

# Grassroots Fundraising Journal

VOLUME 30 NUMBER 4 • JULY–AUGUST 2011

A PUBLICATION OF



## Work Smarter, Not Harder



Develop Fundraising Leadership  
Solidarity & Collaboration in the South  
Raise \$500,000 Without a Development Director  
Letter From a Departing Development Director  
Creative Ways to Finance Training & Consulting  
Conveying Your Organization's Benefits

Visit us online at [grassrootsfundraising.org](http://grassrootsfundraising.org)



## FEATURE



### 2 Developing Leadership for Fundraising

by Marjorie Childress

The departure of an executive director naturally raises questions about carrying fundraising forward. The SouthWest Organizing Project learned that succession planning for shared fundraising responsibilities even before a transition makes the process far easier.



### 5 We Are Stronger Together: Active Solidarity & Collaborative Fundraising in the South

by Stephanie Guilloud

As the anchor and fiscal sponsor for the US Social Forum of 2007 and 2010, Project South drew on the history of successful Civil Rights-era fundraising strategies to create a collaborative model that lifts fundraising beyond individual organizations to strengthen the movement.

### 8 How We Raise \$500,000 Without a Development Director

by Yael Falicov

See how an organization of five, mostly part-time, staff members divide up their fundraising responsibilities to jointly bring in all the money their organization needs.

### 10 Dear Director

by Stephanie Roth

Wish you could say what you're really thinking? Former Journal editor Stephanie Roth writes the letter many development directors wish they could send their executive director. If heeded, it might reduce the high turnover of development staff in nonprofits.

### 12 Ten Creative Ways to Pay for Training and Consulting

by Andy Robinson

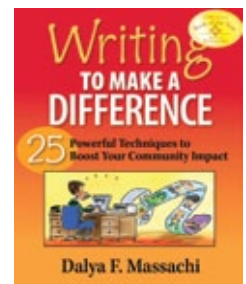
Want to develop your organization's fundraising capacity but don't have additional funds to cover the costs? Andy Robinson offers ten practical ways to get the training, coaching, facilitation, or consulting services you need.

### 14 Making Your Case: Writing from the Donor's Perspective

by Dalya F. Massachi

Dalya Massachi suggests a subtle but powerful shift in thinking about what will appeal to your donors.

Expressing how your work satisfies their deeper needs for involvement, community, and recognition will infuse your writing to donors with new meaning.



### On Our Cover

Members and staff of the SouthWest Organizing Project (SWOP) at a June 2010 Immigrant Rights Rally in Albuquerque, NM. SWOP organizes to build power in historically disenfranchised communities through leadership development and direct grassroots organizing. In this issue's feature article, SWOP's Director of Strategic Communications, Marjorie Childress, describes how creating shared fundraising responsibilities in advance of their executive director leaving contributed to a smooth transition for all.

A PUBLICATION OF



**Grassroots Institute  
for Fundraising Training**

The *Grassroots Fundraising Journal* is a bimonthly publication of GIFT.

**PUBLISHER EMERITA**

Kim Klein

**INTERIM EDITOR**

Priscilla Hung

**COMMUNICATIONS COORDINATOR**

Jennifer Emiko Boyden

**SENIOR EDITOR**

Nancy Adess

**GRAPHIC DESIGN**

Chris Martin

**COVER IMAGE**

SouthWest Organizing Project

**GJF EDITORIAL BOARD**

Will Cordery, Rona Fernandez, Dolores Garay, Yasmeen Perez, Megan Peterson, Khanh Pham, Randall Quan, Andy Robinson, Stephanie Roth

For subscription inquiries, to request permission to reprint *Journal* articles, and for advertising information, please contact: [jennifer@grassrootsfundraising.org](mailto:jennifer@grassrootsfundraising.org)

**GIFT STAFF**

Jennifer Emiko Boyden  
Communications Coordinator  
Ryan Li Dahlstrom  
Training & Network Coordinator  
Nan Jessup  
Finance & Operations Coordinator  
Thonsey Keopanya  
Resource & Development Coordinator  
Charles Ryan Long  
Executive Director

**GIFT BOARD OF DIRECTORS**

Yee Won Chong  
Jennifer Dillon  
Dolores Garay  
Jordan T Garcia  
Judy Hatcher  
Moncha Alba Lamb  
Sha Grogan Brown  
Steve Lew, Chair  
Tanya Mote  
Adriana Rocha

**GIFT:** 1904 Franklin Street, Suite 705  
Oakland, CA 94612  
PHONE: 888.458.8588 (TOLL-FREE)  
510.452.4520 (SF BAY AREA)  
FAX: 510.452.2122  
[info@grassrootsfundraising.org](mailto:info@grassrootsfundraising.org)  
[grassrootsfundraising.org](http://grassrootsfundraising.org)

Periodicals postage at Oakland, CA 94615  
023-243.

Postmaster: Please send address changes to

1904 Franklin Street, Suite 705  
Oakland, CA 94612

©2011 GIFT | ISSN No. 0740-4832



## Change is in the Air

Jennifer Emiko Boyden

**THE FIRST HALF OF 2011** has been quite busy for us GIFTers, especially as we've prepared to say good-bye to our Executive Director Priscilla Hung. Shortly after I started working at the *Journal*, Kim Klein and Stephanie Roth (founder and former editor of the *Journal*, respectively) often mentioned wishing they could convince Priscilla to become the publisher of the magazine when Kim stepped down. Priscilla had gotten her start in fundraising as a GIFT intern, and was on the *Journal* staff for a while before becoming the development director of the DataCenter. Then she took two years to travel and teach English in Asia. Kim and Stephanie mentioned how smart and competent Priscilla was, and how they looked forward to wooing her to work with them again. I had never met Priscilla, but with all the buzz I had to wonder, "Who was this woman?"

Soon Kim and Stephanie had successfully hatched their plan (not surprising, given their extraordinary persuasive powers) and Priscilla joined our staff as the publisher of the *Journal*. When Priscilla and I first "met" over the phone, I was struck by the sweet, unassuming voice coming through the speaker.

That was July 2006. Shortly after Priscilla started, GIFT and the *Journal* began merger negotiations and Priscilla has been serving as the director of the merged organization, GIFT, since 2007.

Priscilla has always approached supervising GIFT staff from a place of trust and support. She provides enough guidance to make sure we do a good job, but then steps back and allows us to work independently and build our self-confidence. Under her leadership, staff have grown in their positions, taken on new responsibilities, and the organization as a whole has thrived.

While not always the poster child for self-care, Priscilla has been the rock of the organization over the past five years. She has added new areas of work to her already overflowing plate (including editing the *Journal* when Stephanie left) and still managed to do everything—and not just do everything, but do everything incredibly well. So it's fitting that this issue's theme is "Working Smarter, Not Harder" because, well, Priscilla does both.

This issue is full of ideas and examples of how you can strengthen your fundraising efforts by some rethinking of how you organize the work. Our feature article describes how the Southwest Organizing Project successfully prepared for their executive director transition by creating shared fundraising responsibilities in advance of his departure. Next, Project South staffer Stephanie Guilloud shares their experience of creating a collaborative fundraising model that strengthens not just individual organizations but social justice movements. EcoViva, an organization that supports environmental sustainability, social justice, and peace for communities in Central America, also distributes fundraising responsibilities across their small staff, and Executive Director Yael Falicov explains how this structure is key to the organization's financial health. We follow Yael's article with an imagined letter to an executive director from a departing development director, actually written by former *Journal* editor Stephanie Roth. In it she offers her top five suggestions for achieving financial sustainability and a less stressed development team. Next, frequent *Journal* contributor Andy Robinson provides helpful tips for financing training and consulting that will help expand your fundraising capacity. And finally, Dalya Massachi explains how we can improve fundraising by writing about our organizations in ways that better convey the benefits we have to offer our constituencies.

We hope the experiences and ideas shared here will help you, too, work smarter as we approach the fall fundraising season.



# Developing Leadership for Fundraising



The People's Freedom Caravan, including SWOP members and staff, on their way to the 2010 USSF in Detroit, MI.

By Marjorie Childress

**AS COMMUNITY ORGANIZERS**, much of our activity at the SouthWest Organizing Project (SWOP) is designed to foster relationships, which makes fundraising, in theory, a natural fit. But we realized in the mid-2000s that our organization still had work to do in making the connection between organizing and fundraising in a way that resonated with our staff and members. We needed to build a culture of fundraising internally so that we relied less on one principal fundraiser.

This article describes how we created shared responsibility for fundraising and how that served us when the executive director moved on.

To move toward spreading fundraising responsibility throughout the organization, we instituted deliberate planning over a number of years to develop internal leadership for fundraising. This process was facilitated by the creation of a new leadership team that shared responsibility for programs.

Ultimately, this attention to internal leadership development served us well when our executive director transitioned out of the organization. To fill the void left by the departure of an executive director or other key fundraiser, a combination of staff and board members should be able to step up to the task.

In order to do that well, relationships with donors need to be spread out within the organization as a matter of course rather than waiting until a transition is announced.

As SWOP Co-Director Mónica Córdova says, “To spread out relationships with donors demonstrates strength in leadership and an understanding that the vision and strategy of the organization will exist beyond the transition of particular staff.”

## Creating a Shared Responsibility for Fundraising

SWOP has always undertaken small individual donor drives and builds fundraising into its events. But foundation relationships, as at many nonprofits, have generally resided primarily with the executive or co-directors. When just one or two people have the primary responsibility for such an integral and important facet of sustaining our work, those principal fundraisers spend a lot of time away from the programmatic work—both meeting with foundation staff and keeping the grant calendar functioning. At the same time, the concentration of fundraising expertise in just a few hands can potentially create a crisis if unplanned absences occur.

SWOP's former Executive Director, Robby Rodriguez, began

shifting to shared leadership in 2007, when he kick-started a restructuring of the organization that led to the creation of four team directors, including himself, who assumed authority for distinct programmatic areas. As directors stepped up their participation in the organization's efforts to acquire individual donors in our home state of New Mexico, we agreed we would refocus our efforts to instill a grassroots fundraising culture among our staff and board as a whole.

Meanwhile, Robby continued as our principal fundraising liaison to foundations while fostering the ability of other directors to develop their own relationships with funders in their particular program areas.

### Transition Planning for Fundraising

When Robby told the leadership team and board that he planned to transition out of the organization, it became clear that our attention to staff leadership development had created a strong cohort of internal leaders who could see the organization through the transition process.

Staff and key leaders in the organization had been supported to develop the confidence and ability to fundraise as part and parcel of community organizing. But we had also been working for a number of years to push out foundation fundraising to key staff leaders.

Although we had not been doing formal transition planning during the restructuring process we undertook in 2007, discussions about Robby one day leaving the organization occurred as we thought through the best way to share responsibilities for management of the organization and for fundraising.

"A number of years ago, we realized that we needed to spread relationships out in order for Robby to one day be able to move on without the organization suffering," Córdova explains. "That's when I began developing relationships with funders who were focused on youth organizing, which was my main area of work."

Other key staff members began developing relationships with funders a number of years ago as well.

"I was very reluctant to do foundation fundraising at first," Tomás Garduño, another co-director, says. "I didn't see fundraising as a part of the organizing work until Robby explained to me that fundraising, and especially foundation fundraising, is political. That motivated me to develop my abilities and build relationships with funders, just as we do with communities and ally organizations."

Those relationships were fostered by including directors on trips to conferences at which funders would be present, by seeking opportunities for directors to present on panels at national

gatherings about their work, and by ensuring that site visits with funders in New Mexico included multiple staff.

In addition to helping strengthen relationships between funders and staff, involving the broader staff in site visits is an important way to help staff members understand how the organization is resourced and to develop fundraising as an integral aspect of their work. For most of SWOP staff, fundraising means grassroots fundraising at events and with individual donors, who often come to the organization through particular organizing campaigns and therefore have more contact with the broader staff. But we've realized that it's equally important for our entire staff to understand the foundation landscape and to get to know at least some of our program of cers.

As an outcome, our funders have a deeper relationship with the organization as a whole. Perhaps equally important, more key leaders in the organization have the confidence that is necessary for fundraising from foundations and major donors.

### The Transition Announcement and Transferring Relationships

A leadership transition announcement is a tricky thing. By its nature, a change in leadership causes folks interested in the work of an organization to pay more attention. We understood that funders in particular would ask detailed questions about how we planned to sustain the work and the funding of the organization through the transition process.

We discussed at length exactly how and when we should announce the transition. We decided to do so in a series of announcements. First to be informed were our board and our staff, then our funders. By that point, we had thought through which of the leadership team should work with each foundation. The decisions were based on pre-existing relationships as well as program areas as natural fits.

"Being deliberate about transferring the relationships that Robby had with funders was key to a smooth transition," Garduño explains. "We began with email introductions to funders and insisted on a phone call with Robby, a leadership team member, and the program of cer to ensure that the relationship was transferred and that the funders knew who to contact."

While fundraising continuity was explicitly planned for, we also needed to raise funds in order to execute a smooth transition. Several of our funders supported the process with discretionary grants, which allowed us to pair back-up with Robby for a fundraising trip to visit some of our funders in person. We wanted them to meet their new contacts in person and to have an opportunity for deep one-on-one conversations about the future of the organization.



We also were also visited by other funders at our office in New Mexico. In our conversations, we encouraged funders to voice their perspectives about the organization and to ask detailed questions about our program as well as our transition planning. We agreed that we would keep them informed as our decision-making process proceeded.

### Implementing Shared Leadership

As our board undertook the work of making decisions about the next era of SWOP leadership, our leadership team absorbed Robby's duties and operated as an interim executive team. Early in 2011 the board decided to implement a shared leadership model with our programmatic teams going forward rather than resume an executive director model. (To read more about shared leadership and fundraising, please see "Shared Leadership: Creating New Models of Management," by Ruth Zerezghi, in *Grassroots Fundraising Journal*, Volume 29, Number 4; July/August 2010.)

This decision was a return in many respects to our roots, in that SWOP for most of its history has been led by co-directors. Each programmatic team has a director who is part of the leadership team. Through an explicit decision-making process, the

leadership team manages the organization as a whole and shares responsibility for strategic direction and principal fundraising.

Among the reasons for reverting to a shared leadership model was the recognition that by sharing fundraising among a team, our organization would be more secure going forward. We had also grappled for a number of years with the degree to which fundraising had required Robby to travel extensively, and we felt that pushing out that responsibility to multiple people would create a more sustainable approach to the work.

We've been gratified by the support we've received from funders as a result of our intentional relationship building with them and our attitude of incorporating funders as key allies in our work over time rather than simply as people to persuade. With allies, we build relationships, create vision, and seek change. So it should be with our supporters—both individual donors and foundations. ■

---

Marjorie Childress, Director of Strategic Communications at SWOP, is a member of the SWOP leadership team. She was previously SWOP's grassroots fundraiser and grants administrator, and she currently leads the team in which those duties reside.



## Is your website integrated with your fundraising database?



- ➔ Do you have **the tools** to offer **online donations**? **Online volunteer registrations**?
- ➔ Will those donations and volunteer registrations **flow seamlessly** into your database in **real-time**?
- ➔ Are they acknowledged **instantly** and **personally**?

Don't make your donors work to donate to you; make sure your website and your donor management tools are fully integrated and up to the task of meeting today's expectations.



**Secure Pages for Online  
Donations & Volunteers**



**Online data flows into  
FundRaiser automatically**



**Track, Process &  
Acknowledge activity**



**Report & Analyze  
Progress**



**800-880-3454 ext. 3**  
[www.FundRaiserSoftware.com](http://www.FundRaiserSoftware.com)  
[sales@fundraisersoftware.com](mailto:sales@fundraisersoftware.com)

Learn More: [www.FundRaiserSoftware.com](http://www.FundRaiserSoftware.com)
**800-880-3454 ext 3**



# We Are Stronger Together

## Active Solidarity & Collaborative Fundraising in the South

By Stephanie Guilloud

Georgia Citizens' Coalition on Hunger and Project South members on Poor People's Day 2011. Photo by Demetrius Jackson.

**IN A MOMENT WHEN BUDGET CUTS** are the new norm—from the U.S. Congress to our own family households—fundraising diversity is essential to social movement work. Scarcity, however, is not the right model. Now is the time to be creative, innovative, and most of all, collaborative.

When the dominant currents demand a fierce individualism in securing organizations, highlighting singular agendas and promoting survival-of-the-slickest attitudes, we must draw from our strongest principles of freedom movement history: You cannot do it alone. And we are always stronger together.

When forces in power began to slice away at the infrastructure of the Montgomery Bus Boycott in 1955, people did not just take notice. They acted. When Black taxi cabs were denied insurance so as to break the carpooling strategies that the boycott had set up, the largest Black-owned insurance company in the Southeast, Atlanta Life Insurance, took up the call. As resources were strained and money dwindled over the year-long boycott, political organizers Bayard Rustin and Ella Baker started a community fund, called In Friendship, to direct resources into Montgomery. These methods and collaborative strategies sustained the boycott, but more important, they linked people and organizations across the country to a local struggle that would spark movement work for the next two decades.

### **Being Generous with What We Have, We Can All Get What We Need**

The South is the poorest region in the country. There are dramatically fewer foundations based in and funding Southern social justice work than in other parts of the country. Our reality has always been based in poverty, and we draw from a wild resiliency built from centuries of struggle. Many foundations require a list of victories, like a shopping list, for their investment. But as actors building social movements in a complex world, we count our victories differently than one-year gains on strategies that are not always aligned with our realities.

In the South, our victories include the number of years that we are in relationship with one another and the breadth and depth of our investments in shared work. We look to each other for accountability, and we distribute money carefully.

### **Collaborative Resource Development Increases Power**

Political organizers and actors today do not have time to continue to bemoan the lack of resources, the freezing of foundation funds, and the competitive fundraising approaches we've tolerated for many years. Our purpose is higher than maintaining the budget lines of nonprofit organizations. Our purpose is to build social movements, to build power. And power requires autonomy, flexibility, and control.



We have the ability and competency to raise the money we need to fulfill our purpose without compromising our principles. In fact, raising what we need and fulfilling our purpose often go hand-in-hand if we apply community principles forged in our resilient responses to oppression, poverty, and isolation. Families look out for each other, and we stretch a dollar to make sure that everyone eats. Our survival is tied to one another's. We succeed in relationship to each other's success.

At Project South, we connect collaborative fundraising to our organizing efforts. Concretely, we invest in shared projects, shared infrastructure, and other resources. We throw joint fundraising parties, we support partner organizations, and we build alliances.

### **When You Have What You Need, You Determine Your Own Direction**

Project South was the anchor organization for the first US Social Forum, in Atlanta in 2007. When we began organizing for the Forum in 2005, we had to expand our thinking beyond foundations as the primary source of money. Similar to the social movements that came before us, we looked to each other to make the work happen.

Organizational sponsorships, registrations, and individual contributions became the core of our fundraising, bringing in more than \$30,000 for the Southeast Social Forum, held in Durham in 2006. The grassroots fundraising efforts created a surplus that allowed us to float the larger national project for several months.

We, as social movement organizations, invested in our shared project. We not only ensured that our members could attend and bring the program, we ensured that the Forum was directed and shared by the movements participating.

### **We All Gotta Eat**

In 2007, Project South collaborated with three other organizations to build a South by Southwest Freedom Caravan from Albuquerque to Atlanta for the first US Social Forum. During five days of a packed and exciting experience, we were collectively responsible for our members and families to eat every day. Though we could have provided vouchers or reimbursed lunches bought at fast-food or hotel spots near the meetings, we committed to rotating and sharing the food duty to provide one hot meal every day. Recognizing the power of our respective cultures, each day's meal represented a different legacy and tradition. We fed more than 800 people, eating Southwest chili one day, Mexican tacos another, New Orleans jambalaya, and a Southern fish fry. More than just a tactical solution to the lunch

question, the organizations shared resources, cultures, and a mutual responsibility for each other's members.

### **Parties, Projects, and Power**

Joint fundraising can take a lot of different forms. We come together to throw a party and split the proceeds. Each organization makes less money that way, but parties are always better when there are more people dancing. The event is informed by multiple ideas, attended by diverse communities, and people learn about what's happening in the community from multiple perspectives. Throughout our history, Project South has co-organized parties and events with other organizations in Atlanta and across the South.

"Sex, Wine, and Chocolate" was a successful joint fundraiser we co-coordinated in Atlanta in 2008 and 2009. Groups collaborated to produce an event space that connected positive sexuality to a good party. We created a compilation of audio interviews about desire, bodies, sex, and gender. The interviews were mixed with music, and we handed out the CD as an invitation and as a party favor. We auctioned off date night packages. The party introduced community-based entertainers connected to the theme of truth-telling and liberated sexuality. The event was a collaboration to experiment with exciting ways to connect queer politics and expression to our broader movement work. One without the other is just less hot.

Another way we can practice collaborative resource development is by distributing resources toward a shared project. We worked with more than 50 small to midsize organizations for six years to organize the two US Social Forums—the second was in Detroit in 2010. The US Social Forum is a massive convergence of progressive forces, and in the first two held in the US, we converged in cities that have been devastated by a parasitic economic model. Organizing for the Social Forums in this country has challenged all of the organizations involved to rise to a new occasion. We have increased our capacity to manage millions of dollars, distribute it across multiple planning bodies, and staff the work. We made many mistakes along the way, and mistakes are truly the best education.

Many of our organizations committed to the process of the US Social Forum are in good positions to act more strategically based on our experiences and the incredible opportunities that this moment presents. How do we operationalize our lessons about scale, resources, and movement building?

Defining power as the development of singular institutions only replicates oppression. But if we define one component of power as the strategic convergence of social forces intrinsically linked to one another and capable of applying new models of



resource distribution and control, then we begin to invest in each other—not just as a form of political solidarity but as an active investment in our collective purpose.

And by investment, I mean time, energy, and good old-fashioned cash money.

### Our Survival Is Tied to Yours

This economic moment is difficult for all social justice organizations. For Black, women-led organizations fighting poverty in Georgia, the moment is downright rough. One of Project South's closest partners, the Georgia Citizens' Coalition on Hunger, is going through a leadership transition as their founder and executive director of 30 years, Sandra Robertson, is succeeded by long-time staff member Carolyn Pittman.

When the Hunger Coalition faced a budget shortfall, Project South listened to the leadership within both organizations and made a critical decision to invest a significant amount of our budget and staff resources to make sure that the transition would be successful. We made this investment as an act of solidarity and with a commitment to our collective purpose. The survival of long-term Black leadership in the South is essential for liberation movements, and the need for the particular contributions of the Hunger Coalition and its legacy is urgent. We invested in local leadership. We invested in an organization transforming the realities of poor and working people. And we invested in a long-term vision of land and food sovereignty, community-based economies, and leadership development of those most affected and displaced by current conditions.

One organization cannot move on every front that demands attention. Our collaborations allow more coordinated advances. Investing in Carolyn's leadership as the executive director and in the work of the Hunger Coalition is an act that advances Project South's purpose.

In collaboration with both organizations' staff leadership and board members, Project South initiated a rigorous plan to build the Hunger Coalition's capacity to launch new economic justice work within rural and urban spaces in Georgia, including the daily operations of the Hunger Hotline, the Umoja Community Garden, and the Georgia Human Rights Union. Through this year-long intensive partnership and transition process, Project South will become co-stewards of the building and the land that we share, while the Hunger Coalition remains independent and autonomous.

As two autonomous organizations, the leadership meets weekly, and Project South contributes toward the expenses of our shared building. We are connecting our youth leaders to the Hunger Coalition programs and their membership to our

efforts. We are planning joint fundraisers and supporting each other to expand strategically. This unique transition partnership puts all of our lessons into action.

### Partnerships for Community Power

Our partnerships go beyond the Hunger Coalition. Southern leaders have built long-term relationships over the last seven years through trials like the Gulf Coast Crisis, convergences such as the Southeast Social Forum, and leadership development vehicles, including Project South's Building a Movement (BAM) weekend trainings and year-long institutes. We have come together to share our visions for building a movement infrastructure strong and flexible enough to respond to the best opportunities and the worst disasters.

An alliance of eight Southern organizations is collaborating to develop common political, economic, and social analysis so that we can create collective plans of action for building power bases across the South. Mobilizing our bases to develop collective agendas requires sustainable infrastructure to carry out the plans effectively. We will have to share and draw from each other's strengths to accomplish our ambitious goals.

Our coordinated actions will achieve our shared purposes: to dismantle the systems that create and maintain racism, oppression, and exploitation while also building the social and economic democracy that advances self-determination and sovereignty on multiple fronts. We cannot merely build our organizations to sustain themselves as separate entities. We cannot achieve our vision alone.

Collaboration is not just an exercise, and joint resource development is not just a good way to diversify our fundraising strategies. By collaborating around resources, we establish new practices based in community principles. Those practices get us closer to the world we are fighting for—a world where we look out for each other's dignity and do what we can to ensure collective success. We are exponentially more effective when we understand our success to be intrinsically linked. That understanding is not free—it comes with a cost. But it's worth that cost, and we encourage our partners and colleagues who are building social justice across the country to find ways to collaborate and to practice new levels of active solidarity. ■

---

Stephanie Guilloud is a co-director on the Executive Leadership Team at Project South, with Emery Wright. Stephanie has helped lead the planning efforts and financial coordination of the US Social Forum as well as Project South's organizing and leadership development work across the region. Project South raises close to half of its annual budget through grassroots fundraising efforts. Learn more at [projectsouth.org](http://projectsouth.org).

# How We Raise \$500,000 Without a Development Director

By Yael Falicov

**WHEN I HEARD THAT THE THEME** for this issue would be “Working Smarter, Not Harder” my ears perked up. As the mom of an adorable four-year-old and someone who manages a chronic health condition, I am careful not to let my work take over my life. I stayed at my last job for almost eight years, and I intend to stay at this one for a good long while—and at only 80 percent time.

I don't believe that martyrdom is an effective leadership strategy. That means I set limits. I take breaks. And I don't work nights or weekends unless I am on a work trip. That means I have to be realistic. I have to live with the fact that I will not get it all done. And I have to be creative about how to delegate without overburdening other staff. I try to set up a clear expectation that they get to go home at 5:30, too.

But in a small organization I can't farm the fundraising out to a development team. We have no development team. We are just a staff of five, mostly part-timers, with a relatively small core of geographically spread donors and volunteers—not a broad membership base like many grassroots organizations have. How do we do it?

## The Basics

Our organization, EcoViva, works in partnership and solidarity with low-income communities in Central America organized to achieve environmental sustainability, economic self-sufficiency, social justice, and peace. Our main focus area is the Lower Lempa region of El Salvador, where we provide funding, technical assistance, and alliance-building support to a social movement made up of about 100 rural communities working to protect the Bay of Jiquilisco Biosphere Reserve and create a vibrant green economy. We also provide limited funding to similar community organizations in Honduras and Panama.

Our budget is just over \$500,000 per year. Half of our income is from major donors, if you include the 50 percent or so of our foundation grants that come through trustees of family foundations that do not require any official proposals. About one-third of our income is from institutional foundations (the kind that require proposals and reports), and the rest comes from earned income and grassroots donations.



Youth involved with EcoViva's partner organization in El Salvador, The Mangrove Association, use visual arts and theater as community organizing tools.

In 2010 our funds came from 12 institutions (10 foundations and 2 businesses) and 130 individuals (117 of whom gave less than \$1,000). We submit approximately 20 letters of inquiry and proposals to prospective and current foundations per year, while we work to support and cultivate about 22 major donors (\$1,000 and up) and 24 monthly donors from within our donor ranks.

## We Are All Fundraisers

Without a dedicated fundraiser, we all take on fundraising roles. Generally, the programs director is our foundations person, the communications manager builds our grassroots donor base, and as executive director I'm our go-to gal for major donors in addition to coordinating the whole shebang. But every single person involved with the organization contributes to getting our donors excited about our work and keeping them engaged, not just as donors but as allies and friends. And that engagement is key to our strength.

We realize that donor engagement is much more than just the ask. Our donors are in many cases also our allies, advisors, task force members, and event organizers. If I try to calculate how much time our staff spend on fundraising, I can't discount all of the ways we communicate and relate to donors and potential donors that builds their relationship with us—tabling at events, sending out newsletters, organizing board committees, making personal phone calls, writing mid-year reports, sending emails. I estimate that we each spend about 60 to 70 percent of our time engaging donors in some aspect of our work, sometimes just as donors but often also as allies whose engagement is greater than the money they give. And I feel that the more engaged they become, the stronger we will be.

The following list of the fundraising-related responsibilities of each person on the EcoViva team gives more detail on how we share the fundraising work. By integrating fundraising into our other organizational jobs, we use our fundraising to engage our donors in our work and build a stronger base to support our mission. I hope seeing how we share the fundraising function will help you think creatively about how your own team can work collectively to engage your donors and expand your base. If we can do it, so can you!



## Fundraising-Related Responsibilities of the EcoViva Team

### Executive Director (ED) – 80% FTE

- Determine funding targets and create fundraising plan
- Maintain personal contact with major donors (give \$1,000 or more annually) and loyal donors (have given at least \$100 per year for at least three years or give monthly)
- Maintain personal contact with foundation trustees and staff
- Conceptualize and review communications materials and appeals
- Brainstorm strategy for each foundation approach
- Call/email foundation prospects (using language crafted by PPD)
- Write 25% of foundation proposals and letters of intent (LOIs)
- Edit other foundation proposals as needed
- Review and edit foundation reports
- Draft print appeals and thank you letters
- Write personal notes on all thank you letters
- Attend funding conferences
- Support board fundraising
- Follow up with tour participants to cement involvement in fundraising
- Type up relevant contact notes in Excel for entry into database

### Programs and Policy Director (PPD) – Full time

- Identify funding needs on the ground
- Coordinate foundation prospect research, with help from interns
- Coordinate shared foundation calendar and research spreadsheet
- Craft email approaches to prospects (with ED input)
- Draft 75% of LOIs and foundation proposals, using the latest program information
- Write all foundation reports
- Conduct direct foundation approaches where appropriate
- Coordinate with potential partners and academic institutions for joint funding proposals
- Conceptualize and draft new proposals (with ED input)
- Build fundraising capacity of local partners
- Type up relevant contact notes in Excel for entry into database

### Communications Manager (CM) – 20 hrs/wk

- Coordinate house parties and special events nationwide
- Find event sponsors and food donors
- Craft and send all eblasts, e-appeals and related social media posts

- Draft print communications materials and appeals as needed (with ED input)
- Establish and build relationships with online giving portals (GlobalGiving, FirstGiving, etc.)
- Gain entrée into employee giving campaigns (still in conceptual stages)
- Build individual donor prospect list by tabling at local events
- Type up relevant contact notes in Excel for entry into database

### Tours Logistics Coordinator (TLC) – 10 to 15 hrs/wk

- Recruit universities and congregations for Community Empowerment Tours (EcoViva income source)
- Gain fundraising commitments from Community Empowerment Tour participants while in El Salvador, communicate those to ED and CM
- Type up CET participant notes in Excel for entry into database

### Operations Manager (OM) – 15 hrs/wk

- Ensure all donors receive timely thank you letters
- Coordinate and oversee all data entry
- Do data pulls and segmentation as needed for email and print appeals

### Board/Loyal donors

- Host house parties
- Provide prospect names
- Help spread the word about online giving campaigns
- Identify and approach potential event sponsors
- Identify potential Community Empowerment Tour leaders at universities and congregations
- Invite friends on Community Empowerment Tours to get to know our organization

### Interns/Volunteers

- Carry out foundation research
- Help support and clean up data entry
- Help at house parties and special events
- Identify and approach potential event sponsors ■

---

Yael Falicov is the executive director of EcoViva, an organization that supports environmental sustainability, social justice, and peace in Central America.



I quit

# Dear Director

By Stephanie Roth

**AS A FUNDRAISING CONSULTANT**, I often hear from development staff about the challenges of their jobs.

Recently, I've learned of several development staff who are not only leaving their jobs but changing careers altogether. One is becoming a yoga teacher, another is going to law school, and still another is studying to be a psychotherapist. Although changing jobs, and even careers, is not that unusual, the turnover rate in development is higher than in most other nonprofit jobs. This fact speaks to important underlying issues that the nonprofit sector needs to address if we want to have vibrant and well-funded organizations.

Although I do not hold executive directors responsible for all of the challenges addressed in this article, I have written it as a letter from a departing development director to his/her executive director to express what many development directors are reluctant to say.

Dear Director,

As you know, I'm leaving my position as development director of Our Good Organization to pursue a new, exciting career as an urban farmer. I hope you won't mind my taking this opportunity to give some blunt but honest feedback on the challenges I faced and that so many development staff experience in their work.

Please know that I understand how hard a job you have. The vision, leadership, and 24/7 commitment you bring to this work is inspiring and has made a huge difference to our community. However, some of the problems we've faced in trying to meet our budget could be better addressed, I believe, by a different approach to the organization's development function.

In your effort to make your job more manageable, I imagine you have wished that fundraising didn't take up so much of your time—or even that some rich person or foundation would just give the organization enough money that we wouldn't have to fundraise any more. I've had those fantasies, too!

Or maybe you realize we really are better off building a broad base of individual donors but think that if only the development staff would do it all, your time could be devoted elsewhere. Alas, what's really needed is a rethinking of some of these assumptions and new ways to tackle our fundraising challenges.

Here are my top suggestions for how you can build a happier and healthier development department, and a healthier organization as well.

**Involve everyone in fundraising.** A key to successful fundraising is recognizing that development staff are not solely responsible for meeting the organization's income projections. We're a critical part of the team and we should play a leadership role, but everyone—from the executive director to the board and non-development staff people—should be involved in some way in fundraising. Everyone should consider how their jobs intersect with development goals and how they can help generate income for the organization.

It will take your leadership to make this "whole organization" approach to fundraising happen. Your support of the development staff when they present ideas for the year's fundraising plan to the board, or try to get board members to sign up for the major gift campaign, or make thank you calls to recent donors, is key to conveying the importance of fundraising to the board. When you don't speak up to champion these efforts, you send the message that participation is optional, and maybe even not all that important.

Similarly, when agendas for staff meetings are so packed that there isn't enough time to discuss fundraising goals and strate-



gies in depth, the development staff role becomes one of nagging other staff members about their participation rather than offering an opportunity for us all to question, explore and share ideas. The result is, as you've seen, an underperforming campaign, event or appeal.

**Model fundraising excellence.** Your leadership is also essential in modeling engagement in fundraising. When you're reluctant to ask individual prospects for money or to meet with some of our major donors, the rest of the staff and board take notice. If you won't do it, they're certainly not going to. Moreover, many donors will be less likely to give a large gift if they don't have an opportunity to meet at some point with the executive director.

**Development staff need to be included in other aspects of the organization's work.** The director of development should be on the management team. By virtue of our relationships with donors, volunteers, and allies, development staff may offer a different perspective on program direction and strategy. Beyond our skills in developing and implementing fundraising programs, development staff believe in the mission of the organization and have ideas about how it can be carrying out its work.

When I first came on staff, you said that it wasn't a good use of my time to be part of discussions and planning around program work, that since my plate was so full, why would I look for more work to do? But I've come to realize that this approach is short-sighted. It leaves development directors with enormous responsibility (to bring in funds) but very little authority (over decisions related to what funds are being raised for)—a stressful work situation that is probably the biggest reason for the high turnover rate in development. Keeping good staff for five years or more will make an enormous difference in your ability to build a strong and effective fundraising program.

**Give the development director time to come up to speed on the job.** It takes a while for a new staff person, especially in a complex position that requires strong relationships with many different constituencies, to be fully up to speed on their job. It's not possible to build a strong team, identify new sources of funds, and generate new income within a few months of starting the job. Realistically, you should assume that it will take at least six months for the investment in this position to result in new monies, and that for larger gifts and foundation grants it can take closer to a full year. If there are significant problems with the organization's infrastructure and systems, it can take months just to resolve those and be able to develop successful campaigns.

Think about all of the knowledge that is required to carry out one individual donor campaign (e.g., our annual year-end appeal to current donors). In order to successfully implement this year-end fund drive, development directors need to know who the donors and prospects are, what the case for support is, that is, what the content of the request for money will be, who are the best people (board, staff and other volunteers) to recruit to the solicitor team, which members of the fundraising team are the best ones to cultivate and/or solicit which prospects, and that's all before they even begin designing and producing the letter, making sure the database can produce the reports they need on donors' giving histories, relationships to the organization, etc. And the first time the development director leads this effort, you'll need to be closely involved, meaning you won't actually be able to be as relieved of fundraising responsibilities as you'd hoped, though it should be a lot easier not having to do it all.

**Having a good development person will not solve all problems.** Most problems in an organization show up in funding (or its lack), and it is easy to blame everything on poor fundraising. But I noticed that our organization grew very fast and began to suffer from mission drift—going in new directions because money was available. Consequently, the community doesn't really know us, and responses to our fundraising efforts are lower than if we had planned our growth more carefully and with greater attention to what our community really wants and needs. Too often, executive directors think fundraising is the problem and better "messaging" is the answer.

Thank you for taking the time to read this letter. I honestly feel that changes to even a few of the issues I raise here will help the next development director not only enjoy a positive, productive and fruitful partnership with you, but will likely play a key role in building a better and more financially secure fundraising future for the organization. ■

---

Stephanie Roth is a consultant with Klein and Roth Consulting. She is the former editor of the *Grassroots Fundraising Journal*, and co-author of *The Accidental Fundraiser: A Step-by-Step Guide to Raising Money for Your Cause*.





# Ten Creative Ways to Pay for Training and Consulting

By Andy Robinson

**MANY GRASSROOTS LEADERS** and their organizations could benefit from occasional infusions of outside expertise, energy, or motivation—the buzz words for this work include “capacity building” and “technical assistance”—yet they often struggle to pay the regular bills. If you’re a grassroots leader, how can you find the resources to pay for the training, coaching, facilitation, or consulting services you need?

Here are ten ideas for financing your capacity-building costs. Everything on the list is based on the real-life experience of clients, friends, and colleagues.

- 1. Honor local expertise.** Mark Twain once joked that “An expert is anyone who comes from more than sixty miles away.” Don’t assume that all the smart people live somewhere else. Your friends, neighbors, and movement coworkers have a variety of skills that can benefit your organization. Most of these people don’t think of themselves as capacity builders, but they may be able to offer exactly what your organization needs—and at a lower cost than that person “from away.” Consider trading services: “How about if I help your board with fundraising? Maybe you could teach mine how to review financial statements.” You can also look for local consultants with appropriate expertise but without the travel costs of an out-of-town professional.
- 2. Ask for free or discounted services.** Given the choice, many volunteers would prefer to contribute a specific, time-limited service—editing your fundraising appeal, critiquing your website, offering retirement planning advice to the staff—rather than commit to an ongoing

obligation (like serving on your board). The more specific and time-limited your request, the better your odds of finding a willing and capable volunteer.

For example, my spouse Jan and I were recruited to facilitate a workshop for local hospice volunteers. If we had been asked to design the entire training series, it never would have happened. But a one-hour workshop? Sure, we can do that.

- 3. Ask professionals to make a voluntary donation after their work is completed and they’ve learned more about your cause.** This strategy can bring you a new donor while reducing the net cost of the services provided, since some of the fee you pay comes back to you in the form of a contribution. Clients request this from me every now and then, and I am frankly surprised it doesn’t happen more often.
- 4. Don’t be afraid to barter.** Over the years, I have donated or discounted services in exchange for food, artwork, accommodations, airline tickets, a variety of services, or the opportunity to learn from somebody else. What does your organization have, know, or do that someone might want to trade for?
- 5. Ask friends and family to sponsor your attendance at a conference or workshop.** This method works in the same way as requesting donations to participate in a walk-a-thon or other pledge event. A young friend in Tucson attends a youth leadership conference each year, covering her travel expenses by sending fundraising letters to her parents’ friends. These letters are always



personal, engaging, and irresistible. She also does a great job thanking her donors and letting them know what she gained from attending the conference.

6. **Ask your board to pay for their own education.** For example, you could ask each board member to pay his or her share of the cost of a facilitated board retreat. The beauty of this approach is that it also increases board buy-in. If trustees invest in their own education and development, they are more likely to engage, participate, and follow through.
7. **Collaborate with other nonprofits to split the costs of shared work.** Board development training offers a great opportunity to pair up with other groups to split the costs. I've done this a number of times, most recently on a trip to Michigan organized by the NorthSky Nonprofit Network. We offered a shared board fundraising workshop for three organizations, followed by individual consulting with each group. Total cost per organization, including fees and travel, was less than \$700—far less than they would have paid had they not joined together.
8. **Host a community workshop and charge fees to cover the costs.** In Spokane, more than one hundred people from dozens of organizations attended a board fundraising training sponsored by the Peace and Justice Action League, which charged \$35 per person or \$100 for up to four people from the same nonprofit. Workshop tuition covered all the costs, including the trainer's fee. The event netted enough money to allow the trainer to stay for a second day to work with the PJALS board, staff, and fundraising committee. By organizing this workshop, PJALS received the professional support they wanted, strengthened relationships with partner organizations, and made a little money. (For the record, they also devoted a lot of time and energy to produce the community event.)
9. **Seek business sponsorships for public programs.** The MetroWest Nonprofit Network, which is based near Boston, recently organized a board training series. The same workshop was presented on five evenings in five different communities. The Middlesex Savings Bank donated \$13,400 to sponsor these events, which enabled the bank to reach an important audience of community leaders. Bank sponsorship also allowed the presenters to offer the workshops for a flat fee of \$50 per nonprofit, with a maximum of six people per organization. After all the bills were paid—conference room rental, catering, supplies, promotion, trainer fees, travel, staff support, and so on—MetroWest Nonprofit Network netted

about \$2,000 on the series while serving more than 300 participants from 65 local organizations.

10. **Build these costs into your budget.** Does your organization have the tools, training, and skills you need to create meaningful social change? The idea of setting aside money to pay for tools and training may not qualify as creative, yet few organizations budget funds for staff and board education and for leadership development. “Capacity building” means learning how to increase your impact by delivering your mission more effectively. If doing your work more effectively is a priority for your organization—and I hope it is—that priority must be reflected in your budget.

If you're trying to stretch that budget, the suggestions outlined above should help. ■

Andy Robinson ([andyrobinsononline.com](http://andyrobinsononline.com)) is a long-time contributor to the *Journal*. In October, he will be leading “Nonprofit Leadership Skills for Social Change” at the Hollyhock Centre in British Columbia ([hollyhock.ca](http://hollyhock.ca)).



Manage all of your relationships using the Databank, an all-in-one CRM package.

FUNDRAISING | EMAIL | ACTION ALERTS | MOBILE

Looking for software that fits  
your ideals *and* your budget?

Look no further than thedatabank.  
During July and August you can save hundreds of dollars  
with our **Summer Service Specials**.



Great Software. Great Service. Great Value.

[www.thedatabank.com](http://www.thedatabank.com) | 1-877-603-0296

# Making Your Case

## Writing from the Donor's Perspective

By Dalya Massachi

**THE BIG QUESTION ON THE MIND** of every reader of your organization's materials is this: "What's in it for me?" As far as your readers are concerned, it's all about the benefits you can offer them: how your organization's work improves the lives of your constituents and their communities. In this article, I focus on how your organization's written materials can answer this question.

If we look at it from our readers' perspective, we will notice that they are less interested in all of the wonderful features of what we do—which we often focus on—and most interested in supporting benefits that address their specific needs and values.

For this reason, writing about benefits that matter to your readers is absolutely crucial. Ask yourself: How will your work improve the lives of your readers and their communities, in the short and the long term?

Notice that I said both your readers *and* their communities? Our stakeholders want to find ways to benefit both themselves and the people they most care about. As we shift from the "me generation" to the "we generation," we'll want to edit their big question to read instead: "What's in it for me *and us*?"

### The Feel-Good Imperative

Simply put, your job is to refine your content so that it makes your readers feel good about the benefits you are offering. In fact, you want them to feel so good that they are willing to take a chance on you with their time, money, energy, or other resources.

Your writing has to persuade them that your work will help them achieve their goals. Eventually, you will compile especially effective phrases, paragraphs, and statements to use in your materials. But you will have to regularly tweak and update everything to make sure it uses language that speaks most persuasively to your specific intended audience.

### From Features to Benefits

Consider the features of your work: your programs or campaigns. That is, how you would answer the question, "What do you do?" The details often include answers to questions your most interested readers might ask, such as technical information on the nitty-gritty of how you carry out your programs.

Benefits, on the other hand, are both tangible and intangible outcomes you are striving for: the great results and powerful impact that your stakeholders will experience from

supporting you.

Here are three related questions that can help you identify the benefits of your work:

1. What does your work mean to your reader and/or community—personally, financially, physically, spiritually, and/or emotionally?
2. What will happen as a result of the particular features you offer, and how does that satisfy the needs and desires of your readers?
3. For each feature you offer, what is the answer to the question, "So what?"—that is, how does that lead to something better for my reader and/or the community?

Because you work on your issue every day, you are very familiar with the answers to these questions. In fact, you may even take them for granted and assume that your readers can also rattle off the answers. But your readers are not as intimately involved as you are and they have many other things on their minds. They need regular reminders about the importance of your work. Assuming that they remember everything can be harmful to your organization's health!

### Begin with Your Mission Statement

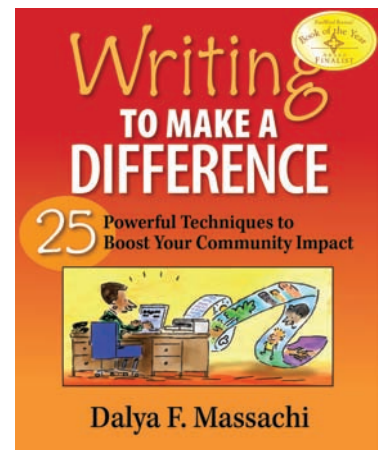
Your mission statement—something you've already crafted and have at hand—will serve as the seed that will grow into a mature tree of benefits. It will point you toward uncovering the many benefits you offer your constituents, funders, and other stakeholders.

Here are two examples:

The mission statement of Slow Food USA:

Slow Food USA seeks to create dramatic and lasting change in the food system. We reconnect Americans with the people, traditions, plants, animals, fertile soils and waters that produce our food. We seek to inspire a transformation in food policy, production practices and market forces so that they ensure equity, sustainability and pleasure in the food we eat. ([slowfoodusa.org](http://slowfoodusa.org))

The first part tells us what they are doing: creating change in the food system, reconnecting Americans with where their food comes from, and inspiring transformation in how food is created and sold.





The last phrase begins to answer the question, “So what? How does that make a difference?” The answer is that food production practices and market forces will begin to ensure “equity, sustainability and pleasure in the food we eat.”

The mission statement of the Environmental Support Center in Washington, D.C.:

[We] promote the quality of the natural environment, human health, community sustainability and social justice by building the capacity of environmental justice groups and their allies.

And what is the result?

...all communities in the country are free from environmental hazards, enjoy a healthy natural environment, and offer employment through ventures that are environmentally and socially sustainable. (envsc.org)

### List and Organize All the Benefits You Offer

You probably have noticed that most people who get involved with social justice or organizing groups like yours are looking not only for practical benefits but also for psychological and emotional benefits they can gain.

This fact defines community-benefit organizations, and you should take it seriously. It can help position your work in the forefront of your readers’ minds. Here are a few sample types of benefits, both practical and psychological-emotional, that your organization may offer. See how you can adapt them to fit your specific organizational context. And add to these lists the many other benefits your particular organization offers.

If your written pieces acknowledge and support these

emotional needs in your readers as well as the practical needs you meet, you will be on your way to instilling a sense that your organization plays an important part in their lives. You can do that by naming significant benefits whenever they come up, or at least implying their presence.

Here are some examples:

A wealthy donor is interested in contributing financially on a global level, but is unclear about how to go about it. Let’s say that your organization is involved in international social justice work focusing on women and girls, and you want to reach out to this reader. How would you do it?

In your introductory letter to this prospect, you would touch on the practical and psychological-emotional benefits that the donor would receive from investing in you and your partners overseas. Depending on what you know about the person, you may mention things like these:

- Your organization can offer the donor the opportunity to make a difference in the lives of women and girls around the world by partnering with the experts on your team
- Your organization has a great track record of success stories
- The donor’s generosity is a way for him or her to give something back and empower others by helping prepare them to join the global community
- By joining your circle of donors, the donor will be able to meet regularly with others who share his or her commitment
- Your organization is a registered nonprofit, and all gifts without an exchange of goods or services are tax-deductible.

PRACTICAL BENEFITS	PSYCHOLOGICAL-EMOTIONAL BENEFITS
<ul style="list-style-type: none"> <li>• A convenient opportunity, despite their hectic lives, to make a difference in their community and serve as a community resource — to give something back in a way that matters to them</li> <li>• Access to unique expertise that addresses a key problem in a socially responsible manner</li> <li>• Interactions with other people with whom they share values, beliefs, concerns, and struggles</li> <li>• New skills and/or understanding</li> <li>• A healthier, brighter future for themselves and those they care about</li> </ul>	<ul style="list-style-type: none"> <li>• A real sense that they are part of a winning team that is making the world a better place</li> <li>• Feelings of being kind, generous, trustworthy, helpful, important, conscious citizens</li> <li>• Improved morale, excitement, or inspiration about changes that are possible/probable</li> <li>• The knowledge that they are contributing to solve an important problem that directly or indirectly affects them</li> <li>• The knowledge that they are empowering themselves and others to make their own decisions</li> </ul>

How can you find out more about your constituents' motivations for getting involved with your organization and the benefits they seek?

A few ways to gather this information include conducting focus groups, administering online or offline surveys, and simply observing your constituents in action. Keep in mind that you may discover benefits of your work that you have been overlooking. For instance, constituents may be using your work in ways that you have been unaware of—such as sharing the information they learn with their child's class, or starting a neighborhood group based on your work, or even using your video clips in their own creations. You can then integrate your new knowledge into your growing reader databank.

### Consider Benefits You Offer to Other Organizations, Too

Not all your readers will come to your work as individuals. Some of them will represent other organizations, with slightly different concerns in mind. What benefits would these readers need to be aware of to make a case for engaging with you? And what would hold them back?

Here are some examples:

Let's say that your reader works at a funding institution or an organization that works in a field closely related to yours. Then she stumbles upon your document and looks for ways your work benefits her and her organization, such as these:

- Fits with her overall mission and strategic direction
- Will work in conjunction with other things she already has or does
- Will help her fulfill her responsibilities to her community
- Will help her address an emerging issue more comprehensively than she was able to in the past

### Writing Workout

The following exercise will help you identify key benefits of your organization that you will want to mention in many types of fundraising and outreach materials.

**STEP 1:** Draw a vertical line down the center of a piece of paper. On the left-hand side, write three features of an important program or campaign you operate, leaving a few blank lines between them.

**STEP 2:** On the right-hand side, write down at least two benefits to your readers, the community, and/or the environment that go along with each feature. That is, consider your readers' point of view and see what difference those features will make in their lives—as if they were asking you: "So what?"

**STEP 3:** Now dig a bit deeper and think about why each benefit is so important to your readers (the next level of "So what?" questions). Does the benefit touch on a core value, belief, need, or desire? What greater things will be possible for them in the future as a result of your work? Jot down these second-order benefits as well.

**STEP 4:** For best results, now ask a couple of people outside of your organization to help you out. Ask if they feel that you have answered all of the "So what?" questions to their satisfaction. If not, go back and see if you can improve your answers.

By focusing on your work's benefits—and not just its features—you will begin to develop language that you can use (and reuse) in many of the pieces you write. And you will begin to engage your readers on a deeper, more meaningful level than ever before. ■

---

This article is adapted from Dalya F. Massachi's award-winning new book, *Writing to Make a Difference: 25 Powerful Techniques to Boost Your Community Impact*. To learn more about how you can engage more readers and turbocharge your fundraising and outreach, visit [dfmassachi.net/wmd.html](http://dfmassachi.net/wmd.html).

**The All-in-One Fundraising Solution**  
— For Less! —

- Manage Constituent Contacts & Donor Development
- Collect Donations & Information Online
- Handle All Types of Fundraising Activities
- Report and Analyze Your Results
- Track, Process & Recognize Donations
- Create Personalized Donor Web Pages

**Donor Perfect**  
Fundraising Software

Both Installed & Online Versions Available

To learn more, visit [donorperfect.com/Grassroots](http://donorperfect.com/Grassroots) or call 800-220-8111



## Bringing Money to Light

Beth G. Raps, Ph.D.  
Berkeley Springs, WV

PHONE: (304) 258-2533  
bethraps@earthlink.net

[WWW.BRINGINGMONEYTOLIGHT.COM](http://WWW.BRINGINGMONEYTOLIGHT.COM)

Always a free initial needs assessment consultation.

*Working with and on behalf of those who seek to create a Just & Compassionate Society*

## EARP EVENTS & FUNDRAISING

EVENT PRODUCTION & PROMOTION  
*Galas • Conferences • Golf Tournaments • Festivals • Auctions*

MAJOR DONOR DEVELOPMENT & OUTREACH • BOARD TRAINING  
HIGH IMPACT EVENTS & CAMPAIGNS

t 510-839-3100 e laurie@earpevents.com url: www.earpevents.com



### READY FOR A NEW WEBSITE?

Call us — we can help you create a professional, accessible website. We're easy to work with.

**Fast Smart Web Design**  
<http://fastsmartwebdesign.com>  
info@fastsmartwebdesign.com  
(718) 720-1169

*Ahhh, that feels right!*

## FundingChange

training & consulting

*Helping grassroots groups raise more money for social change*

- Individual Donor Fundraising
- Planning & Strategy
- Donor Communications
- Donor Relations
- Workshops & Coaching
- Board Development & Training

Tina Cincotti • [tina@fundingchangeconsulting.com](mailto:tina@fundingchangeconsulting.com)  
[www.fundingchangeconsulting.com](http://www.fundingchangeconsulting.com) • 617.477.4505



## jdcPartnerships

*integrating information for impact*

Partnering with clients to build their adaptive, strategic and leadership capacity.

415.482.7839 *relfax* info@jdcpartnerships.com www.jdcpartnerships.com



## Klein&Roth Consulting

Fundraising training & consulting | Board development | Meeting facilitation  
Check out our books at [www.josseybass.com/go/kimkleinfundraising](http://www.josseybass.com/go/kimkleinfundraising)

KIM KLEIN | STEPHANIE ROTH | NANCY OTTO | RONA FERNANDEZ | STAN YOGI  
info@kleinandroth.com | 510-893-8933 | [www.kleinandroth.com](http://www.kleinandroth.com)

## Leyna Bernstein Consulting

Executive Director/Development Director Search  
510-529-4276 • [www.leynabernstein.com](http://www.leynabernstein.com)

Helping good causes recruit and retain great leaders



## NATALIA LÓPEZ

- Strategic Planning
- Facilitation
- Board Development
- Fundraising Coaching & Training

415.282.6941 • FAX: 415.229.7738 • EMAIL: [lopez186@sbcglobal.net](mailto:lopez186@sbcglobal.net)

## PEGGY MATHEWS

CONSULTANT  
TRAINER • COACH

### FUNDRAISING & ORGANIZATIONAL MANAGEMENT

30 years in fundraising and directing social change organizations of all sizes. 25 years experience in training staff and boards.

FUNDRAISING PLANNING & COACHING • MAJOR GIFTS CAMPAIGNS  
BOARD DEVELOPMENT • STRATEGIC PLANNING • EXECUTIVE COACHING

*Helping you work smarter, not harder*

[pegmathews@earthlink.net](mailto:pegmathews@earthlink.net) • (423) 562-8189



## Morten Group

Mary Morten | President

[marym@mortengroup.com](mailto:marym@mortengroup.com)  
773.343.5111 [mortengroup.com](http://mortengroup.com)

Organizational & Resource Development  
Film & Video Production • Executive Retreats

## Shaun (Sha) Grogan-Brown

540.445.0819 [sgroganb@pointconsortium.org](mailto:sgroganb@pointconsortium.org)

- \* Fundraising Training & Workshops  
*Capacitación y Talleres: Recaudación de Fondos*
- \* Coaching & Planning *Consejería y Planificación*  
**In English**  
**En Español**
- \* Graphic Design *Diseño Gráfico*

[pointconsortium.org](http://pointconsortium.org) \* [infovisions.org/rise](http://infovisions.org/rise)



## Mara Perez, Ph.D.

Development and Planning Services

*Charting a Path to the Future.* Grant and report writing, strategic planning, program development and evaluations, needs assessments, copy editing, and social research.

Serving nonprofit organizations, public and private educational institutions, and charitable foundations. Expertise in youth and children, diversity, immigration, education, leadership development, health/wellness and international affairs.

San Francisco, Bay Area ■ (415) 461-0141 ■ [mperez@svn.net](mailto:mperez@svn.net) ■ [www.svn.net/mperez](http://www.svn.net/mperez)



## Mickey Macintyre

President & CEO

[www.realchangepartners.com](http://www.realchangepartners.com)  
[mickey@realchangepartners.com](mailto:mickey@realchangepartners.com)  
321.297.6796

Celebration, FL • Washington, DC  
Colorado Springs, CO

*practical solutions for today's leaders*



## RETRIEVER

DEVELOPMENT COUNSEL

Capital & Special Campaigns • Legacy Gifts  
Board Development • Vision & Strategic Planning  
[www.RetrieverDevelopment.com](http://www.RetrieverDevelopment.com)

Call to confirm we match what you need - it's FREE:  
503-736-1102

Fundraising • Earned Income • Marketing • Facilitation  
Board Development • Workshops & Coaching

*Specializing in the needs of grassroots organizations like yours*

## Andy Robinson

802/479-7365/[andyfund@earthlink.net](mailto:andyfund@earthlink.net)  
[www.andyrobinsononline.com](http://www.andyrobinsononline.com)



## WindowBox

COACHING & CONSULTING

growing the capacity for change

Offering strategic and creative efforts to build movements for justice through:

- \* fundraising consulting
- \* leadership coaching and staff support
- \* program planning, assessment and facilitation

**Ellen Gurzinsky**  
[www.windowboxconsulting.com](http://www.windowboxconsulting.com)  
646-484-5218 [ellengurz@yahoo.com](mailto:ellengurz@yahoo.com)

# Grassroots Fundraising Journal

A Publication of GIFT

1904 Franklin Street  
Suite 705  
Oakland, CA 94612

ADDRESS SERVICE REQUESTED



## Donor Management

Nothing to install & nothing to maintain  
Focus on raising more money

# ePhilanthrAppeal



by FundTrack Software®

866-487-8444  
fundtracksoftware.com

