

Grassroots Fundraising Journal

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A PUBLICATION OF



Developing Fundraising Leadership



Supporting Volunteer Fundraisers

Create an Effective Fundraising Team

Finding Fundraisers of Color

Maximize Your Board's Fundraising Effectiveness

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In Support of Your Fundraising Leadership...

Jennifer Emiko Boyden

HAPPY NEW YEAR! I want to extend a very warm welcome to subscribers who joined as part of our 30th anniversary celebration last year! And thanks to all of you who shared your love of the *Journal* with the fellow fundraiser activists in your life—you are our best source of advertising!

Two years ago we started offering the *Journal* electronically and threw in access to our archive with the price of your subscription. We also launched a new, more user-friendly website last year, which puts you in control of managing your subscription, updating your record, and setting up a unique user name and password to access the archive.

You can get to the archive at grassrootsfundraising.org/archive or by clicking the “Access Archive” link from any page on the site. Once there, you can sort past *Journal* articles by topic, search by author, or enter key words to search the full content of the article PDFs. Add as many articles and available digital back issues to your cart as you like, and, as long as your subscription is current and you’re logged in, an automatic 100% discount will be applied at check out. I encourage you to check out this tremendous resource!

If you haven’t yet set up your online account, you can register at grassrootsfundraising.org/myaccount. Please try to use the same email address we send *Journal* info to when setting up your account. As always, don’t hesitate to get in touch (jennifer@grassrootsfundraising.org or 888-458-8588 x302) if I can be of assistance in any way. Thank you!

We invested in these technological upgrades to support your fundraising leadership and organizational sustainability—the theme of this issue of the *Journal*. Karen Topakian kicks off the issue with key tips for supporting volunteer fundraisers based on her interviews with five groups of varying sizes and areas of focus. Next, Nisha Anand walks us through the process of creating an effective volunteer fundraising team—from drafting the job description to holding volunteers accountable and showing our appreciation. Byron Johnson follows with a piece on a topic very near and dear to GIFT’s heart—developing fundraising leaders of color. *Journal* Editor Priscilla Hung wraps up the issue with a guide to help you maximize your board’s fundraising effectiveness.

We’re also excited to invite you to our fourth, biennial Money for Our Movements: A Social Justice Fundraising Conference August 10-11, 2012 at the Oakland Marriott. Join social justice fundraisers and organizers from across the country to build and strengthen our collective resources, grassroots fundraising skills, and vision for our movements. More details coming soon—meanwhile visit grassrootsfundraising.org/conference to experience what amazing gatherings these are!

Here’s wishing you all a healthy and happy 2012—we’ll see you at the conference!

A handwritten signature in black ink that reads "Jennifer".

The cost of publishing the *Journal* is covered solely by subscriptions and donations made by people like you.

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Subscribe, renew or make a donation today at grassrootsfundraising.org
or call us toll-free: 888-458-8588 x306. Thank you!**



WE ACT Board of Directors Left to Right: Roberto Lebron, Dennis Derryck, Eric Goldstein, Gregory Anderson, Vernice Miller-Travis, Jeff Jones, Peggy Shepard, Pat Terry, Hope Plasha and Phil Morrow. (Not pictured: Regina L. Smith and Charles H. Allison, Jr.)

Supporting Volunteer Fundraisers

By Karen Topakian

THE SUCCESS OF VOLUNTEERS—including board members—raising money for an organization hinges on many factors. Some are outside of the organization’s control, like the volunteer’s availability, competing commitments, and donor response. But some factors that will make it more likely that your volunteers will be successful are very much within the organization’s purview. These include setting thoughtful criteria for recruitment of volunteers, providing training and positive encouragement, assessing and matching skills and aptitude with appropriate fundraising activities, and integrating volunteers and fundraising into the organization.

I talked with five organizations to learn from their first-hand experiences on building a strong volunteer fundraising team. The organizations range in budget from \$500,000 to \$4 million;

some serve a specific community, while others are international; some have more than 40 active volunteers, while others have no volunteers outside of the board. Despite these differences, a few key lessons emerged that were shared across all of them. Remember, you can start with “best practices” but then need to tailor them to fit your organization’s culture and priorities, as the organizations share below.

Recruitment: Prior Fundraising Experience Not Required

When starting to recruit fundraising volunteers and board members, some organizations’ main criteria is prior fundraising experience. However, criteria that can’t be taught—including belief in the mission of the organization and acceptance of fundraising responsibilities— are generally much more

important as starting criteria because they will result in more dedicated volunteers. Ursula Embola, director of development at WE ACT, mostly looks for people who are passionate about environmental justice, knowing that passion is sometimes more important than skill in motivating others to give or ask for money. The first thing that Mark Camp, deputy executive director of Cultural Survival, looks for in members is that “they readily acknowledge the responsibility of board members to contribute to the organization as ambassadors of fundraising.”

On a practical level, it’s just not always possible for all recruits to have direct fundraising experience. When assessing potential fundraising volunteers, several organizations instead look for transferable skills and attributes. Jovida Ross,

Exhale’s director of programs, sees clear alignment with the skills of their volunteer talk-line counselors, from whom they recruit to participate in volunteer fundraising campaigns twice a year. “Fundraising is about building relationships. Peer-based counseling is all about building rapport. They are well trained at building relationships quickly over the phone. A significant part of their training is practicing listening skills.”

Rebecca Tarbotton, executive director of Rainforest Action Network, often recruits house party hosts; she knows that fundraising experience can be the least important quality of a good host. In addition to interest and excitement in the organization, she looks for people who have a large social network and are known to throw good events. Because hosts are asked to make

a lead gift at their house party, she also looks for people who have the ability and willingness to make a significant personal donation to the organization.

Several other organizations also prioritized the size and quality of the networks that volunteer recruits are connected to as being a primary consideration. Sometimes, when asked to think of people whom they might contact to be donors to the organization, volunteers automatically respond, “I don’t know anyone who can give.” Says Roger Doughty, executive director of Horizons Foundation, “You have to help them probe their list in ways they might not think of. Ask, have they been part of another board? Or who did you go to college with? I try to push in a collegial way.”

Don’t Forget Training

Given that experienced organizations know that bringing fundraising understanding and skills aren’t most important or always possible for new volunteers, they need to dedicate resources to training their volunteers after they are recruited. When their volunteers are board members, many build fundraising training into their existing board meetings or board retreats. Doughty focuses on just a few key things to get his board fundraising-ready: “Creating a safe space with people so they can say, ‘this really freaks me out.’ We make it so they can ask any question. And we do role-plays, getting more familiar with key messaging points,” says Doughty.

In working with her volunteer counselors, “The thing they need the most help with is ‘the ask’ and

Featured Organizations



Cultural Survival

Partners with indigenous communities around the world to defend their land, their language, and their culture.



Exhale

National organization addressing the emotional health and well-being of women and men after abortion. Operates an after-abortion talk-line.



Horizons Foundation

Community foundation rooted in and dedicated to the lesbian, gay, bisexual, and transgender community.



Rainforest Action Network

International environmental organization working to protect rainforests and the human rights of those living in and around those forests.



WE ACT for Environmental Justice

Community-based organization whose mission is to build healthy communities by assuring that people of color and/or low-income people participate meaningfully in the creation of sound and fair policies and practices that protect environmental health.

knowing what to say,” says Ross. In Exhale’s volunteer training they also focus on role-playing and practicing talking points. One of their key talking points is emphasizing that the organization is a community-led and community-funded effort. Exhale also provides their volunteers with exercises to determine whom they might ask in their own networks for a donation.

Many of the organizations I spoke with bring in outside professionals to help with fundraising training, either because of a lack of staff capacity or because outsiders can often command volunteers’ attention in a different way, especially for board members. Cultural Survival has guest speakers come to board meetings to present both theoretical and concrete fundraising knowledge, from how donors think to how to do an ask.

Tailoring Support and Tasks

Providing training for their fundraising volunteers, in addition to equipping them with important skills and knowledge, also helps facilitate a key step in supporting the volunteers: assessing who is ready and who needs more support. The cookie-cutter approach of providing everyone with the same training, assigning them the same tasks, and offering the group the same follow-up support doesn’t always work well when there are varying levels of comfort and experience.

Says Embola, “Part of my job during the training is to watch everyone. We put them in trial situations of donor asks under the supervision of trained facilitators and then determine who is an ace at it and who needs more training.” Doughty recommends accompanying volunteers to a donor meeting before sending them on their own so that staff have an opportunity to see their approach first-hand.

This tailoring of support also extends to the fundraising responsibilities they are expected to fulfill. Cultural Survival specifically looks at two distinct networks of board members: those who have connections to individuals with significant wealth and those who are well-networked with institutional donors, such as foundations or international government agencies. Where their networks lie determines how they support the organization in fundraising.

Rainforest Action Network acknowledges that some people are better suited as hosts for their house parties while others might be better at making the pitch. Good hosts are experienced at throwing events, have large networks to draw from, and can support the organization with their own gift. They’ve found that the most effective people to make the pitch are those who have an emotional connection to their work and constituency, who are not afraid to talk about the money needed to get the work done, and who have the respect of the community.

Bringing it Home

Even after committing the time to strong recruitment, effective training, and tailoring responsibilities, it can be difficult to maintain the momentum of volunteer-led fundraising. The important work of integrating volunteers’ work into the organization can take a few different forms depending on the group.

For example, Exhale is dedicated to creating a culture of fundraising at their organization, much of which is connected to how the organizational leadership views grassroots fundraising. They talk about their fundraising as being community-supported, mission-linked, and part of movement-building—and they share this perspective with all the volunteers they bring in.

Horizons has begun to incorporate a fundraising activity into every board meeting to take advantage of everyone being together. For example, during the mid-meeting break in their three-hour meetings, they team up board members to spend a few minutes making thank you calls to donors. “This activity was met with enthusiasm,” says Doughty. “People feel like it’s a good use of time. It gives them a chance to do something positive all together.”

At Rainforest Action Network, the key is to commit staff support to their volunteers so that support becomes part of the staff’s responsibilities. For their house parties and other fundraising events, the staff manages the logistics, crafts the invitation email (signed by the host) and sends it out, and provides follow-up emails and thank you notes. Their hosts can focus on pulling together their invitation list and getting people to the event, while having a staff person stay on top of the other event details.

One Final Lesson

As you can see, there are many ways to involve strong fundraising volunteers. No matter how you do it, one thing continues to be true and bears repeating: appreciate your volunteers! As summed up by Ursula Embola of WE ACT, “When we brag about our board members, it’s more likely they’ll brag about us. We are very proud of the people we have on our team.” ■

Karen Topakian, founder of Topakian Communications, brings 30 plus years of nonprofit leadership experience to her free lance writing and communications consulting clients.

“I Want to Be a Grassroots Fundraising Leader.”

—An Interview with Yamili Quezada



YAMILI QUEZADA IS AN EMERGING LEADER in her community in Denver, CO, but she is no stranger to leadership. As a community college student and volunteer in community-based organizations, she is hard-working, ambitious, and inspirational. The

Journal talked with Yamili at Padres & Jóvenes Unidos, where she has served as a youth leader for 5 years and is currently their Grassroots Fundraising Organizer. Her fundraising enthusiasm caught their attention and they quickly tapped her to help organize their upcoming 20th anniversary celebration.

Knowing that you could probably work on a variety of things at Padres & Jóvenes Unidos, what compelled you to do fundraising?

I'm the president and founder of the International Club at Red Rocks Community College and we organize events to support global causes. We raised almost \$1,000 for Haiti after the earthquake, so I already had some fundraising experience. But what motivated me to fundraise for my own community was attending the youth organizing summer institute. I heard the story of César Chavez and how he moved his people to contribute. Then we looked at the budget of Padres & Jóvenes Unidos and saw how most of the money comes from grants. It was an eye-opening moment for me to reflect on César Chavez and the idea that our own people should fund our liberation.

We were asked to raise money to help pay for the summer institute because there was a shortfall in the grant funding. Leaders participating in the institute were asked to each raise \$150 in one month. I raised \$300 in two weeks. We considered different options, like sending out a letter or holding an event. We decided that personal, face-to-face asks would be most effective. So I asked my teachers, people who supported me in the past, my peers. We found that personal asks were indeed most effective – and the most challenging, but also the most exciting.

What do you see as the role of a fundraiser?

My goal in my new role at Padres & Jóvenes Unidos is to institute a culture of fundraising, to get the staff, the youth, and the members involved. Most of our members come from working families, really hard-working families. We want to rely more on our community, where everyone can get excited about fundraising and be part of it. My role as a leader is to

develop the needed skills and share them with others. I am proud of being able to include everyone in this larger movement. I think that's what fundraising really allows us to do.

How does the organization support you in becoming a strong fundraising leader?

Padres & Jóvenes Unidos is committed to developing my leadership skills. That's why this work has been really important to me. I came in without a lot of fundraising expertise – they could have found someone else, but they're invested in my leadership development. I really appreciate the opportunity to develop skills and grow. They provide me with support – materials to read, templates and examples, taking me to other groups' fundraising events. Most importantly, the organization provides me with people that I can learn from, especially Elsa Oliva Rocha, my mentor and Director of Operations, and Debra Brown, fundraising staff for the Colorado Community Organizing Collaborative. They give me things to start with and build off of, but also give me room to be creative and improve things.

What do you think makes you a successful fundraiser?

Two things: motivation and ambition. I'm a person who sets a goal and goes for it. When something is important to me, I have a strong drive to just do it. When you're motivated, that enthusiasm is contagious. I want to share it with others!

How would you recommend organizations get others like you involved in fundraising?

I think the best way to motivate others is similar to how I myself got motivated: Do some education, link it to inspiring stories, and show where the organization stands – and where it wants to be. I think it's really hard to get people excited when they don't understand the situation. People need a reason for taking action.

What advice would you give to other people who are just getting started in fundraising or are hesitant to get started?

No excuses, just go for it. Just try it. Just do the personal ask. It was a little intimidating at first and so I had to gain that strength from somewhere else – I got it from the story of César Chavez. Care about the work you're doing, learn about it, and link it to your people's history. Liberation comes from us, the people! This is why we must continue to fundraise. ■



Nisha with the People's Grocery Team she worked with for "Harvesting Justice 2010," their annual fundraising event.

Create an Effective Volunteer Fundraising Team

By Nisha Anand

IN TIMES LIKE THESE, when nonprofit organizations are experiencing tighter budgets and greater needs, using volunteers to help with fundraising efforts becomes an attractive possibility. But it's important to create the right team of volunteers and manage them properly so that they can do the good work you hope from them.

We turn to volunteers to help share the details of our demanding jobs, but there are many other reasons we need volunteers. Volunteers share a commitment of vision and passion. They are all potential supporters, are your cheapest source of PR, and are lifelong advocates for your work. Organizations are encouraged to track volunteer hours in order to show the value of their in-kind contribution. We know it can be hard to determine the monetary value of their work, but any organization with a fantastic volunteer program will tell you their value is priceless.

In putting together a volunteer team for fundraising, there are a few things you can do to help your efforts succeed and increase the passion your volunteers have for your organization.

Develop a Job Description

Every volunteer committee should have a clear job description, with clear roles, responsibilities and expectations spelled out. In addition, a separate job description for the committee chair can help clear up ambiguity and create accountability. Some event committees have the need and the ability to manage different types of volunteers (publicity, logistics, silent auction, etc.). When different members of the committee have differ-

ent jobs to do, having clear guidelines and standards for each type of volunteer is a must. See the next page for a sample job description.

Recruit with Care

Before recruiting other volunteers, have the committee chair in place. The chair must be someone who is well-liked, persistent, and good at managing people. A good chair will inspire people to join and can help save staff a great deal of time. Having a chair involved in the recruitment process also sets up another level of accountability.

Additional Resources

Read other articles from the *Grassroots Fundraising Journal* on working with volunteers by visiting the *Journal* archive at grassrootsfundraising.org/archive.

"Building Your Fundraising Team: Working with Volunteers" by Kim Klein

"In Praise of Amateurs: Why Volunteers Make the Best Fundraisers" by Andy Robinson

"The Care and Feeding of Volunteers" by Michael McKee

"Finding Your Inner Fundraiser: A Self-Assessment Tool" by Stephanie Roth and Kim Klein

Major Donor Campaign Committee

Roles and Responsibilities

(Sample)

The Committee is a small group of individuals committed to seeing Good Org sustain itself, continue its work, and position itself to grow in the future. This short-term team will be instrumental in navigating through Good Org's current financial needs by fundraising and laying the groundwork for long-term sustainability.

By volunteering to serve on the Committee for Good Org, I understand that my duties and responsibilities include the following:

1. I am committing to a three-month term in which I will attend all meetings via phone, Internet, or in person, not to exceed once every two weeks.
2. I will work with all the Committee members to support prospecting efforts by identifying potential supporters and collecting contact information.
3. I will make calls, send emails, and schedule meetings with my potential supporters and ask for donations to support Good Org. I will do this at my own pace over three months knowing that I will only have between 9 and 12 donors to contact (3-4 a month or all at once). I am making a good faith agreement to do my best and to bring in as much money as I can.
4. I will follow through with all logistical information, including creating a plan for accepting donations and sending out personal thank you notes.
5. I will give what is for me and my community a significant donation. I may give this as a one-time donation each year, or I may pledge to give a certain amount several times during the year.
6. I will educate myself around the issues most pertinent to Good Org's work and the larger issues it intersects with.
7. I understand that every member of the Committee is making a statement of faith about every other member. We trust each other to carry out the above agreements to the best of our ability, each in our own way, with knowledge, approval, and support of all. I know that if I fail to act in good faith, I must resign, or the Committee Chair may ask me to resign.

In return, I can expect Good Org staff and the Committee Chair to do the following:

1. Provide information and training in regards to the campaign messaging, Good Org program specifics, and how to ask for money.
2. Keep me up to date with any changes in the organization related to personnel, finance, strategy, or anything else that may inform my fundraising efforts.
3. Support me in my efforts to fundraise by providing all necessary materials in a timely way.
4. Answer any questions or concerns I have regarding the organization over the next three months.

Committee Chair Description:

The committee chairperson is responsible for all of the same tasks as all Committee members but also volunteers to provide leadership and support to the members of the committee. This includes facilitating check-ins, training and support when needed, and holding all members accountable to their agreements.

Signed _____ Date _____

A lot of thoughtfulness usually goes into a staff hire. On the other hand, organizations often recruit volunteers with an “anyone who will show up” mentality. If your goal is to have an effective committee that will help raise funds, every member of that committee deserves to be properly evaluated. Is this person a hard worker? Do they follow through with tasks? Are they easy to communicate with? Do they believe in the mission of our work and enjoy talking about your programs? During the recruitment process, use the job description that you have carefully crafted to engage in conversations with potential volunteers. Rather than send out an email blast to all of your supporters and see who bites, think of who among them you actually want as volunteers and set up a time to talk with them specifically and let them know why you think they are the perfect person for the job.

Create Clear Expectations and Timelines

When we ask volunteers to be a part of any fundraising effort, we have to set them up to succeed. Too often we ask them to step in and help us raise money without a lot of support and guidance. Creating clear expectations is necessary for accountability and success. This means that before your team is in place, you should have goals set (amount of money to be raised, number of advertisements sold, event sponsors, ticket sales, etc.) and deadlines by which to meet those goals. The chair or staff support person should schedule check-in times before each deadline to offer support to each volunteer in meeting those goals. (See the sidebar for sample goals and timeline to use with volunteers.)

SAMPLE VOLUNTEER FUNDRAISING CAMPAIGN TIMELINE

The campaign has a very compact three-month timeline. Each member on the team will be given approximately 12 prospects to contact over the course of three months—averaging 4 prospects a month. Because of the summer timeline, we highly encourage contacting more people earlier if possible. Regardless of when prospects are contacted, our goal is to have half of the money raised by the halfway mark; we will be checking in with all team members regularly.

Prospecting Phase

Prospecting and Training:

May 2-6

Matching Prospects and Distributing Information:

May 9-13

Asking Phase

Calling Begins: May 16

Check-in Date 1: June 6-8

Halfway Mark: June 27

Check-in Date 2: June 27-29

Check in Date 3: July 27-29

Final Push Week: August 3-12

End of Campaign: August 16

Follow-up and Summary Work

Follow-up, etc: August 16-30

Celebration Fundraiser: TBA

SAMPLE VOLUNTEER FUNDRAISING CAMPAIGN GOALS

By far, the most effective way to raise money is to ask for it directly. Although strategies, such as mailing (1% response rate) and canvassing (10% response rate) are very common, a direct ask yields a 50% or greater response rate. Keeping this and other fundraising fundamentals in mind, Good Org has developed the following goals and, with your help, we are confident in its success.

Number of Prospects	Giving Level (ask amount)	Number of Gifts Expected	Total Amount at Giving Level	Assumptions:
4	\$5,000	2	\$10,000	<ul style="list-style-type: none"> • 15 people on team • Each ask 4 a month • Enough prospects are generated at each level • Standard 50% response rate
10	\$2,500	5	\$12,500	
18	\$1,000	9	\$9,000	
36	\$500	18	\$9,000	
52	\$250	26	\$6,500	
68	\$100	36	\$3,600	
188		96	\$50,600	Result: 2 months' operating cost

Cultivating Accountability

Volunteers are not held accountable by salary, staff reviews, or evaluations. The mission of your work should be the guiding force to motivate everyone involved to do the work that needs to get done. Because of this, having messaging techniques in play that keep your organization's mission in constant view helps volunteers fulfill their responsibilities. It is not staff who will be let down if things fall through—it is the clients you serve, the beneficiaries of your good work.

If the mission is not enough to keep your volunteers on track, there are a few helpful methods to build in accountability. First, having an in-person meeting with your committee at the start of the campaign is critical. People bearing witness in front of each other is powerful. They have all heard the same goals, timelines, and expectations. They know that success for the event or campaign depends on each one of them following through with their work. They make a commitment to each other not to let each other down. In the same vein, scheduling conference call check-ins with most of the group also helps. In addition, everyone on the committee should be encouraged to share their successes on the group email or listserv. There is nothing like positive outcomes and encouragement to motivate the procrastinators in the group.

Coaching and Management

A successful volunteer program should contain intentional places for growth, professional development, and skill-building. The chair of the committee or the staff person in charge of volunteers should take some time to get to know each individual involved in the work. Of course, we should place volunteers into positions that match the skills they already have, but we should also provide them enough of a challenge to grow into new areas. Are they uncomfortable asking people for money but are really good at direct sales? Have them do a lot of ad sales and point out the close relationship between selling ads and asking for donations, then coach them through their fears around asking for money. Encourage them to do one or two direct asks.

A well-coached volunteer whose development is taken seriously stays with the organization for the long term. They volunteer more, recruit more volunteers, and become future board members or staff applicants. Coaching does not have to be time-consuming work—it can be as simple as a shared article, a free training, or a key referral. A more robust volunteer development program may provide group coaching, peer coaching, or staff mentoring. Creating a culture that demonstrates your belief in uplifting and encouraging everyone both forwards

your mission and solidifies commitment and accountability to your organization.

There are no perfect committees. It is important to always account for some of the work not getting done or a few of the volunteers struggling with their commitments. Life is busy and stressful and our big hearts sometimes over commit us. Realize that volunteers are giving their time freely and that things come up. When you have good relationships with your volunteers, you can make thoughtful accommodations. One of the best signs of a well-run volunteer program is when a volunteer feels comfortable calling the committee chair or staff person to let them know where they are struggling. Often, we can provide powerful mentorship to volunteers having trouble with their tasks. When a volunteer starts avoiding calls and emails, it is a sign that they are overwhelmed. Instead of being angry or annoyed, let them know it is OK and that you have a plan in place to help them with their work. Then follow through with that plan. Schedule time in the later stages of your timeline to do follow-up for committee members who may have fallen short. Often, the chair can take on this work or you can have one committee member “on call” for that week to provide extra support.

Appreciation

When volunteers work for our organizations, we want them to complete their commitments loving the work even more than when they started. Too often, the event or campaign concludes and we all rest and put it away until next year. Throughout the campaign, celebrate successes and highlight individuals' work. Show appreciation at the event in a thoughtful or creative way—not just a general “thanks to all our volunteers.” But volunteer work should be acknowledged after the event as well. A personal thank you call from the staff, the committee chair, and/or the board chair is in order. A complete debrief with the group is also critical. The volunteers who were most involved in the work will have great ideas for the next year. A well-run committee will have no problem getting renewed commitments from volunteers for the next year.

Creating a fun, successful and fulfilling volunteer committee does take some time and consideration. However, the time you put into it in the beginning will pay off, in both dollars and vision, for years to come. ■

Nisha Anand is a consultant, trainer and coach working with individuals and organizations in social justice movements. She is based in Berkeley, CA and is a proud mother of two.



Participants from the 2010 Los Angeles Fundraising Academy for Communities of Color at their graduation.

Growing Your Own

Finding (People of Color) Fundraisers in Our Midst

By Byron Johnson

A FEW YEARS AGO I was facilitating a fundraising workshop with a group of community arts organizations when one of the participants, a person of color, asked whether it was better to hire a white person than a person of color as a development director. The implication was that people with big money were white, so wouldn't it be best to have a white person as a fundraiser if you wanted to raise big dollars.

My first thought was: Wow, what year is this? Do people still think like this? As we began to probe the question of what it's like raising money as people of color, a couple of questions kept coming up: Why aren't there more seasoned development folks of color? How can smaller, neighborhood-based, ethnic-centered arts organizations attract those who do exist?

Growing Your Own

As is the case with just about every other profession in the United States, fundraisers are overwhelmingly white. The Association of Fundraising Professionals, the professional association of individuals and organizations that generate

philanthropic support for a wide variety of charitable institutions, counts only 11 percent of its more than 31,000 members as people of color.

Thus we have a crisis and an opportunity. People of color-run organizations need fundraisers of color in order to raise money more effectively in the communities in which we work, and to legitimize the fundraising profession in the eyes of our program and admin-oriented colleagues. When people of color take on fundraising responsibilities, other staff of color are more likely to participate in fundraising activities, thus increasing the overall effectiveness of the organization's fundraising efforts. They may even see themselves in that role, thereby increasing the number of fundraisers of color in the profession.

Unfortunately, organizations that are staffed mainly by white people are also competing for the few fundraisers of color, as they reach to attract, cultivate, and steward donors of color. That's the crisis.

The opportunity? Organizations based in communities of color can serve as training grounds for future fundraisers of

color. What if we grew our own fundraisers of color from our non-fundraising staff, board members, and volunteers?

The first question that springs up is one of skills: just what are the skills and qualities that a development person needs to succeed? Here are ones I consider essential for any fundraiser:

1. Passion for the mission. Effective fundraisers must be passionate about the organization's mission; often, shortcomings in the other skill areas can be overcome with enough belief and commitment driving the person to develop the skills he or she will need to be effective in the job.

2. Good communication skills—both verbal and written.

For fundraising to be effective in our communities we have to be creative and responsive to how things are done in a given community, and not make assumptions about either what a donor looks like or how they are supposed to act.

Fundraisers do not have to be great orators or riveting public speakers; rather, they should have really good listening skills and be able to stay on message when presenting the case for support or talking about the organization and its mission. Even if grantwriting is not one of the areas of responsibility for a particular fundraising staff position, writing skills are required for fundraising appeals, newsletters, online content, thank you notes, and regular communication with donors.

3. An open mind. To be successful in grassroots fundraising, you must be open to new people and ideas and ways of doing things. For fundraising to be effective in our communities we have to be creative and responsive to how things are done in a given community, and not make assumptions about either what a donor looks like or how they are supposed to act.

Other skills and knowledge about specific fundraising strategies—including direct mail, special events, major donor campaigns, and online giving—can be acquired and/or polished through classes and workshops, good supervision and support, and most important, with practice.

People can also work into a fundraising position. I recently worked with a small advocacy organization that was participating in the Fundraising Academy for Communities of Color, an eight-

month intensive training and coaching program co-sponsored by GIFT and CompassPoint Nonprofit Services. The development director of this small advocacy group was the primary attendee for the Academy, but one of the program staff people began attending as well because she was interested in getting more involved in the organization's fundraising efforts. Thanks to the learning she did at the Academy, the program person began taking on more development tasks. When the development director left her position after the Academy ended, the program staffer was hired to fill it.

Here's a word of caution, however. In that same training

program, another organization transferred one of their program staff into a fundraising support role. Her hard skills were very good—she was an effective writer, researcher, and project manager. However, she lacked people skills and was not comfortable meeting with donors, preferring to stay with more “behind-the-scenes” activities such as research and writing. Ultimately, she stagnated in her development as a fundraiser. This might

Resources for Fundraisers of Color

In addition to GIFT, here are some resources that focus on fundraisers of color:

Association of Fundraising Professionals “Diversity in Fundraising” resources, including their newsletter, Kaleidoscope
afpnet.org/About/content.cfm?ItemNumber=3120

Fundraising Academy for Communities of Color (a joint program of GIFT and CompassPoint)
compasspoint.org/fundraisingacademy

Multicultural Alliance of the Association of Fundraising Professionals Golden Gate Chapter
afpgoldengate.afpnet.org/MCA/MultiCulturalAlliance.aspx

People of Color Affinity Group of the Alliance for Nonprofit Management
allianceonline.org/affinity-groups

have been prevented if the organization had been clear about its needs and the requisite skills to fill them.

Finders Keepers?

What if you are able to find someone on your staff whom you are able to develop into a very good fundraiser for your organization? Can you afford to keep them and compete with larger (often white) organizations that can pay higher salaries and provide more benefits?

You can if you provide them with opportunities for professional development and growth—both in honing their fund development skills and through mentoring, coaching and role modeling.

In the San Francisco Bay Area we are blessed to have programs like the Multicultural Alliance (MCA), a professional development and networking program of the local chapter of the Association of Fundraising Professionals that serves people of color and LGBT fundraisers.

MCA provides monthly educational opportunities, training workshops, timely discussions, and access to other professional development and networking opportunities that enable program participants to hone their essential fund development skills. They help break down the isolation that many fundraisers of color (and LGBT fundraisers) feel as minorities in an otherwise extremely diverse nonprofit sector in the Bay Area.

Check out your local AFP chapter for a mentorship program; although it may not be specifically oriented toward people of color, it can nevertheless provide an important opportunity for development folks to support each other through peer learning.

GIFT is also an important source for trainings, materials, and its biennial conference that brings together the most diverse group of people of color fundraisers in the country to learn from and support each other in gaining new skills and knowledge.

Professionalization of the Sector: Another Source?

I find it interesting that more and more development people of color have gone for advanced degrees, such as a master's degree in nonprofit management, to give them a leg up in advancing their careers. These next-generation fundraisers of color have chosen development as a career path and see themselves as future leaders in philanthropy. This is a welcome shot in the arm for diversity in the field.

Typically, these new fundraisers have not only purposely chosen the profession but also the organizations they choose to work with based on a combination of fit, mission, and organizational culture and values that are in sync with theirs.

I've met a few fundraisers who actually identified the organi-

zation they wanted to work for and actively sought a fundraising position there. In all of these cases the organization had a need for fundraising help and was only too happy to create or fill an existing development position to take advantage of the opportunity presented to them.

What Else Can You Do?

Although I don't suggest holding out for some up-and-coming fundraiser of color to come knocking on your door looking for a job, there are a few things you can do to make your organization attractive to fundraisers of color and to make it easier to develop good fundraisers from existing staff or volunteers.

1. Look at your hiring practices. What are the patterns that you notice? I've worked with organizations that lament their lack of diversity in staffing with no insight into the barriers their hiring practices present. One organization I worked with didn't realize that it was a barrier to require a bachelor's degree for all of their jobs, including the administrative ones. Further, they hadn't noticed that everyone on staff had attended a liberal arts college on the East Coast, which may reveal an underlying bias in who they're willing to consider hiring.

2. Be clear about your expectations of your fundraising staff. It's important to make clear that fundraising requires a team effort of everyone in the organization, and that one lone staff person cannot do it all. Most situations where a fundraiser doesn't last in their position are the result of a disconnect between what the organization expected and what the fundraiser understood their job to be.

3. Check your assumptions about what kind of person is a good fundraiser. Part of having consistent expectations of each other is developing clarity and understanding of the organization's values and attitudes toward money and fundraising and its assumptions about what charitable support looks like.

The bottom line is this: fundraising is a program just like other direct-service or client-centered programs. It should be treated as such when looking for staffing and deciding the essential skills and attributes needed for its particular purposes.

Organizations based in communities of color have historically been creative in hiring staff and figuring out how to deliver on their mission; fundraising, despite its focus on money and outside support, should be no exception. ■

Byron Johnson is a senior project director at CompassPoint Nonprofit Services where he's part of a team of folks working to intensify the impact of fellow nonprofit leaders, organizations, and networks as we achieve social equity together.

Finding the Right Fundraising Structure for Your Board

A Quick Guide

By Priscilla Hung

INVOLVING THE BOARD IN FUNDRAISING and helping them develop their fundraising leadership is an ongoing challenge for many organizations. Sometimes, board members are reluctant to participate in fundraising because of their discomfort with talking about and asking for money; sometimes, lack of board involvement is about the organization not knowing the right strategies to engage board members. Other times the board or the organization itself isn't functioning well overall, so fundraising is also ineffective. But sometimes, the problem relates to structure—that is, how fundraising activities are decided upon, who leads the work, and how board members participate.

When organizations are trying to figure out what role the board should play in fundraising, they often default to the structure they are most familiar with or that they've heard other organizations use; the most common is having a more or less permanent board committee that takes the lion's share of responsibility for the organization's fundraising. What people often don't realize, however, is that there are many viable structures to choose from or to create and that, to be most effective, these structures should be matched to the culture and capacities of the board.

Over the years, the *Grassroots Fundraising Journal* has published several articles describing different possible board structures for fundraising (see sidebar). In this article we provide a brief overview of each of these ideas to help you start

comparing them. There are undoubtedly other options that are not included here, and some groups have created hybrid structures that incorporate different aspects of each of these. The key is to not stick to a model for the sake of the model, but to create a structure that is informed by the board itself.

Choosing and Using the Models

Before considering the appropriateness of each structure for your organization, consider the following questions:

- *Where is our organization in terms of our fundraising culture?* Does our organization have a strong track record in fundraising—a clear plan, experienced staff, board leadership, and infrastructure, such as a database that serves our needs? Or are we starting anew?
- *What do we want our organization's fundraising leadership to look like this year?* Is the staff leading? The board? The board chair or someone else? Or is there an equal partnership between board and staff?
- *What kind of learning opportunities does the board want to prioritize this year?* Do board members want direct fundraising skills-building? Or to learn about starting new practices and habits? Or taking their experience to the next level? Or leadership?
- *How do we work together best?* Is our work most dynamic when working together as a full board? Do we work best in smaller groups or committees? Or as individuals?

It is not up to the staff to choose the best structure for the board. The board should be tasked with this decision, with the discussion being led by the chair of the board. This mutual decision-making creates more buy-in and ownership from the board itself, and it sets the precedent for the board chair to be involved at a leadership level, regardless of which structure is chosen. When a structure is decided upon, be sure to set a timeline for evaluating it, such as one year later, and then make modifications as needed. (More on evaluating structures below.)

The five models that follow are just starting points. With thought and discussion, tailoring the models to fit your organization's needs will result in a structure that has broader buy-in and greater effectiveness.

Additional Resources

Check out these articles at grassrootsfundraising.org/archive to learn more about the different structures.

Subscribers can download the articles for free!

"Contracts with Board Members: A Working Model" by Octavia Morgan

"How to Get Your Board to Raise Money – Plan X" by Kim Klein

"The Seasonal Board: Shorter Commitments Create Greater Involvement" by Jill Vialet

"53 Ways for Board Members to Raise \$1000" by Kim Klein

Five Model Structures to Involve Board Members in Fundraising

OPTION 1: All board members participate in all organizational fundraising activities

For many boards, everyone is involved all of the time. All board members are expected to participate in all fundraising activities the organization carries out.

Pros: The board does not need to plan ahead of time who will be involved in what, which is different from the other structures discussed here; all board members are exposed to all fundraising activities; brings the full capacity of the board to each activity; can help reluctant board members find hidden talents and interest.

Challenges: This approach doesn't match board member skills and interests to activities, which can lead to more obstacles to involvement or to board members feeling that their skills aren't used well; can lead to board members feeling that they are being used only to raise money; can lead to board members feeling that they are always scrambling, while staff feel that they are constantly trying to wrangle board members to fulfill fundraising responsibilities; can put the bulk of the fundraising burden on staff.

This may be a good structure to consider if the organization is just getting started in grassroots and donor fundraising and board members are learning and planning as they go. This approach can also be preferable for boards where members do not have much fundraising experience and can learn by being involved in a variety of activities. This kind of structure is common in all-volunteer organizations and groups that have an active working board. If the organization has staff, this structure often puts the bulk of the fundraising leadership on staff and requires sufficient staff capacity to be successful.

OPTION 2: The standing board fundraising committee

Many boards organize their work into standing committees, such as governance, board development, and finance. A standing fundraising committee is usually chaired by a non-officer board member; its purpose is to lead and work on all board tasks related to fundraising.

Pros: This approach provides a clear body within the board that is responsible for fundraising; the board plays a clear leadership role for fundraising; the committee provides a voice for the board in deciding on fundraising strategies and how to carry them out; the committee can help delegate and divide up tasks.

Challenges: Because the same people are always working on fundraising the work can get stale; this approach can lead some board members to believe that they do not have to fundraise if they are not on the committee; it has the same challenges as all committees do regarding clear goals, recruitment, and the need for a strong chair.

This structure is likely appropriate if the board already uses a committee structure and finds it to be effective. It works best when the head of the committee is a strong fundraising leader.

OPTION 3: Individual fundraising commitment contracts

Individual fundraising contracts basically derive from a form that outlines a menu of options that board members can choose from to fulfill their fundraising responsibilities. Some choices may be required (such as making a donation that is personally significant), while others may be optional (such as participating in major donor visits). Some activities may be individual (such as hosting a house party), while others may be group-oriented (such as joining the phonebanking committee). Each board member usually fills out and signs such a form each year.

Pros: Board members can choose which fundraising activities they want to participate in, making it more likely that they will follow through and that they are choosing activities of interest to them; a written form makes it easier to hold board members accountable to their commitments; makes it easier do yearly planning because members have committed to plans at the beginning of the year.

Challenges: Although each board member makes an individual commitment, a central leader is still needed to support and remind them to carry out those commitments; members don't necessarily work together, so their individual activities are often not coordinated; because the activities are individual, it can be difficult to have people stick to deadlines or gain momentum from the group.

This structure may be best if your board members are geographically dispersed and are likely to be doing their fundraising individually anyway. It also works well if board members are fairly self-directed and already have some experience in fundraising, or if members vary widely in the types of activities that interest them.

OPTION 4: The board-led campaign or event

Rather than having board members participate in several fundraising activities over the course of the year, another option is to have all board members lead and participate in just one major fundraising campaign or event per year.

Pros: Because there is only one activity per year, it is often easier for members to prioritize involvement in that activity when it comes around, and members are likely to put in more effort to accomplish it; this approach provides a clear structure for the board to take leadership on its designated fundraising task.

Challenges: Board members may not—and may be resistant to—get involved in other fundraising activities; it can be risky to put everyone’s effort into just one activity, especially if the event doesn’t end up meeting key goals.

You may want to consider this structure if the organization already has a signature event or campaign that brings in a large bulk of the year’s fundraising income, such as a gala, film festival, or major donor campaign. This structure also works best when the board works well together as a team, and it can be a good way to develop teamwork among board members.

OPTION 5: The seasonal fundraising committee

The seasonal fundraising committee differs significantly from a standing committee. In this structure, ad hoc committees are formed for each fundraising activity that the organization has planned for the year. People are expected to serve on only one committee and be marginally involved in the organization’s other fundraising activities.

Pros: People only have to focus on one activity per year, making it more likely that they will put in their full effort and not feel tapped out; because there are multiple committees, more board members will have the opportunity to play a leadership role.

Challenges: You don’t get full board thinking in each fundraising activity; because each committee likely will have different levels of experience, you need ample staff support; there may be a lack of continuity from year to year as the committee membership changes.

This structure requires a large enough board that there are enough people to serve on only one committee each. For example, if you have one fundraising activity per quarter, and want at least four people for each activity, you will need 16 people overall. Clear expectations need to be set for how the non-committee board members participate in fundraising so that they don’t assume that they don’t need to participate at all. Clear processes for the ad hoc committees and documentation of their activities and results will also be needed.

It’s worth re-stating that these descriptions are meant to serve as a starting point for your board discussion about board members’ involvement in fundraising. Your board may decide, for example, that the best structure is having everyone work on one board-led event combined with a standing fundraising committee that coordinates the board’s leadership of the event in partnership with the staff and in the context of an individual commitment form that members fill out to indicate the event commitments they’re willing to make (such as find five sponsors and sell twenty tickets). Thoughtful creativity is encouraged!

Don’t worry about finding a one-size-fits-all structure—instead, focus on creating the structure that fits your board now (and keep in mind that it may not fit your board forever).

Evaluating Results One Year Later

Once you’ve worked with a particular structure for a while—say, a year—take a look at how well it’s working for your organization. Keep in mind that it can take time for a new structure to take hold and flourish. Even if the first year’s results don’t meet the goals or expectations, that doesn’t necessarily mean that it’s time to try something new—perhaps a little tweaking of the structure will help it to work better.

Although the evaluation questions will vary depending on the organization and model used, here are some issues to consider to get you started:

- How did we meet our goals in terms of dollars raised, donors reached, skills and leadership built? How did the structure help or hinder reaching those goals?

- Was the structure effective for us? Did we have clear communication, clear roles and expectations, increased board leadership? Did the fundraising workload feel like the right balance between board and staff? Did board members feel like they could excel in their fundraising tasks within the structure?
- What changes can be made to make this structure more effective? Are there small adjustments or modifications, or are major changes needed? ■

Priscilla Hung is the editor of the *Grassroots Fundraising Journal* and former executive director of GIFT.

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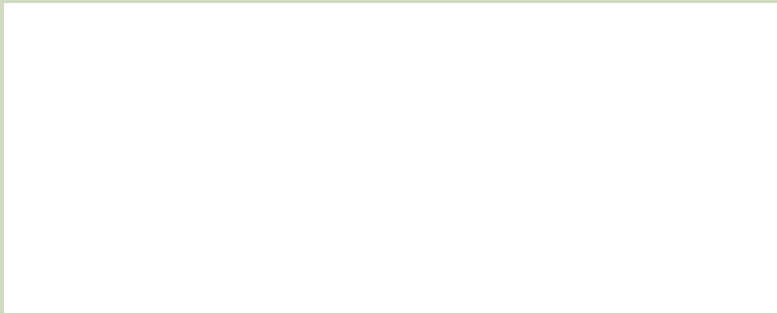
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