Grassroots Fundraising Journal

VOLUME 30 NUMBER 5 • SEPTEMBER–OCTOBER 2011

A PUBLICATION OF
GIFT
Grassroots Institute for Fundraising Training

Celebrating

YEARS

We are celebrating the Grassroots Fundraising Journal's 30th anniversary! Providing practical and relevant fundraising information is the core of what we do (and why readers like you have kept us in print for the past 3 decades), but how we do it and for whom are just as important to us. Here's a quick peek into what makes us tick:

This is our 179th issue!
We have never missed printing an issue.

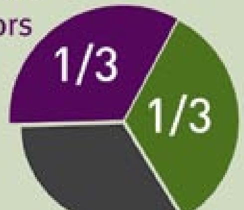
We have published 279 different authors.

We have featured over

100 organizations from 29 states

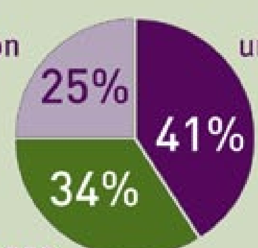
plus used countless others as inspiration and examples.

We have subscribers in all 50 states, plus 10 other countries.



1/3 of our subscribers focus on advocacy, closely followed by community organizing, then social services.

Subscriber organizational budgets



It takes the equivalent of 1.5 staff members to produce the *Journal* and get it into your hands. As many as 10 people might work on just one issue.

The *Journal* is printed by Inkworks Press, a certified green business that's a union shop and runs as a worker collective.

We print on elemental chlorine free paper made with

55% recycled fiber

30% post-consumer waste using vegetable oil based inks

saving approximately:

43 tons of paper

300 fully grown trees

133,290 gallons of water

90 Million BTUs of energy

8,100 pounds of solid waste, and

27,660 pounds of greenhouse gases over 30 years.

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30 years of the *Journal*

Charles Ryan Long

2011 HAS ALREADY BEEN A BANNER YEAR for the *Journal* and for GIFT as a whole. We are celebrating this 30th Anniversary issue of the *Journal*, the 15th Anniversary of GIFT, and the 5th anniversary of the two organizations merging. As if that weren't enough for one year, GIFT recently hired me as the executive director, entrusted to lead it into the future.

It's humbling for me to look back on the *Journal's* 30 years and to realize what wonderful resources have been generated by the folks involved over that time. Having been the sole full-time fundraiser at a small social justice organization, I can speak personally to the tremendous impact the *Journal* had on me. As a subscriber I felt in dialogue with leading thinkers and organizations fundraising for social justice. By reading the *Journal*, I built a repertoire of how-to's on topics ranging from planning special events to creating a fundraising board. As I begin my work with GIFT and the *Journal* now, it gives me tremendous pride to look back over my professional history and know what an invaluable resource we are providing.

Like many of you, there was a lot I didn't know about the inner workings of the *Journal*. So as a special birthday treat, in this issue we have a fun info-graphic that shares a little more about how we work, you (our subscribers), and the context we are working in. Next, *Journal* founder Kim Klein shares what hasn't changed in grassroots fundraising over the past 30 years: the importance of cultivating relationships. Then we hear about Oregon's Farmworker Union, Pineros y Campesinos Unidos del Noroeste, and what they've learned over the past 25 years raising money from their membership.

Cause Effective, a group that has also spent three decades helping nonprofits raise funds, shares some insights on how to deal with the shrinking amount of volunteer time available to board members and other volunteers. Finally, following up on Kim's advice about relationship building, Maria Perez gives us some useful tools for communicating better with our donors, particularly through appeal letters.

As a display of the tremendous generosity of our readership, donors and allies, this issue also includes messages, ads and announcements commemorating this special 30th Anniversary Issue. As you will see, many of the messages are thanks to our outgoing Executive Director, Priscilla Hung. So much of the joy and excitement I have about the next decade of our work can be attributed to the foundation that Priscilla has built. Her leadership and thoughtful infrastructure development give me confidence in envisioning a strong future for GIFT and the *Journal*.

So, an extra special shout out to Priscilla and a huge Nice to Meet You All of You, our subscribers. Let's be in dialogue moving forward as we work to build a world we all want to see.

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The National Conference
on LGBT Equality
Creating Change
Congratulations on 30 years
of fundraising fun!
Creating Change is the largest annual gathering
of activists, organizers and leaders
in the LGBT movement.
ACTION
is HOT
SAVE THE DATE: January 25–29, 2012
Baltimore, Maryland • Hilton Baltimore
Visit www.CreatingChange.org for more info.
Power
is sexy
National Gay and Lesbian
Task Force

Back to Basics

How to Build Relationships that Last

Kim Klein

IN MY 25TH ANNIVERSARY ARTICLE for the *Journal*, "A Life in Fundraising," I commented that when Lisa Honig and I founded the *Journal* we never imagined it lasting 25 years. Since then, as the *Journal* continues, I have been neither publisher nor editor, but I am a happy subscriber.

Much has changed in the nonprofit world through these years, but there is one element of fundraising that has not changed, and that is the need to see fundraising as essentially a process of building relationships. Perhaps the most useful thing I can contribute to this anniversary issue is to remind us all of what that means.

The notion that the purpose of fundraising is not to raise money but to build relationships continues to get lost in the sheer overwhelm fundraisers face in doing their daily jobs. Ironically, were this principle to be put into practice more conscientiously, fundraisers' jobs would become easier.

The principle is this: "Don't seek a donation, seek a donor. Don't look for a gift, develop a giver."

A good illustration of what it means to develop a giver comes from a story adapted here from my book, *Fundraising for Social Change* (6th edition).

GINA GENEROUS COMES HOME FROM WORK, feeds her cats, kicks off her shoes, and sits down to glance through what little snail mail she still gets. Most she considers "junk" and throws away, but one piece of direct mail catches her eye. It's from a program that helps lower-income women find work. Gina is attracted to their mission statement: "We believe in the power of women to change each woman and the potential of each woman to give all women power." Because Gina generally supports women's causes, she opens the letter, reads it quickly, and decides to send a small gift. As she waits for her dinner to cook, she writes out a check for $35 and puts it in the return envelope that came with the appeal.

This impulse gift does not represent Gina's true giving ability nor does it say much about her commitment to or even knowledge of that organization. Now the program must try to get Gina to give again so that she begins to be a regular or "habitual" donor.

In a few days Gina again comes home tired, and again feeds her cats and starts her dinner. In her mail, she finds a short, personal thank-you note from the program. "How nice," she thinks. She again feels good about her gift and the name of the organization is more firmly planted in her mind.

Over the next few months, Gina receives a copy of the program's newsletter. She looks at their website and "likes" them on Facebook. About three months later, Gina receives another letter from the program. This letter thanks her again for her previous gift and asks if she can make a special, extra gift to help buy playground equipment for the children of the women at the program to use while their mothers take classes and get coaching on job skills. Gina is touched by the request and sends $50.

Again, she is personally thanked with a note that specifically says, "Thanks so much for your extra gift of $50." Gina appreciates that the organization notices these extra gifts. Another special request comes three months later, but Gina has had some extra expenses so sends nothing.

Three months after this—now nine months since her first gift—Gina is invited to an open house and tour of the program. There she meets the director and some board members, including some graduates of the program. Everyone who attends is asked to leave a check in a jar by the door if possible. Gina gives another $25.

Over the next two years, this pattern is repeated. Gina comes to a few events. She volunteers with the phone-a-thon in response to an e-mail asking for people who can give an evening during the week. She joins the group's e-mail list for action alerts, and from time to time calls her congressperson or signs a petition to advocate for better services and more funding for work-preparation programs.

By now, Gina has moved from being an impulse donor to being a habitual donor to the organization, giving whenever they ask if she can. She sees herself as a part of this organization. She forwards e-mails from the organization to friends and asks her family to donate to them instead of buying her birthday presents.

Now Gina receives a personal letter signed by a board member asking her to consider becoming a monthly donor by contributing $25 per month. The letter thanks her for her past support, talks again about how important the programs are, and asks her not to make a decision until the board member calls her. Gina now has to think about the organization: How important is it to her? Does she care enough to have $25 charged to her credit card every month? Can she afford it? What will she want to find out from the board member to help make her decision?

Whatever her decision, Gina has moved to the next level, that of a thoughtful donor. She may thoughtfully decide to give $25 a month or to give $100 once by check, or she may continue to give small gifts a few times a year, but she has had to think about her giving. After talking with the board member, she joins the monthly donor program.

THERE IS ONE ELEMENT OF FUNDRAISING THAT HAS NOT CHANGED, AND THAT IS THE NEED TO SEE FUNDRAISING AS ESSENTIALLY A PROCESS OF BUILDING RELATIONSHIPS.

Over the course of about three years, Gina's relationship to the organization has gone from impersonal giving by mail to a little more personal (attending events and volunteering for short-term projects) to very personal (being solicited by a member of the board).

More years pass, during which Gina continues to be a regular donor and occasional volunteer to the organization, and her annual giving increases during that time. Now the group decides to buy a new building that will allow them to save money by bringing all their programs on-site. In addition to state, federal, foundation, and corporate funding, the group must raise $250,000 from individuals. Their capital campaign asks each of their donors for a capital gift in addition to their annual gift. Because she is both a reliable volunteer and a steady major donor, Gina is asked to serve on the capital campaign committee. She now knows several board members and the executive director and development director. Gina agrees to serve and decides to give $15,000 that she inherited unexpectedly from an aunt. She is happy to find a meaningful way to use this money.

After the campaign is completed, Gina is invited onto the board and decides to join it. When the organization institutes a legacy giving program, Gina changes her will so that the program receives a major portion of her estate.

Working with the Right Donors

Most organizations have relationships with some of their donors that are similar to the relationship this organization developed with Gina. These relationships often turn into friendships between the donor and some of the organization's key staff and volunteers, and it is possible that no one even quite remembers how the relationship started or progressed. But an organization needs a program that systematically builds relationships with donors, as the work-preparation program did with Gina.

As your organization recruits more and more donors, it has to figure out which donors might respond the way Gina did and which donors really don't want to do more than send a donation once or twice a year. Here are two examples from my own experience to illustrate why someone may or may not become a thoughtful donor to a particular organization.

I have given to one organization for about five years simply because the development director, who attended one of my trainings, asks me personally for a donation each year. He writes a letter (not an e-mail) and follows up by phone, trying two or three times until he gets me. He is a lovely person and very committed to his cause, and I hope his organization, which does important work well, raises a lot of money. However, theirs is not work that I am particularly drawn to, so in response to his requests to increase my gift, I finally told him, "I admire your persistence and I appreciate the work your group does, but it will never be one of my top ten organizations. The amount I donate now is likely to be the most I will give this group."

On the other hand, I have given money off and on for about 30 years to an organization whose work I really care about. I go to some of their events and I tell friends about them. As the years have passed, I hear less and less from them. During years when they received a lot of foundation funding, I didn't hear from them at all. I would see members of their staff and board at different events, so I felt connected, but they were not always on my list for giving, which I realized was because they hadn't asked. Once I said to the then-new executive director, "I have been giving this organization money for years, yet I never have received a personal letter or any request to give more." In response she said, "Our database is kind of screwed up. I don't know what to do about that." I thought to myself, "How about fixing it? Or getting a new database? Or how about saying, 'I will call you next week to discuss what we are doing and to ask you for a bigger donation once you hear about our new work.' "

Neither of these organizations will get very much more money from me, one because I don't care enough to give more and the other because they don't care enough to ask for more.

Every organization will leave some donors behind and will make mistakes. You will pursue people who respond to your persistence but not your cause; you will leave donors off the list who love what you do and would give you much more money. You will spell names wrong and forget that Mary and John are divorced or Joe has died. But you will do this far less often and with far fewer consequences if you build into your organizational culture the importance of relationships.

Keep the following points in mind:

- Donors have a variety of really good organizations to give their money to. Few donors can give to every excellent organization, so most will choose the ones that pay attention to them. Among the half-dozen or more organizations most givers support, they tend to give most to the ones where they know people and they feel noticed.
- Organizations generally do a good job of getting donors to give for the first time and thanking them, but they often abandon their donors in the search for new donors or when they win foundation funding. In this way, they bring donors in only to drive them right back out again.
- Although an organization may use personalized letters and e-mails to solicit donors, it must remember that *personalized* is not the same as *personal*. Personal means knowing the person in question, not just making them think you have addressed them personally.

Building Relationships as a Cultural Enterprise

Every staff and board member should operate from two principles in developing relationships:

- **Having a lot of donors is more important than having a lot of money.** Having lots of donors can lead to lots of money, but there is even greater value: having lots of donors means having lots of people who can write letters to the legislature, show up at demonstrations, ask other people they know to become donors. Your donors are ambassadors for your organization; the more you have, the more you can mobilize that energy.
- **Donors, being people, respond to genuine interest in who they are.** Keep a list of questions in your mind to ask donors: how they found out about your organization, what other organizations they think do really good work, how long they have lived in the community, where they grew up, and so on. What separates good fundraisers from great ones is curiosity. Good fundraisers want to find out what the donor knows about their organization and fill in the blanks, get more excitement going, and ask for more money. Great fundraisers want to find out more about their donors because they love to know all the kinds of people who are attracted to their organization.

Five Practical Ways To Build Relationships

Building on these two principles, here are five practical things you need to do to honestly say that relationship building is central to your fundraising practice.

1. **Flag those donors who seem most interested in your work.** Pursue those people who give often, who give for years at a time, who write personal notes on Post-its that they attach to their checks, who come to events.

Spend 60 percent of your time with the 10 percent of your donors who are most interested in your work. Most, but not all, of these people will be major donors, but some will also be long-time donors, donors who give frequently, and people who are not giving to their capacity.

2. **Have a team of volunteers to work with donors.** A strong donor program cannot be entirely staff driven. Give your volunteers a portfolio of donors: "These are your twenty people to keep in touch with, invite to events, e-mail with breaking news, and ask for money." One staff person can maintain good relationships with 50 to 75 donors at the most. But one staff person coordinating just five reliable volunteers can build relationships with 200 or more donors. A national organization I talked with recently has 60 volunteers on a Resource Advisory Council. Each volunteer gives their own gift and is responsible to raise $5,000 or more. Each has a portfolio of 5 to 20 donors; among all of them, they keep in personal touch with about 750 donors

TRIBUTE TO NANCY ADESS

MANY OF OUR READERS KNOW OF *JOURNAL* FOUNDER KIM KLEIN and longtime Editor Stephanie Roth. But someone who has been here since the beginning and who has now been involved longer than Kim and Stephanie—and who doesn't often get the recognition she deserves—is Senior Editor Nancy Adess. Given that we've never missed an issue, and neither has she, that means Nancy has edited more than 500 *Journal* articles over 30 years! Nancy also edits all of the books Kim Klein has written as well as other titles in Kim Klein's Fundraising Series.

Nancy keeps the *Journal* clear, accurate, and consistent. She's the one who makes sure readers like you get articles month after month that are interesting and relevant, that clearly spell out the key points, and that don't have wayward spelling, grammar, or punctuation to distract you from the great content.

We owe much of the *Journal's* success and staying power to Nancy. We thought you might like to learn a little more about her, so we asked her a few questions.

GFJ: What's your favorite article the *Journal* has published?

NA: Kim Klein's early article, "Getting Over the Fear of Asking." It touches on the most basic and most important part of grassroots fundraising in a way that really helps people see past their blocks about getting out and asking someone for money. I suggest everyone reread that article once a year to reinspire their asking!

GFJ: What's one interesting or exciting thing you've seen change over the past 30 years in fundraising or nonprofits?

NA: There's more sense of community and movement-building among nonprofits, of organizations seeing themselves as part of a larger movement that, working together, can change the way people think and create a greater sense of justice. That feeling of being part of something larger has resulted in groups finding ways to collaborate more on fundraising, too.

GFJ: What keeps you committed to the *Journal* after all this time?

NA: The *Grassroots Fundraising Journal* is no less an extraordinary resource now than it was when it began 30 years ago. Even though I've been doing this for many years, I still keep in my mind the hundreds of small, grassroots groups fueled by a critical sense of justice and run by people who believe in a better world. I'm delighted to continue to be part of that movement.

Thank you, Nancy!

giving $500 or more. This committee raises more than $100,000 a year. Most of these volunteers were found on the donor database. They were donors who gave $500 or more and were asked to increase their gift and to become involved. They all do something to raise funds for the group.

3. **Be a donor yourself.** Yes, it's a cliché, but this is critical! You and everyone who deals with fundraising needs to know exactly how it feels to decide how much to give to your organization. Watch your mind as you choose between amounts you can really afford. Could you have given $100 but you chose $50 instead? Why? Do you think one of your programs isn't well managed? Or is it that you need to send as much money as you can to your recently unemployed sister who is in danger of losing her home? Donors have the same concerns you do. Being able to say (or just know) that you are asking someone to do something you have already done and felt good about is very different than asking someone to do something you haven't done and won't be doing.
4. **See your donors (and your funders) as human beings.** Far too often I hear condescending remarks about donors from development directors, along the lines of "The donors love that cheesy heartstring stuff." Someone told me recently that a proposal I had written needed more "puppies and kittens about to get gassed" to "really get the funders going." (The work had nothing to do with animals.) It is hard not to get cynical sometimes about donors, but when you feel that some of your donors are too demanding or your funders are "out of it" (a comment I hear often), you need to take a couple of hours off. See a dumb movie. Read a trashy novel. Get a massage. When I feet irritated with donors or funders, I have to remind myself that without these people the organizations I work for would not exist. It's important to get back into feeling good about your organization and all the people who make your work possible.
5. **Remember that people change.** Your organization may be a donor's favorite for a few years, then not. Like friendships, relationships evolve. Someone who was your closest friend in college may be a person you write to once a year now. A donor who loved your organization when it was starting out may feel you have gone too mainstream as you have gotten bigger. On the other hand, someone who questioned whether your organization's could deliver on your program promises when you were small may now be impressed with your growth and want to help more. These changes are why you always need to bring in new donors and you cannot take it personally if a donor stops supporting you (if you have done everything you can to find out why).

The first thing I ever learned about fundraising is that is it is not really that hard. It is hard work, to be sure, but it is not hard to understand. Can you tell the truth? Can you make friends and keep them? Do you care about something? Are you interested in people? Then you can raise more and more money from more and more donors every year. ■

Kim Klein is the founder and publisher emerita of the *Grassroots Fundraising Journal*. Her classic book, *Fundraising for Social Change*, has recently been updated in a sixth edition, available from josseybass.com. Kim can be reached at kleinandrothconsulting.com.

WE LAUNCHED OUR FIRST ISSUE IN 1981. WE'VE SEEN A LOT OF CHANGES OVER THE PAST 30 YEARS:

In 1981, we were in the midst of a recession spurred by U.S. monetary policy and an energy crisis. In 2011, we are slowly coming out of a recession fueled by the subprime mortgage crisis exacerbated by rising oil and food prices.

The amount of money given to charity by private sources was $60 billion in 1981 and $290 billion in 2010. The United States Gross Domestic Product was $3 trillion in 1981 and $14.7 trillion in 2010. Both grew 5 times larger.

Of the money given to charity by private sources, 83% came from individuals in 1981 and 73% came from individuals in 2010.

The fundraiser's job has become increasingly professionalized over the years. In 1981, the Association of Fundraising Professionals boasted 2,500 members and now they have almost 30,000.

1981 was the first year that the word "Internet" was mentioned and MS-DOS was released by Microsoft along with the first IBM PC. In 2011, 90 percent of our subscribers report using Facebook regularly.

PCUN's first board of directors, meeting with César Chávez in Woodburn, Oregon (December, 1985). Photo courtesy PCUN.

Dues Worth Paying

Larry Kleinman

OREGON FARMWORKERS HAVE PAID $2,000,000 to support their organization, Pineros y Campesinos Unidos del Noroeste (PCUN). This September, PCUN completes the first quarter-century of its system of membership dues, a fitting occasion to recount and analyze some of its essential ingredients, as well as experiences, ideas, and lessons that shaped it.

Anatomy of a Hybrid Model

Although PCUN is a union, only a very small percentage of our dues income comes from members working under a collective bargaining agreement. In Oregon, there is not (yet) a legal framework for collective bargaining in agriculture. Since 1988, PCUN has made huge progress in our iconic struggle to institute just such a system on a mass scale. Along the way, a few small growers have stepped forward to voluntarily negotiate and sign collective bargaining agreements recognizing PCUN as their workers' union, affording seniority and grievance rights and better wages and benefits. At these farms, the workers (PCUN members) pay as dues 1.5 percent of their gross wages earned on farms under PCUN contract.

However, 97 percent of PCUN's membership income has come from "associate" members, farmworkers not under PCUN collective bargaining agreements. They live or work in the Mid-Willamette Valley. A major county in the Valley, Marion County generates more than half a billion dollars annually in farm products and is home to 40,000 farmworkers as well as the Oregon state capitol city of Salem, and Woodburn, PCUN's home and Oregon's largest city with a Latino majority.

Here's how PCUN membership fees work. PCUN associate members pay a one-time initiation fee of $15 and quarterly dues of $36 ($21 if the member is a retired or permanently disabled farmworker). Members in good standing are covered under a group insurance policy that pays $5,000 in the event that a member, spouse, or minor child dies. Members in good standing are also eligible for services, principally help with immigration applications.

When PCUN members gathered at the organization's second annual convention in 1986 first approved the associate member dues system, they set the rate at $9 per quarter and provided that it could be increased only by a secret ballot vote of the membership. During these 25 years, the membership has voted to raise dues on six occasions, never by a margin of less than four-to-one. Along the way, members agreed to assess themselves one-time contributions to major initiatives, including the 1995 "Tenth Anniversary Organizing Campaign," which won a crop-wide wage increase in the strawberry harvest and the establishment of PCUN's low-power FM radio station, Radio Movimiento, in 2006.

The basic methods for assessing and collecting dues have remained essentially unchanged since 1986. Members are sent a simple news bulletin and dues reminder quarterly. Some members pay as much as a year's dues in advance. We use fixed quarters and we have a simple formula for re-aligning lapsed members to that rhythm by collecting two, three, or four months' dues from them. Members can send payment by mail, but most pour into PCUN headquarters during the three business days on either side of the first of April, July, October, and January. Not unintentionally, this contact provides ongoing and valuable opportunities to engage members about PCUN's campaigns and programs.

ALTHOUGH 95 PERCENT OF WILLAMETTE VALLEY IMMIGRATION PROJECT "CLIENTS" WERE ELIGIBLE FOR MEMBERSHIP, MOVING THEM FROM "DONATIONS" TO "DUES" REPRESENTED A CULTURAL SHIFT.

Services and Benefits: Our Foundational Capital

The "flagship" services PCUN provides its members are immigration counseling and legal representation, both offered by PCUN's service arm, the Centro de Servicios para Campesinos (Farmworker Service Center). The Centro pre-dates PCUN by eight years. It was founded as the Willamette Valley Immigration Project (WVIP) in 1977 and promptly gained recognition from the Board of Immigration Appeals, allowing it to provide representation in immigration matters at the administrative level (including family visa petitions and consular applications, naturalization (citizenship) applications, renewal of permanent resident and work authorization cards, and the like).

Legal workers and Chicano community activists started WVIP with little more than our anger—and our determination to do something—about the reign of terror in the Mexican community created by the INS's roving dragnets, workplace and residential raids. In the late 1970s and early 1980s, INS arrested and deported a few thousand workers from Oregon annually. WVIP's immigration defense complemented our strategy of community resistance ("Know and exercise your rights") and it established our reputation as serious, effective, and honest. From 1977 to 1986, WVIP handled nearly a thousand cases, all on a donation basis. WVIP's small staff scraped by financially, first with "CETA" (federal job training) funding. When that ran out, we moonlighted as interpreters, legal investigators, process servers. We taught school, did consulting, and occasionally worked in the fields. In those days, "sustainability" was synonymous with "survival."

Immigration defense and visa help cemented our credibility. That trust prompted workers to bring us all manner of other problems, from workplace exploitation to collections for covering funeral expenses. The need for broader organizing and support impelled us to form PCUN. We appended WVIP to PCUN as its service arm and changed its name. The indignity of funeral "colectas" spurred us to offer an insurance benefit as part of PCUN membership. Though initially only $1,500, the benefit proved its utility and symbolism. More than $200,000 has been paid out through union-based American Income Life Company. For some members, the notion of keeping up insurance coverage reinforced the habit of dues payment.

Good Timing

A few months after we founded PCUN, UFW co-founder César Chávez visited Woodburn and met with our first board. "Don't give away services," he admonished. His advice reaffirmed the conclusion we'd already reached: link services (and benefits) to dues. Although 95 percent of WVIP "clients" were eligible for membership, moving them from "donations" to "dues" represented a cultural shift. We (mostly) patiently answered concerns like, "Why can't I just pay for this [service]?" For the most part, our base went along. Over time, membership grew on them. They owned something.

Seven weeks after PCUN members approved creation of the quarterly dues structure and made membership in good standing a condition of eligibility for services, President Reagan signed the Immigration Reform and Control Act (IRCA). Six months later, IRCA would open the path to legal immigration status for more than three million undocumented immigrants, including thousands in Oregon. PCUN membership exploded, increasing from about 150 in September 1986 to more than 2,000 in May, 1988. The Centro had simultaneously instituted a nominal fee for immigration cases, payable in addition to dues. Even so, the total cost represented only about 10 percent of what a private attorney would charge.

OVER TIME, MEMBERSHIP GREW ON OUR BASE. THEY OWNED SOMETHING.

The flood of new members willing to pay quarterly dues as a part of the legalization assistance process swept away the "donations" mentality. Though many members fell (or moved) away after gaining legal status, we had the momentum we needed to sustain the dues system.

"Says Who?!"

At the height of the legalization "crush" in 1987, a member arrived at the PCUN office anxious to move his case forward. "Your dues are expired," the receptionist informed him. "Why do I have to pay my dues?" the member protested. "Because Larry said so," she replied.

Technically, I did say so. "All members are required to have their dues payments current in order to be eligible for service," I had told her. Her answer to the member underscored both a shortcoming in my explanation and a key dimension of our organization's governance: the members decide. Though I'm sure that, over twenty-five years, we've cut explanatory corners, the answer we can give to dues or membership-only "protesters" is, in my view, both powerful and elegant: "The membership imposed this requirement and you, as a member, have the right under our bylaws to attend the annual convention and propose an amendment to change it." None of the countless recipients of that advisory has ever followed through. Apparently, they weren't very motivated and/or they actually visualized how they would fare—or feel—attempting to sway a hall full of dues-paying members.

PCUN's Principles of Fundraising

Money does not drive our work, nor our organizational strategy; it only affects the speed of our work.

We raise and spend the organization's money in the name of the people we serve, in doing so, we must do it in a manner that meets the interests of our community.

The process of raising funds is also organizing work.

Raising funds must be part of all educational, service, and organizational activities as much as possible and should not be seen as a separate work.

Even though the people we serve generally live in poverty, the workers and community members must be invited to contribute financially to the activities and organizational programs.

What's the Big Idea?

In 2003, PCUN co-led creation of the "CAPACES," uniting in joint capacity building what had become nine sister organizations serving and organizing in the Latino immigrant community in the Mid-Willamette Valley. With a combined staff of 60, the CAPACES network engages workplace organizing, immigrants' rights, farmworker housing development and management, education reform, voter organizing, economic micro-enterprise, young leadership, and ally solidarity, among other areas. CAPACES' trainings prompted us to more clearly articulate the principles underlying our work (see sidebar).

PCUN's dues system bespeaks the last two principles and they are engrained in our organizational woodwork. (The others may deserve discussion but that's a whole other article.)

In 2005, CAPACES inspired me to synthesize a list of twelve ideas that have guided our work over the decades, whether we realized it or not. The PCUN dues and services model stand at the intersection of two of them:

[#3] "Do work which people in the base value and can concretely measure in their own lives, not just work which most immediately or directly advances demands for change."

and

[#7] "Expect and ask those who derive tangible and intangible benefit from our movement to contribute."

THE GRAVITATIONAL PULL OF DUES-PAYING MEMBERS' COLLECTIVE EXAMPLE INSPIRES SOLIDARITY FROM OUR BASE OF ALLIES IN ORGANIZED LABOR, IN RELIGIOUS, COMMUNITY, AND STUDENT GROUPS, ACADEMICS, EDUCATORS, AND LAWYERS.

The services of PCUN and the Centro have generated huge political capital over the years. We only know of a fraction of the occasions where growers, labor contractors, union busting consultants, their minions, and others discomforted by our campaigns for institutional change have attempted to drive wedges dividing workers from PCUN. "PCUN is a bunch of worthless trouble-makers," is the G-rated version of their message. A few workers felt secure or bold enough to defend us head on. Others, no doubt, nodded, feigning approval; most probably said nothing. The growers' rhetoric, however, changed few minds. Workers either knew first hand, or credited reports from their peers about what PCUN has done.

By charging for services and by tying services to dues, we are more vulnerable to our critics' favorite slander: "PCUN is only in it for the money." This accusation is undercut by the fact that we have not actively recruited members; members recruit other members. Many of PCUN's organizing drives have involved workers who were not and did not become members. Only a fraction of PCUN's 5,600 registered members consistently keep up their dues payment. Both of these facts suggest that we have opportunities to expand our financial base.

Finally, the gravitational pull of dues-paying members' collective example inspires solidarity from our base of allies in organized labor, in religious, community, and student groups, academics, educators, and lawyers. Since PCUN's founding, nearly 1,500 individuals and groups have contributed a total of $1,500,000 to support our work. The PCUN annual appeal to supporters in December 2009 opened with these two paragraphs:

The nurseries have scaled back. There's a glut of Christmas trees. Residential construction and landscaping jobs—even part-time ones—are scarce. Like farmworkers and immigrant workers most everywhere, PCUN members are dealing with high unemployment. Some, no doubt, ask themselves: "Can we afford to support PCUN?"

On May 3rd, members set forth a clear answer: "We can't afford not to." That day, at PCUN's annual convention, they voted by secret ballot to increase dues 20% to $12 a month. Only one vote was cast in opposition.

Though many of our allies no doubt faced hard economic decisions as well, donations remained steady.

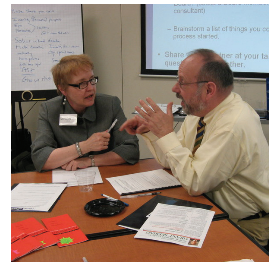
The Bottom Line

"Effectively offer people what they need and value, keep the administrative system basic and consistent." Those fifteen words make it all sound easy and simple. After nearly a hundred thousand payments, a hundred mailings, four database programs, and more than enough hours to fill someone's entire work-life, we still think the work of maintaining PCUN is well worth it. And we see that value every time a minimum-wage-earning farmworker comes to our office with $36 in hand. ■

Larry Kleinman is a co-founder of both PCUN and the Willamette Valley Immigration Project. Since 1988, he has served as PCUN's elected Secretary-Treasurer.







Cause Effective workshop participants sharing their fundraising war stories. Photos courtesy Cause Effective.

The Voluntary Shift

Responding to 30 Years of Shrinking Leisure Time

Judy Levine

FOR THREE DECADES, CAUSE EFFECTIVE has been helping nonprofits transform their fundraising, governance, and special events. As we look back over this time, we are struck by the changing nature of leisure time and the profound impact of this change on the nonprofit sector.

From furtive smartphone checking under the table to the impossibility of finding a meeting time for a committee whose members' work and family commitments have them doing double and triple shifts, the changing nexus between leisure time and work time is affecting volunteer-based fundraising and governance in multiple ways.

What are the impacts of these changes on nonprofits—and how can we adapt what we ask of people volunteering for social change, particularly around fundraising?

Sociologists have charted the squeeze on discretionary time over the past couple of decades. In the 1990s, Arlie Russell Hochschild wrote in *The Time Bind* about the blurring home-work distinction; and in *The Overworked American,* Juliet Schor noted the historic shrinkage of leisure time that came from both additional work commitments and a higher standard of care for children and the household. In the wake of the current economic upheaval, a Harris Poll found that Americans lost an average of 20 percent of their available leisure time from 2007 to 2008 alone.

But lately, and for nonprofit volunteerism especially, the situation seems to be getting worse. Board members are even more distracted: those who still have jobs have often taken on additional assignments at work, and those who've lost their jobs are expending all their energy looking for new work; when they find it, they're absorbed in learning and succeeding in a new professional culture.

The result? Committees without leaders *("I could do a task, but not take on the whole responsibility")*, opportunities left on the table *("It's great that Ms. Connections agreed to be the honoree but we don't have anyone to chair the event")*, and the continuance of the political status quo *("We just couldn't get enough people out to the community meeting to make a difference").*

We recently assisted a nonprofit in an excruciating three-month search for a new board chair. A number of people were willing to accept a limited assignment *("Sure, I'll write 20 thank-you letters")* but not to take on a position they would need to take home and "own." With another nonprofit, we went through two months of failed attempts to nail down a meeting date—with the four committee members so overbooked that two meetings that were calendared fell through at the last moment (the group finally met by phone).

The ultimate symptom of these competing claims on board members' time is boards that pay attention on an episodic rather than a sustained basis—a board pattern that, at best, consists of putting out fires…then not responding…then springing back into action when more fires arise…then more unresponsiveness. Board members coming together to solve

THE ULTIMATE SYMPTOM OF THESE COMPETING CLAIMS ON BOARD MEMBERS' TIME IS BOARDS THAT PAY ATTENTION ON AN EPISODIC RATHER THAN A SUSTAINED BASIS.

a crisis, then reverting to ignoring emails once the emergency is over. Boards ending up reactive instead of generative, with fundraising committees that come together for specific events rather than looking after the organization's overall relationship-building ladder. Boards that are complacent rather than driving nonprofit fundraising and outreach.

You may have read about what's called the Second Shift—that stretch of housework and family responsibilities that await parents as they head home from work—and about the juggling that the electronic tether both enables and demands (come home from work, eat and put the kids to bed, back on the computer for a couple more hours of work). Not to mention the Third Shift—the time that women, in particular, spend as caregivers for family members outside the home.

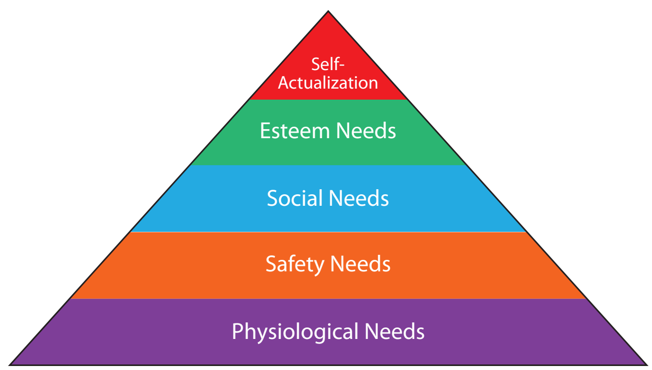
But what about the Voluntary Shift—the time spent caregiving to heal the larger community, indeed the world?

In thirty years of energizing volunteers to participate in fundraising, we've been through lots of periods of economic ups and downs. During that time, government funding has increased, decreased, and even disappeared, pulling the rug out from nonprofit programming. Causes that were "hot" among foundations have lost their luster, with other theories of change taking their place. Corporations have swung from funding out of a sense of community responsibility to using corporate funds for flashier visibility purposes, and back again. But throughout the past three decades, we've always seen a steady increase in individual donations raised through the perseverance of dedicated volunteers.

Adapting to the New Reality

How can we reconcile the time-pressed nature of America in the second decade of the twenty-first century with our continued need for volunteer-based fundraising?

Our first piece of advice is to adapt—not to fight. In uncertain economic times like the present, it is helpful to return to Maslow's famous hierarchy of needs (see Cause Effective's 5/3/10 blog post for a fuller exploration of this pyramid's relevance to fundraising).



Maslow's Hierarchy of Needs

What the pyramid tells us, in essence, is that people can't pay attention to the Voluntary Shift (which is part of self-actualization) until they're satisfied they've met their needs that fall lower on the pyramid. In other words, if someone is hungry (physiological needs), or doesn't know where their kids are going to sleep (safety needs), they can't concentrate on pursuing friendship (social needs), gaining social status (esteem needs), or striving for justice (self-actualization). No matter how much they might like to, they can't focus on volunteering if they're at a lower point on the pyramid at this moment in their life. The answer in that case is to keep the door open while letting them off the hook—for now.

For others who are stressed but somewhere in the middle of this framework, here are some tips from 30 years in the trenches that we've found particularly useful in supporting volunteer fundraisers now.

Make it easy. In a practical sense, this means not insisting on an in-person meeting if you can't get it—or at the least, offering childcare that seems like a plus, not simply low-quality daycare.

This holds true for fundraising activities as well—one Cause Effective client just sold out a previously languishing wine-tasting series to parents because they offered a pizza party and creative arts workshop to the kids at the same time.

Consider making the most of new technology for video chats, document sharing, and the like, so that people can work for you in their own time and space.

Chunk it up. We've found that assignments we used to be able to give out whole ("Thanks for taking on this year's annual appeal, here's the timeline and a template from last year") need to be "chunked" into smaller pieces and divided up. While this strategy can be successful at spreading the tasks across several people who may each be able to do a part, it requires much clearer instructions and more work up front—if something's not in the timeline and someone only has part of the job, they're less likely to notice and the forgotten piece is less likely to get done ("Whoops! Getting stamps wasn't in anyone's job"). It means rethinking the order and even the shape of a voluntary assignment.

Ask for something specific and small. We've seen that asking for a bounded amount of time—say, an evening—is likely to be more successful than giving a take-home assignment with an open-ended time frame. For example, an assignment of 10 follow-up calls is much likelier to get accomplished if the request is for "Next Wednesday evening from 7-9 and then you can go home and leave it behind" than if it's an ask to "Take this list of 10 donors and call them to remind them about this year's annual appeal."

Give end times. One reason special events are so successful at rallying boards to fundraising (even though they take an incredible amount of time) is that volunteers can see the light at the end of the tunnel. "Once it's over I can clean the house"—or take the kids to the zoo, or even spend a day at the beach—goes the volunteer's thinking. The chunk-it-up theory works here too—even if a project is long, lasting a year or more, divide it into smaller pieces so there's always a goal-line in view. Volunteers can sprint, but not forever.

Offer flexibility. In the same way that performing arts organizations now offer subscriptions with maximum options and minimal commitment, we need to ask for voluntary time in ways that volunteers can fit into their lives and their priorities. Also, try a little psychology borrowed from child-rearing—if you offer people a choice they are more likely to choose one of the options and feel in control of the one they choose (and empowered volunteers ultimately feel more obligated to see the task through).

Respect people's time. Run meetings well so people feel their time is used well for deliberation—that it was important that they showed up. And start on time, no matter how many people aren't there—they'll get the message after one or two sessions.

Build the team. Don't expect a small board to manage all the responsibilities of governing and fundraising if you don't have enough people to form viable committees. With clearly stated expectations in hand, continually be on the lookout to recruit more folks who care about your mission and can also find the time to help. Assign partners when parsing out volunteer responsibilities—it's harder to let a person down than an organization, and it's more fun to work with others.

You can also entice non-board members into serving on board committees—that's one way to enlist someone with a special skill or a focused amount of time without their having to sign on to the full package of board service. To that end, recruit volunteers with clear expectations so that people excited about the mission don't commit beyond their time or capacity.

Diversify the pool. Think about recruiting younger people who don't yet have families, or young "professional-board" folks. Like attracts like, so you may want to create a "Young Supporters" group to throw bar parties and the like for your organization.

Create a learning culture. Don't assume that because someone agreed to be on your board ten years ago or even two years ago, they're still filled with the excitement of the mission. Re-cultivate your board members to keep them motivated. For example, ask board members to give out certificates of completion at the youth advocates training—then hold a board meeting right after.

WE NEED TO ASK FOR VOLUNTARY TIME IN WAYS THAT VOLUNTEERS CAN FIT INTO THEIR LIVES AND THEIR PRIORITIES.

In addition, consider providing some form of professional development or training to board members so they feel they are learning for their own futures. Give your board frequent opportunities to learn about the issues that surround your mission and work. Involve them in thinking together with you about what's best for the organization.

Make activities do double duty. Organize volunteering to serve social as well as social justice aims. It's well known that volunteering is a great way to meet people with similar interests. Highlight that advantage by building in collegiality (sharing food at meetings is a quick way to do so). Make sure board members party/eat/socialize together at least once a year, even at the cost of time on organizational business—that bonding is priceless. Add going out to dinner together to one board meeting a year.

Involve kids. Don't assume people can turn off (or hand over) the rest of their lives (see "Make it easy" above). There are so few occasions for family togetherness—make volunteering a win-win by offering this opportunity!

The common denominator to all these tips is that when volunteers can see how to fit the work within their time constraints, they're happy to help.

Here are two more important strategies that make volunteering rewarding enough to raise it above the fray of competing priorities.

Say thank you. Make sure people feel good about their volunteer service with you and that they see the gains their dedication has engendered. Let them know you value their efforts—and make a special attempt to praise them in front of their peers. Create a climate of appreciation.

Recognize small victories. People gravitate toward success. Just as in organizing, we need to call out the incremental wins—and every effort counts. "You made two phone calls—terrific!" It's more important that people are successful at fundraising—and start to view themselves as successful at fundraising—than that they attempt a giant effort and fail. In the midst of the stresses of daily life, voluntary fundraising for our causes needs to be made deeply satisfying for those who engage in it.

Don't Forget Yourself

Finally, the shrinking nature of leisure time has an impact on those of us who work in nonprofits as well.

"If I can't dance, I don't want to be part of your revolution" is a quote commonly attributed to Emma Goldman. Whether or not she actually said it, the attitude remains valid. Those of us working for social change need to recognize the toll that the relentless pace of today's plugged-in environment takes on all of us (Cause Effective's 6/7/11 blog post addresses this), and work to keep it at bay.

Turn it off—at least one day a week. Renew and refresh. Read a novel, go swimming, get on a bike—whatever your passion. Do something with your leisure time that allows you to come back to work reinvigorated and ready to change the world again, one action at a time. ■

Judy Levine is executive director of Cause Effective (causeeffective.org), a nonprofit that for three decades has been helping people transform their passion for mission into an enduring ability to raise funds. She writes a blog on fundraising at CauseEffectivePerspective.net.

Four Essential Tips to Motivate Individual Donors

Mara Perez

AS FUNDRAISERS, WE KNOW SEVERAL IMPORTANT THINGS about people. They are generous. They like success. Despite the financial tremors of the last few years, the American people have continued their tradition of giving.

We also know that the largest portion of donations to charities comes from individuals. But we inhabit a crowded solicitation marketplace: Most people who are givers receive appeal letters from organizations they know and support as well as from others they neither know nor support. So how do we attract people's attention? What can we do as fundraisers to move people to donate and to invest in our cause?

In this article I offer four essential tips to create appeal letters that inspire your prospects to give money to your organization. In an appeal letter, you can take your readers through a journey that captures their interest, gains their trust, and makes them feel a part of the change you create. That's contagious optimism.

The Four Essential Tips

You create a contagiously optimistic environment by unleashing your creative writing skills to talk about what you do best: serving community. Here, I describe the four essential tips that will help you achieve that environment. In addition, you will find a sample letter on the next page that shows how these tips translate into a powerful appeal.

1. **Convey core competencies and values.** In a compelling letter, you have an opportunity to engage your donors in a story that conveys your core competencies and values and demonstrates why these are important to them as donors and to the community you serve.

   In essence, your core competencies matter because of the impact they help generate—describe them in this light. For example, imagine that one of your organization's core competencies is multicultural expertise and one of its programs is to teach English to English-language learners. There can be many impacts of having this core competency applied to your work. These impacts could include participant trust or comfort, exemplary participant program attendance, and pronounced English-language acquisition, including rapid improvement in reading skills. Perhaps your students are able to apply for employment or college admission, which they could not do before your program helped them.

   Whatever your core competencies, briefly describe them and explain how they translate into high-quality services that have direct and positive impacts for those you serve.

2. **Describe effective outcomes**. To illustrate how your services matter, describe your work in terms of effective outcomes. Share vignettes or quotes from staff and the people you serve, or paraphrase a funder's praise for your service and results. Let others tell the reader about your impact in the community. The sample letter includes a funder's quote, serving as an example of how to emphasize outcomes in an appeal letter.

3. **Describe the social returns on investment**. Demonstrate your value to the community by highlighting the social returns on investment that your efforts produce. Put your services front and center in local and broader contexts. Imagine your organization's services and impacts as a wave that expands and enriches the larger society.

   For example, offering educational services for Latino students will clearly make a difference in each of their lives. But how does educating Latino youth enhance community life on a broader scale? In this case, center attention on the Latino community and expand that focus to briefly elaborate on the broader benefits of this work in your community and beyond. Answer the question: What value does your service bring to society beyond the participants you serve? These are the impacts that will show how you create social returns on investment. Specifying and communicating this value

September 1, 2011

Dear Reyna Del Castillo:

Core competencies

Last week, Margarita Flores received her acceptance letter from Stanford University. One year ago, Margarita was still challenged by the English language. She enrolled in our English and leadership development classes, led by our highly competent multicultural and bilingual staff. Margarita accelerated her learning and as a result unleashed her potential and tapped into her self-confidence. A year later, her personal statement for the Stanford application was impeccable and memorable; it earned her a scholarship. We thank you for your role in this and other successful stories. We are writing today with great enthusiasm about the future, and ask you to help with a special gift that will move us toward meeting an important challenge grant and expand the reach of our valuable services.

Effective outcomes

Inclusiveness

Everyone at Win-Win in Education appreciates your financial investment and loyalty. We are excited about what we accomplished in the last year. We recruited and served 250 youth through our educational and leadership development program and assisted them with college and employment applications. Our staff participated in monthly community outreach events, offering information about our educational services to local youth and recruiting new program participants at each event. In addition, we secured new program grants from four prestigious foundations.

Effective outcomes

We are filled with enthusiasm about the future success of our program participants as we continue to deliver powerful educational and leadership services. Sara Grant, Program Officer at the Giving is Receiving Foundation, says:

> *"Win-Win in Education and powerful results are synonyms. I have overseen their grants and assessed their outcomes for three consecutive years. Consistently, we see their program participants enhance their English language skills, write compelling school and job applications, and move from the margins to the center of action enthusiastically and successfully."*

Effective outcomes

Our work not only provides educational services and tools to individual participants so that they may enhance their skills and achievements. Our work is also part of a larger web by producing social return on investments. As the demographic trends in our country shift, we are seeing the Latino population becoming the largest minority group in the U.S. By 2020, Latinos will constitute 20 percent of the U.S. population. The fate of the Latino population is critical for the nation as a whole.

Social returns on investment. Values.

Many opportunities lay ahead for Latinos, especially for the large numbers of young people whose futures are in the making now. We cannot afford to lose the talent of a generation. Our country benefits from the presence and growth of a brain trust that helps fuel innovation, creativity, and success. Expanding opportunities for underserved Latinos and supporting their future now, as individuals and productive members of society, is a powerful way to generate sustained social returns on investment. We wholeheartedly embrace this philosophy, bringing all our resources to our program participants, including our highly trained bilingual and multicultural staff and our state-of-the-art teaching methods and facilities.

Social returns on investment. Values.

All of us together—our students, staff, volunteers, and donors—are integral links in a chain that connects opportunities with success. Your valuable role as a change agent helped move Margarita and many others from the periphery to the center of an active, productive life, helping to clear pathways to real outcomes. Moreover, by working toward expanding social returns on investment we magnify the ripple effects of our participants' successes—society wins.

Social returns on investment. Inclusiveness.

This year, major donors to Win-Win in Education have a unique opportunity to double the value of their gifts as we meet a generous supporter's $50,000 challenge gift. The total of $100,000 to be raised will enable us to expand our reach by helping 30 more promising Latino youth to blossom. We have great plans in place for this special campaign, and to mark the success of our challenge grant we will present our first Chain of Success Award Certificates to current and new program participants next Fall. In addition, we will acknowledge all donors who made this campaign and program expansion possible at the Award Certificates ceremony.

Inclusiveness

Please consider becoming a major donor this year and contributing to the success of this very exciting challenge grant. A gift of $250 or more would place you in the major donor category and go a long way toward helping meet the challenge. We would like to invite you to visit our offices next month to meet and chat with our leadership program participant, Luz Delmar, and me.

I will call you next week to set up an appointment. We would be delighted to see you again.

Sincerely,
Lilly Rosa Garden
Executive Director

P.S. We thank you for giving serious consideration to making a major gift this year. This is a wonderful time to have your gift go twice as far!

gives you a competitive edge and fosters optimism. The sample letter shows how to effectively communicate an agency's social returns on investment.

4. **Highlight inclusiveness**. The impact of your letter will be enhanced through a discussion about inclusiveness. Traditionally, we think of inclusiveness as community engagement, for example, by seeking participant and stakeholder input to keep your work relevant and grounded. In this case, inclusiveness means making your donors an integral part of your agency's accomplishments. When inviting them to invest in this worthy cause, encourage them to tour your facilities, observe programs, or volunteer, or send testimonials about why others help fund your organization. In other words, help donors feel they are an essential part of your agency as opposed to simply a name on your annual report.

   Make sure your donors feel that through their contributions they are part of a cycle of strength, positive energy, and success. This can be one of your pillars of excellence.

The Four Tips in Action

When we apply the four essential tips, we develop a letter that is compelling, engaging, optimistic, and inviting. Here is an example of a letter written to invite a current donor to meet with the senior staff at the soliciting agency. The goal is to strengthen this donor's engagement and commitment with the organization and ultimately have her increase the amount of her annual donation, becoming a major donor to help with the success of meeting a challenge gift. ■

Mara Perez has been delivering fundraising, evaluation, and strategic planning services to nonprofit organizations and educational institutions for more than ten years. Find her at her consulting firm, Mara Perez, Ph.D., Fund Development and Planning Services: svn.net/mperez.

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