fits. In addition, the letter must be well crafted, with an urgent message that relates to the prospect's self-interest; an emotionally compelling story to which the reader relates; clean formatting that selectively uses bold, italic, and indented text; and plenty of white space. In short, the package must be visually inviting and emotionally compelling.

Irresistible Premiums to Boost Return

In addition to using hot lists and personalization to succeed in today's funding climate, we can also boost returns by using pre-

few years, online acquisition has still proven relatively elusive to most small to medium-sized nonprofits. Large organizations with significant visibility (such as the Obama presidential campaign), urgent causes (such as Hurricane Katrina), or a high-profile human services component (such as Habitat for Humanity) tend to be the most successful.

Perhaps the most successful online member acquisition tools are those that allow your board, staff, and members to solicit friends, relatives, and acquaintances by email. A company called firstgiving.com, for example, makes it easy to set up personal

THE MOST EFFECTIVE PREMIUMS ARE RELATIVELY UNIQUE, BROADLY APPEALING, AND CLOSELY LINKED WITH YOUR MISSION.

miums. These are small gifts, limited in cost by IRS regulations, that organizations offer to send a prospective member if he or she joins and/or donates. Kerber points out that "premiums can boost return rates, but they are not foolproof. Some don't work at all. The ideal premium is one that's irresistible to your target audience. That may not be another mug, tote bag, or baseball cap because the most effective premiums are relatively unique, broadly appealing, and closely linked with your mission."

Considering the tight economy, attractive premiums these days can even include self-published coupon books for discounts from local businesses. These require some effort to compile, but Kerber emphasizes that discount books can help nearby businesses as well as the organization and provide a monetary benefit to donors. For example, a coupon book worth \$250 in discounts can often make a \$35-\$50 donation a much easier sell.

Other mission-related premiums are relatively inexpensive information booklets that can be printed locally. For example, a group working to eliminate toxins from the environment could offer a booklet about how to keep toxins out of your home. An organization protecting waterways from runoff could provide a how-to guide that helps prevent household and automobile chemicals from entering the water stream while saving money. And an organization working on getting at-risk kids a head start in education could provide information about how to engage children in games that teach particular lessons. The opportunities are virtually limitless for providing something of value to prospective members while also engaging them in your issues.

The Place of Online Acquisition

While online giving has increased dramatically in the past

fundraising pages for anyone who participates in this "inner circle" of solicitors. (See "Welcoming Your Friends' Friends" in this issue for more information on boosting the returns from these types of asks.)

The solicitors send an email to their personal email list and ask those being solicited to visit their personal fundraising page and to give to their organization. Although gift amounts per solicitor will vary depending on the organization, the campaign, and the means of those being solicited, each solicitor typically raises hundreds of dollars for the organization. However, the rate at which the new donors become members is yet to be determined. It may be that they have to be re-solicited by their contacts in order to give to the organization again.

Proceed with Caution—But Keep Mailing

Although this is a time to be cautious, it is definitely not a time to give up on direct mail completely, for that will simply translate to declining growth and revenue for your organization in the future. Organizations also need to be ready to gear their fundraising program up as the economy improves and people have (or feel that they have) more discretionary money. You may want to tighten up your current acquisition program, increase the level of personalization, test an "irresistible" premium, collect contact information for the more likely prospects, and mail fewer packages less often.

As times get better on the economic front, be sure to increase your direct mail acquisition efforts so that you will have the volunteers, donors, and activists you need to achieve your mission in the long run. ■

Amy O'Connor (integrated-development.biz) is an organizational development consultant and trainer based in Salt Lake City, Utah.



PHOTO BY STEVE FRY, FRYGUYIMAGES.COM

Iowa Citizens for Community Improvement members head to their state capitol in January 2009 to rally for campaign contribution limits, access to higher education for immigrant students, and local control and tougher standards for factory farms.

Always Be Asking

Using Organizing to Build Membership

By Amy O'Connor and Andy Robinson

IF YOU CAN IMAGINE A REALLY LARGE PRISON crammed with livestock—chickens, pigs, or cattle—you’ve got some idea of what a factory farm is like. Thousands of animals stand in their own waste until the employees—often low-wage immigrant workers—hose it into large, foul holding ponds. These practices are not only hard on the animals and the workers, they’re also hard on the neighbors, the land, and the water they depend on.

Iowa Citizens for Community Improvement helps local communities fight back on social, economic, and environmental justice issues, including the impacts of factory farms. Iowa

CCI members organized to counter intensive pressure from the Farm Bureau and other special interests as citizens sought to protect Iowa’s water quality. The resulting victory took their opponents by surprise—the new legislation was even stronger than the original rule that Iowa CCI had been working to pass. Without a large and active membership, it never would have happened—and without an aggressive “ask” program, the organization would never have built the membership base needed to win.

People Power Is the Key

Since 1995, Iowa Citizens for Community Improvement has recruited and engaged more than 3,000 members (see Figure 1) on a wide range of issues. (The recent decline in membership is discussed below.) In addition to factory farming, these include excessive interest on pay-day loans, reducing corporate influence in politics, and non-payment and abuse of undocumented workers. As member Judy

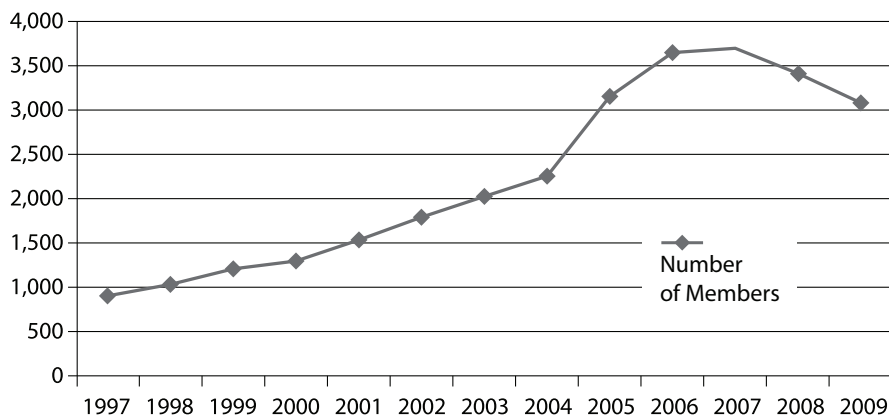


Figure 1. Membership Growth at IA CCI, 1997-2009

Lonning says, “I’m so impressed with the way we get things done. When we work together we have tremendous power to advance the cause of justice, and CCI empowers us to stand together on critical issues.”

The group’s philosophy of membership development makes it particularly effective. As Katie Bryan, membership and communications co-coordinator, points out, “Our theory of social change is that the people most affected by issues should be in the driver’s seat. We believe in people power versus staff power.” Member Francisco Contreras adds, “The open line of communication between members and staff is key. Also key is having members be involved in the leadership and planning process.”

Member Growth and Engagement: It’s All About Organizing

Everyone at Iowa CCI understands that increasing their membership and engaging members in meaningful organizing are essentially the same work. Staff ask people to join at every opportunity. In addition to regular mass mailings, the group recruits new members in the following ways:

- Organizers make it clear that membership is required for anyone wanting to work on an issue: a minimum of \$25 per individual, \$35 per family. Introductory letters and conversations make this precondition clear to prospective leaders.
- At house meetings, organizers ask for membership, explaining that they’re building a movement beyond the particular issue in question. On average, 70% of house meeting participants join.
- The initial organizing meetings are typically followed by larger community gatherings. Here organizers or seasoned leaders make another pitch for membership. As Kristin Schaaf, membership and communications co-coordinator notes, “They [long-time members] do direct asks better than staff.”
- Once people who are not yet members have taken action, such as writing to legislators, staff members send them an invitation to join. People who do not respond initially are included in future mailings until return rates no longer justify the effort.
- The organization has four staff teams that compete at recruiting new and lapsed members. Regular team check-ins and inexpensive prizes—“from the discount bin at Target,” Schaaf says—help everyone stay focused and make the friendly competition fun.
- The group asks for membership at their annual convention attended by 200-300 people. Once people attend, they usually join.
- Action alerts are distributed via email, social networking sites, and Iowa CCI’s website. After responding to an action alert, activists are offered the opportunity to join online and are added to the organization’s database. Because people are required to include their snail mail addresses when emailing their legislators, Iowa CCI receives all the contact information needed for acquisition mailings.
- Membership invitations are sent to everyone who signs a petition or calls the office for information.

It All Adds Up to a Big Membership

Through steady growth, Iowa Citizens for Community Improvement doubled its membership to 2,000 between 1997 and 2003. Then it shot up to more than 3,000 members between 2004 and 2007. The significant growth and retention of membership was the result of a very diversified acquisition and cultivation program as outlined in Figure 2, which shows a snapshot of 2008 membership acquisition. Note that organizing-related efforts bring in nearly the same percentage of members as traditional, mass member-acquisition mailings.

Figure 2. IA CCI Acquisition and Cultivation Program, 2008 Results

| Action | Total | % of total |
|--|------------|---------------|
| Large mass acquisition mailings | 323 | 43.4% |
| Organizing | | |
| In-house acquisition mailings | 111 | 14.9% |
| Meetings | 110 | 14.8% |
| Unsolicited members - most from organizing | 43 | 5.8% |
| Action alerts | 35 | 4.7% |
| Direct asks | 28 | 3.8% |
| Complimentary membership | 23 | 3.1% |
| Newsletters | 23 | 3.1% |
| Gift memberships | 23 | 3.1% |
| Friends (members asking others) | 13 | 1.7% |
| Events | 7 | 0.9% |
| Other | 3 | 0.4% |
| Presentations | 2 | 0.3% |
| | 744 | 100.0% |

While about 44% of new members were acquired from mass direct mail, an equal percentage joined through the group’s organizing efforts. The remaining 12% came from a combination

of events, organizational communication, and member efforts.

As a result, Iowa CCI is now far less dependent on grants than many comparable organizations. In 2008, they received only half of their revenue from foundations (see Figure 3). This kind of independence is especially important during the current recession, when foundations are cutting back.

Figure 3. IA CCI 2008 Income Sources

| Revenue Source | % of total |
|----------------|------------|
| Foundations | 50.6% |
| Businesses | 7.2% |
| Individuals | 17.2% |
| Churches | 10.5% |
| Government | 6.3% |
| Events | 3.6% |
| Other | 4.6% |

Maintaining and Increasing Membership: It's Not That Simple

Starting in 2007, the organization noticed that membership was leveling off and then declining. Kristin Schaaf says, "We'd always grown! Seeing a decline in membership was difficult, as we depend on members for winning our issues. We needed to evaluate our tactics." They discovered a number of reasons that, as the membership grew, it became more difficult to sustain that growth:

- Because 60% of members typically renew from year to year, the larger the membership, the more members you have to acquire just to replace those who drop out. One of the challenges of success: to keep expanding the base, you have to find ever more people.
- Some new-member acquisition tactics didn't work. For example, most people who received complimentary memberships didn't renew.
- Fewer new members from mass mailings renewed after the first year than they did in subsequent years. Although a respectable 50% renewed after the first year, even more of those people renewed in the second and third years. However, the overall effect is to reduce renewal rates, thus requiring more new members to replace those lost to attrition.
- Iowa CCI's Latino members don't renew through direct mail as frequently as other demographic groups, despite

receiving mailings in Spanish. Staff conjectures that this group represents a more transient population as well as one that simply responds better to face-to-face asks. Turnover among organizers also affected renewal rates in the local Latino community, since organizer-member relationships often need to be rebuilt before members will renew.

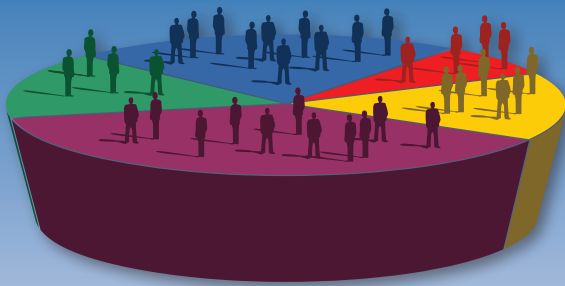
Next Steps in Building the Membership

As they look to the future, Iowa Citizens for Community Improvement is emphasizing the following membership-building strategies.

- Continued focus on inviting membership at every opportunity. Iowa CCI has done a remarkable job of creating a "culture of fundraising" where everyone on staff is an asker, and everyone asks all the time.
- Using members to find more members. The next step in deepening this culture is to expand the pool of askers: 3,000 supporters equals a lot of potential askers. If only 5-10% of the members could be actively engaged in fundraising, the membership base would continue to grow.
- Continued personalization. As every fundraiser knows, the closer you get to the donor, the more money you raise. By strengthening and deepening contact with members, Iowa CCI expects higher renewal rates and larger gifts. These are some of the strategies they are using to increase personal contact:
 - Volunteers call new members to thank them for joining
 - Staff call \$100-plus donors
 - Board members call \$500-plus donors
 - Hand-written notes on appeals and renewals
 - Phone banks to lapsed donors
 - Personalized envelopes to major donors
 - Face-to-face visits with 5-10% of their most generous members

As she reflects on Iowa Citizens for Community Improvement's membership and organizing successes, Katie Bryan says, "Everything ties back to our organizing work and our reputation as a group that tackles tough issues and gets things done. We don't let up. The same can be said about our approach to fundraising and building the membership." ■

Amy O'Connor (integrated-development.biz) and Andy Robinson (andyrobinsononline.com) are consultants and trainers based, respectively, in Utah and Vermont. Both are long-time contributors to the *Journal*.



How to Take Advantage of Changing Demographics in Fundraising

By Mike Roque

THE ETHNIC AND RACIAL MAKEUP of the United States has been steadily changing, with the number of people of color increasing much more quickly than the number of whites. Whereas in the 2000 Census people of color accounted for 30 percent of the U.S. population, by 2050 people of color are projected to outnumber whites throughout the U.S. They have already done so in several states and cities, both large and small. The largest increases over time will be in the Asian/Pacific Islander and Latino communities. The black population will increase more slowly, while growth in the non-Hispanic white population will decrease somewhat.

These trends, along with the fact that members of communities of color are more likely to be younger than those of white communities, have profound implications for fundraising. The younger median age in communities of color translates into emerging economic clout—and more potential donors—for this population.

The annual income gap between whites and communities of color is also narrowing. Although the wealth gap remains, the much talked about “intergenerational transfer of wealth” between World War II-generation parents and baby-boom-generation children will include many people of color whose parents benefited from the civil rights victories that brought affirmative action policies and access to higher education.

Many mainstream nonprofit organizations have recognized that their (largely white) donor bases are aging and they are developing planned giving campaigns that speak to their donors’ life situation. These groups are also making concerted efforts to attract younger donors from more diverse communities, but few are culturally competent to reach them or have staff and board members that reflect this population, nor have they changed their programs to focus better on the needs of these communities.

Organizations that do serve communities of color are therefore poised to make big gains in donor growth if they lay the foundation now for a strong individual donor program.

People of Color as Donors

There are many studies on donors of color, largely focused on why they give and how much they give compared to whites.

Studies on why people of color give reveal similarities among them and between them and white donors: they want to give back to the community and to institutions that have helped

them or their families, they have a strong preference for being asked by someone they know, and they have a strong connection to religion, which has a direct correlation to giving.

Finding common themes in reports of how much people of color give is trickier. Some reports state that people of color are less generous with time and money than are whites. Others find that education and income are more important factors in size of gifts than is ethnicity and that giving would be comparable between people of color and whites if education, income, and other factors were all accounted for. For others, the differences are in the recipients. The authors of *Philanthropy in Communities of Color* state, “The amount of giving by people of color may be roughly consistent with that of whites, relative to personal resources, but the forms and beneficiaries of people of color giving may be quite different.”

As a fundraising trainer, I have worked primarily with people-of-color organizations all over the U.S., and I spend a lot of time dispelling myths among people working in communities of color about the lack of philanthropy in their own communities. I often hear from the groups themselves, “Our people don’t give.” “Latinos don’t give.” “Blacks don’t give.” We need to shift the conversation away from incorrect perceptions that people of color don’t give to focus on how to reach people of color as donors.

Giving USA reports that 95 percent of households where people are asked to give do give, but that only 56 percent of households are asked. Another report states that people of color are disproportionately not asked to give or volunteer. It theorized that this factor—more than any other—may account for differences in giving percentages.

I want to change the thinking that “People of color don’t give” to “People of color aren’t asked to give.” In trainings, when people say “Our people don’t give,” I ask them when was the last time they asked. Even in nonprofits serving people of color, many have never asked their people to give. As Kim Klein says, “Fundraising success is in the asking. Ask enough people and you will raise the money you need.”

Taking Advantage of the Change in Demographics

Is your organization poised to take advantage of this upcoming change in demographics and ready to rethink how to acquire more people of color as donors? Start by answering some of the following questions.

Do you know the age, race, and other demographics of your donors?

Organizations should conduct a donor survey at least every three years to learn who their current donors are and their interests. Surveys should be brief and anonymous, and can be conducted easily and inexpensively online. Ask your donors for demographic information such as age, race, ethnicity, income, and number of children. Ask for giving information, such as how much they give to your organization, who else they give to, how much they give to other organizations, how long they have been giving, and why they give. You can then use this information to shape your fundraising and communications with donors. For example, older donors with no children are good prospects for planned giving. Or if you find that many of your donors are giving to the same organizations, you might want to consider trading mailing lists with those groups to acquire new donors.

Is the diversity of your community reflected in your staff, board, programs, and publications?

Organizations that have not diversified to keep up with the changing demographics of their community will have a much harder time building trust, reaching new networks, and proving their relevance. If people of color are only treated as service recipients rather than as leaders in your organization, you may be sending a message that you don't view people of color as potential donors. By asking people of color to give, we are including them in the governance of our organizations. If you want people to take ownership, it is always easier to build the house together than to be asked to live in a house others have built. No matter how much the owner tells you that it is your house too, you will almost always feel like a guest.

Are your fundraising strategies culturally competent?

People of color tend to be younger, more transitory, and have lower incomes. They may be more comfortable giving in cash. For example, fewer than half of Latinos have checking accounts compared to 90 percent of whites. There may also be language and cultural barriers. Mailing an appeal letter only in English with a remittance envelope may not be as successful as strategies using in-person contact, the option to give cash, or a bilingual letter from a respected member of the community.

Do you have an active planned giving program?

According to the Planned Giving Roundtable, planned giving is the fastest-growing segment of the fundraising sector. If you are not asking your most committed donors to consider planned giving, you can rest assured that other organizations

are. A planned giving campaign can range from simply suggesting language for bequests in newsletters or brochures to having financial advisors on planned giving strategies and paid staff who work with donors.

Are you moving to more online communications with your donors?

With younger donors, it is critical that organizations develop marketing strategies that are more comprehensive than a quarterly mailed newsletter. Websites and eNewsletters should be kept up to date with fresh information about programs and activities. They should be used to profile clients and show how your organization serves the community and is changing lives. Use email blasts, Facebook, and Twitter to alert your donors about upcoming threats, actions, and victories. You can also conduct real-time surveys about your programs and strategic direction online. Develop a communications strategy that keeps donors informed and active in your programs, but don't overwhelm them with useless updates.

Do you use Census data in your planning?

Utilizing data such as that provided by the U.S. Census Bureau (census.gov) can help with planning your fundraising and programs not only today but in the future. Your organization can get ahead of the curve by using these changing demographics to build your donor base and target your programs. For example, if your organization serves seniors or at-risk youth, it is important to know not only where they live today but where they are projected to be in ten and twenty years. Also, you need to know if their numbers are growing or shrinking and what other services are available to them. The Census Bureau information is easily the most comprehensive source of data we have about people in the United States. If you are not using Census data in your organizational strategic planning you are missing out on a valuable free resource.

Conclusion

Demographic changes throughout the U.S. are happening very quickly and will affect how fundraising is done in the future. Make sure your organization is ready. If you use the available data to develop your fundraising and programmatic strategies, you will increase your organization's impact in your communities and help create a more just society. ■

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Welcoming Your Friends' Friends

By Nzinga Koné-Miller

CAMPAIGNS AND EVENTS that harness the power of your supporters' networks by getting people who are already engaged with you to advocate on your behalf can be tremendously successful. But the question arises: How do you keep these friends of friends engaged with your organization after their initial donation has been made? You can start by welcoming them to your list.

Many of these friends of friends are probably not going to become long-term supporters. They give for a variety of reasons, perhaps with just an inkling of interest in supporting your specific organization. But once they give, many of them end up in the midst of a communication stream from your organization that assumes too much—especially that they know who you are and that they care about your issue—and that bypasses the niceties that are important to building any relationship.

When you're trying to get someone who doesn't know you to stick around for a while, find out more about you, and—you hope—decide they want to continue their relationship with you, a good introduction might be your one shot at doing it.

There are a number of things to consider about how to introduce new people to your organization, but let's focus on how you should welcome these new donors to your list. First things first, of course—make sure you'll actually be able to contact these new donors. Not all online tools and/or settings allow you to communicate back to these new donors. Whether you're setting up a campaign using Causes on Facebook or managing an offline event using your ASP's toolset (such as Blackbaud Sphere, Democracy in Action, or Convio), make sure your new donors can opt-in to receive your communications. If your tools don't allow this access and you have the option of going with another solution that does, do so.

If you don't have a way for new donors to sign up to hear from you, you'll need to get creative. Brainstorm a compel-

ling (but topical) case for them to join your list, and promote it wherever your toolset allows—on the donation confirmation page or automated confirmation message.

The Honeymoon Series

Once you've determined a way to contact these new donors, carefully consider how you'll welcome them to your email list and introduce them—in your own words—to your organization. A “welcome” or “honeymoon” series of emails is one way to quickly engage new list members when they're likely to be most receptive. These email messages should be written in advance and launched on a rolling, automated basis if your tools allow. Barring that, they should be sent in weekly batches.

Typically, a honeymoon series seeks to move people up the ladder of engagement—converting list members into activists, activists into donors, donors into recurring or repeat donors, and so on. In the case of friends-of-friends donors, consider a welcome series with a twist—you're trying to convince someone who has already jumped ahead on the engagement ladder by donating to engage further with your organization. You could argue that these new donors haven't truly engaged with you yet. They've shown up in the way most organizations would like their supporters to show up—by donating. But most of them are doing it more for their friends than they are for you.

The first email

Your first email in your honeymoon series should welcome these new donors while referring to how the initial “introduction” was made. Think of it this way: when you contact someone you've met through someone else, you usually remind them of how you met: “Hi, Amanda introduced us the other day because she knew we had some interests in common.”

Keep this memory-refresher in mind when crafting the very

INSTEAD OF SENDING THE TYPICAL CONFIRMATION RECEIPT, TAKE ADVANTAGE OF THIS OPPORTUNITY TO START WITH COPY THAT ECHOES HOW THE PERSON WAS INTRODUCED TO YOUR GROUP.

first email this new donor will receive from you—the donation confirmation (which will ideally be generated automatically after the donor makes their gift). Instead of sending the typical confirmation receipt, take advantage of this opportunity to start with copy that echoes how the person was introduced to your group. You may not know exactly what their friend told this donor about you, but in many cases your organization will have provided copy and talking points for emails or conversations relating to your campaign—refer to those when deciding what to say in this email.

In order to engage the person you've just been introduced to, focus on one of the most compelling—but genuine—aspects of how your organization makes a difference in the world. If your tools include a database field from which you can merge the name of the person who introduced the new donor to you, incorporate that name in this email. Here's a sample:

Dear Jane,
Thank you very much for your donation to the Watershed Foundation.
I'm so glad that Amanda shared our work on [this campaign], and I want to tell you just a little more about how your support will be used to [save the world]—**[fill in some details about campaign and outcomes]**.

The second email

Send the second email in your series within two weeks of a new donor's gift. This email should strive to engage the donor in a slightly different way. Be personable—and personal. Remind them again of the introduction, and reiterate the name of the person who introduced them to you if possible. Tell a success story about your organization: the story of someone who has been helped by your work...the difference you've made in a community...the encounter you had with someone who told you how your organization's work changed their thinking for the better.

Consider also including a couple of other brief highlights about your online presence, with at least one of them offering a way for the new donor to engage immediately. Link to the most compelling and current content on your website or your most highly trafficked online action.

The third email

The third email, which you'll want to send within a week and

a half of the second, could be a cultivation piece—your most recent eNewsletter or other online update with a very brief, personalized note above the main content:

Hi John,
I want to thank you again for making a donation in support of our second annual Summer Book Drive. I thought you might be interested in knowing what we're up to this month, thanks to the support of donors like you.
Abbe

After the Honeymoon

After sending the honeymoon series, you have a couple of options for continuing your contact. If you have the tools and resources, consider trying both options and tracking how each performs for your organization.

One option is simply to merge your new donors into your communication stream and treat them like the rest of your list. This approach is the easiest, though depending on the frequency and nature of your communications (and your new donors' interest levels), it may also be the least effective at transitioning them to engaged members of your larger list.

A more complex and time-intensive alternative is to maintain these friends-of-friends donors as a separate segment and limit the number of emails you send to them, providing them only with your most compelling content (at least once a month) until their behavior suggests that they're interested in hearing more from you.

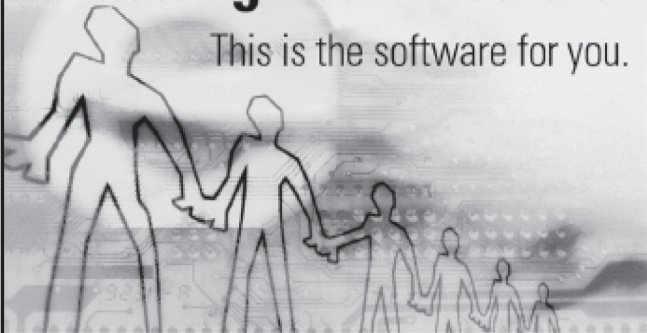
For example, if a subset of the new donors who receive your bimonthly eNewsletter click through to take the action featured in last month's content, they're expressing an interest with their action. It's not a guarantee that they'll want to see everything you might send to them if you then incorporate them into your regular communication stream, but it could mean that any time you have an update, action item, or appeal related to that topic, they should be included in your recipient list.

While a honeymoon series isn't likely to turn all your friends' friends into core donors and activists, this approach will help lay the groundwork for developing a relationship with these donors that lasts beyond a single transaction. ■

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.

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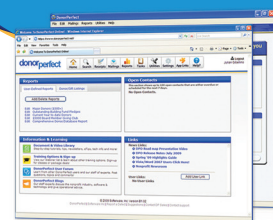
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