Grassroots Fundraising Journal

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A PUBLICATION OF
GIFT
Grassroots Institute for Fundraising Training

Measuring Our Success

Money for Our Movements Keynotes

A New Approach to Evaluation

The Fundraising Summit

Breaking with Tradition: From the Auction to the FamBam!

Contents

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FEATURE

On Our Cover

The Seattle Young People's Project (SYPP) is a youth-led, adult supported social justice organization that empowers youth (ages 13-18) to express themselves and to take action on the issues that affect their lives. In this issue of the *Journal*, Yasmeen Perez talks with former and current SYPP co-directors about the evolution of their annual special event.

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Ease into Evaluation

By Jennifer Emiko Boyden

BY THE TIME YOU READ THIS, we will likely know if President Obama will be serving another term in office or if Mitt Romney will be moving into the White House. Either way, our work to protect the rights of our communities and build the resources needed to do so will continue, though some of us may find ourselves looking over steeper budget cliffs than others.

Here in California, a state whose budget deficit is estimated at $16 billion, the Schools Public Safety Protection Act, or Prop 30, would raise taxes on California's highest earners as well as temporarily increase the state sales tax by 0.25 percent. If this initiative fails, $500 million will be cut from state colleges and universities, and $5.5 billion will be cut from K through 12 education. Already 47th in the nation in education spending, California really can't survive any more cuts.

At the recent Money for Our Movements: A Social Justice Fundraising Conference, Kim Klein underscored the importance of achieving fair and just tax policies as a necessary step towards building sustainable resources. Saru Jayaraman of Restaurant Opportunities Center United and Attica Woodson Scott of District 1 Louisville Metro Council and formerly of Kentucky Jobs with Justice, kicked off the conference by sharing inspiring stories of how integrating fundraising and organizing can create real change for marginalized communities. All three of these speeches were so powerful and thought-provoking that we have excerpted them in this issue of the *Journal*.

With so many struggles ahead of us, building in time for evaluation and planning can be challenging. The articles in this issue of the *Journal* illuminate how making the time to do so can reap huge rewards. Long-time GIFT trainer and fundraising consultant Miguel Gavaldón shares a cutting-edge tool for evaluating what motivates your donors to give, which in turn can inform next steps and strategies to increase donor retention and gift amounts. Ari Wohlfeiler, grassroots fundraising coordinator at Jewish Voice for Peace (JVP), follows with a detailed description of JVP's Fundraising Summit, which resulted in a stronger shared vision and increased fundraising leadership. Finally, *GFJ* Editorial Board Member Yasmeen Perez interviews former and current co-directors of Seattle Young People's Project about the process they underwent to move away from a near 20-year tradition—the silent and live auction—to an event that is fun, fresh, and more closely aligned with their mission and values.

Many of you are likely working furiously on election issues on top of your fall fundraising campaigns. I hope that before the end of 2012, you will be able to slow down, spend time with loved ones, and take care of yourselves and each other. And, I hope this issue of the *Journal* will help you get 2013 off to a great start!

Jennifer

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Saru Jayaraman, Kim Klein & Attica Woodson Scott. Photos by Zoila Aviles, Hueso Productions

GIFT 2012 Conference Keynotes

IN AUGUST, OVER 700 PEOPLE GATHERED at GIFT's Money for Our Movements 2012 Conference to be challenged and inspired to think bigger and bolder about how to connect our fundraising work to our overall efforts for social justice. Below are excerpts of the speeches from our three plenary speakers. Watch video of their full speeches on GIFT's website at grassrootsfundraising.org/conference.

EVERYONE CAN BE A MEMBER

By Saru Jayaraman

Over 10 million workers nationwide are employed by the restaurant industry. The National Department of Labor reports that restaurant workers are the lowest paid workers in America—below farmworkers and domestic workers. This is especially sad given that it is one of the most profitable and fastest growing industries.

The minimum wage for tipped workers has been frozen for the past 21 years at $2.13. Most earn less than $3 per hour, so, for the most part, they live on our tips. The result is incredible poverty, as you can imagine. Almost every restaurant in America, including the finest dining restaurants, has at least one worker who is homeless or teetering on the brink of homelessness. We have people living under a bridge while working in Chef Emeril's restaurant in New Orleans. Our studies show that 90 percent of restaurant workers do not have paid sick days, which means that two-thirds of the people who cook, prepare, and serve your food are doing so while sick. $2.13 is not enough for anybody.

Restaurant Opportunities Center (ROC) has grown rapidly mainly due to the demand of workers and employers. We have had to grow our resources to build the organization. We are not experts in grassroots fundraising—and a lot of our funding comes from foundations—but there are nevertheless a few things I can share.

We have been creative about how our 10,000 members can contribute to keeping our organizing and resource development aligned. We charge dues, which we use as a leadership development tool. Restaurant worker leaders have been the ones to lead the efforts to collect dues. We have collected them at meetings and other member-organized events, including ones where they showcase their talents in food, bartending, or art.

The member contribution strategy that is most lucrative is when workers donate part of their winnings from lawsuits. Because ROC invests extensive resources to fight alongside workers to get employers to do the right thing and pay millions of dollars in back wages, our leaders instituted a rule that workers donate 10 percent of what they win back to ROC.

We have had large and small campaigns, but sometimes the small campaigns are lucrative in ways that we don't expect. A couple of years ago, we were engaged in two huge campaigns involving thousands of workers in high profile places. In the middle of that, a group of twenty immigrant workers from a small café came to us for help because they had not been paid. We told them we were in the middle of these huge strategic campaigns, but we could help them self-organize. So we trained them, and they organized on their own, winning an amazing settlement that included paid sick days and holidays, vacation, and $200,000 in back wages. This amount is small compared to other campaigns we have been involved in, but unlike what we have seen with workers at high-end restaurants, these workers decided they wanted to give more

than the 10 percent and ended up donating $25,000 to ROC. More importantly, we found out that the café is the restaurant in all of the Equinox gyms in New York, so the policy wins ended up affecting thousands of workers.

The biggest lesson for me from the past ten years has been that it is important to be creative and strategic about who our constituency actually is. You probably think that it is just restaurant workers. But we have actually completely changed our thinking over time. Our constituency has continually grown as ROC's work and vision has expanded. It started with immigrant workers right after 9/11, then all workers—white, black, U.S. born—all over the country. Then it expanded to include employers who partner with us to do the right thing.

The ultimate frontier for us is consumers. Almost every single person in America is touched by the restaurant industry. We realized a couple of years ago that the ridiculously low minimum wage and lack of paid sick days would never change if we didn't reach the widest possible audience. I don't just mean the 10 million restaurant workers. Every single person who eats out needs to understand what is happening behind the kitchen door.

We weren't getting very far in Congress because of the power of the opposition. Then something happened. Michael Pollan wrote *The Omnivore's Dilemma*, and Eric Schlosser wrote *Fast Food Nation*, alongside several other books, causing an exploding interest in the restaurant industry and food.

Suddenly, consumers were asking, "Is this locally-sourced? Is this organic? Is this free-range chicken?"—and the industry was responding. Imagine if people asked, "Do your workers get paid sick days? Do your workers only get paid $2.13? Do you have free-range people and not just free-range chicken?" Imagine the impact that would have on the restaurant industry.

So we started engaging people as consumers and realized how much power there is in this role. This started informing our strategies of investing in books, YouTube videos, and movies to reach a wider and wider audience.

The lesson is not just that our members can be donors. But that our donors can be members. They can provide resources to the organization, and, most importantly, they can help us win. We recently worked with Congress to introduce a bill that would raise tip worker minimum wage to $5. This is the first congressional leadership we have seen on this issue in 15 years. We haven't won it yet, but it is a huge milestone that was made possible due to reaching a wider and wider audience.

The greatest lesson for ROC is that this expanded vision has expanded our ability to raise resources—and our ability to win. We have to stop speaking just to ourselves. Everyone is impacted by the issues we care about. For me, there has never been a better moment than now to reach the widest possible group of hearts and minds, and to not just think about those people as donors, but as partners who can help us ultimately win.

Saru Jayaraman is co-founder and co-director of the Restaurant Opportunities Centers United (ROC-United) and an assistant professor at Brooklyn College.

10 WAYS TO TURN FUNDRAISING INTO ORGANIZING

By Attica Woodson Scott

1. Know why you are here today and what brings you to this work. We need to know and to understand why we are here. While I am a part of government, I am not of government. And while I am a part of the system, I am not of the system. I come to my work from grassroots, community-based movements. One of the many reasons that I became more deeply and directly involved with our political process is reflected in the words of my dear friend, Bob Wing: "If we fail to place fighting electoral racism at the very top of a racial justice agenda, people of color will continue to be effectively disenfranchised."

I wanted to be in a position to push back on that trend because the only way that we are going to affect the kind of change that makes our movements unnecessary is if we elect to office the people who are cut from our cloth. So, I know why I am here. Why are you here?

2. Push back. While at Kentucky Jobs with Justice and the National Conference for Community and Justice, I would often question why so much of our time had to go to the mundane task of asking for money. It took me some time to begin to see the tangible difference that we were making through fundraising. Eventually, I shifted my thinking to accept the reality that our money-raising really was supporting our advocacy and public policy work. This became especially clear when I would sit down with immigrant workers who shared their stories of being able to finally join a union because of our support, or with a former felon who wanted to regain her right to vote and I connected her to the resources to make that happen. When those same individuals would donate to Kentucky Jobs with Justice, it taught me the lesson that every gift has value.

3. Fundraising is organizing, and organizing is building power. When we talk about moving from protest movements to policy change, that takes money. When we talk about building

a base of educated, informed and involved grassroots activists, that takes money. We need money for the buses and vans to transport our folks to state capitals, we need money to pay our childcare providers, we need money for the flyers, mailings, and phone banks.

4. Heal those wounds around money. Before we can raise more money and build more of a base, we have some healing to do around money. While we are turning challenges into opportunities for our members, we also need to recognize that the financial sacrifice is real for many of the people that we serve, and often for ourselves. So, we heal, and then we look for opportunities to use fundraising to build power.

5. Have fun fundraising! At Kentucky Jobs with Justice, we engage our board, staff and allies in fundraising by inviting folks to donate their birthdays to our cause. Most people immediately say yes (even my son on his 16th birthday), and then they really get into setting a fundraising goal, writing the pitch, inviting friends to give, getting the donation updates, and posting periodic reminders. And they have fun in the process.

6. Take advantage of social networking tools, and remember to also keep it old school. Yes, use Facebook, Twitter, and Instagram, AND pick up the phone, knock on doors, etc.

7. Build relationships that build power. Build relationships across economic, racial, ethnic, gender, age, geographic, educational differences. In other words, move from being "diverse" to being "inclusive."

8. Have an inside-outside strategy. We often talk about the notion of an inside-outside strategy. Black Panther Party members in Knoxville, Tennessee put this strategy into action starting in the 1970s. They were strategic in having Black Panther Party members apply for positions at the University of Tennessee and other places where Black folks had been barred. They also had folks who stayed rooted in neighborhood work so that there was change being pushed on the outside and folks making it happen on the inside.

9. Connect fundraising to intersecting issues. Our fundraising builds power when we remember our brothers and sisters on reservations, our children with disabilities, our queer friends who commit suicide because of bullying, our African, Asian, and Latino youth who still have a DREAM, women who can actually make decisions about our ovaries for ourselves, former felons who still do not have the right to vote, our elders who feel forgotten, and our natural environment that is being destroyed. When we connect our issues, we raise more money and build stronger movements.

10. Pushing Onward With Everlasting Resistance. That is POWER in the words of Southern civil rights activist Anne Braden. What keeps me hopeful is seeing all of the big ideas that are taking shape on different fronts like electoral organizing. We are building POWER when we build bridges across community and resource stratifications and across lines of difference, both real and imagined. We are building power when we ask ourselves: Is our work intentional? Is it inclusive? Is our movement accessible—physically, culturally, geographically? Do people feel connected and involved?

At the end of the day, we must use the money that we raise to build strong, powerful movements that reflect the words of activist and organizer Grace Lee Boggs: "This is what the Movement does. It tells individuals that they are somebody, that they can make a difference. A movement creates hope, it empowers human beings, advances them to a new plateau of consciousness and self-consciousness, creativity and social responsibility."

Attica Woodson Scott is the District 1 representative to Louisville Metro Council and is the former coordinator of Kentucky Jobs with Justice.

WHAT IS OUR DEMAND?

By Kim Klein

Inequality is becoming more and more profound. When we look at the effects of inequality, we see some fascinating information, which public health activists Kate Pickett and Richard Wilkinson compiled in their book *The Spirit Level: Why Greater Equality Makes Societies Stronger*.

Pickett and Wilkinson looked at a number of serious social problems and asked why these problems were so much worse in some developed countries than others. Put more directly: why is the United States the leader among developed countries in infant mortality, homicide, prison rates, teen pregnancy, and substance abuse? The answer they arrived at after analyzing all the data they compiled is that the United States is also the leader in income inequality.

Picket and Wilkinson come to this stunning conclusion: "Economic growth, for so long the great engine of progress, has, in the rich countries, largely finished its work. Further improvements in the quality of life now depend on community and how we relate to each other."

The reality that economic progress has done its work requires sitting quietly for awhile in order to truly take it in. This is not a small insight; acting on it will require retooling how we think. What this means is that a person who earns, for example, $100,000 will not necessarily have a higher quality of life by earning $200,000. They won't live longer, be any less likely to be shot or to have a stroke, or to be an alcoholic. They would be better off moving to Finland, though.

A recent Christian Science Monitor reports, "The standard of living for American has fallen longer and more steeply over the past three years than at any time since the US government began recording it five decades ago." The quality of life for everyone in the United States is going down and will continue to do so.

For poor people—who we have more of every day—a drop in "quality of life" is disastrous or even fatal.

As a person who makes her living in the nonprofit sector, I now need to think about how to address pressing social problems without relying on any of the old ideas about economic growth, even the ones that were progressive. What kind of wealth will we need to create in a post-capitalist society, and how exactly will we pursue "a quality of life that depends on community and how we relate to each other"?

And as a fundraiser, I have to ask myself the question: "How will this affect fundraising?"

The great opportunity here is to examine some of the assumptions we have long made about fundraising and ask if they are still true.

Assumption One: We can raise the money we need for the work we do if we only have a good board, good staff, good infrastructure, and deep dedication to best practice.

That is not true. We will only raise the money we need when we have a fair and just tax structure. When we stop thinking that corporations are people and money is speech. When we change the government to really be of, by, and for the people.

We will only have that government when we have some deep and robust conversations about what should be funded publicly and what should be funded privately. I always ask my clients, "How do you think you should be funded?" I am amazed by how few have ever thought about it. They wonder, "How can we get money?" but they need to first wonder, "How should we get money?"

There is enough money in the United States for us to be the country we want, but that money has to be seriously redistributed. All nonprofits, whether they get government funding or not, must engage in discussions of tax policy.

Assumption Two: Conversation is not action.

Conversation comes from a Latin word, "Conversare," which means to turn—to turn together, to turn to one another, to face one another. This is what people do when they converse. This is action. We deeply believe that all of us have the right to an opinion, but nobody is going to form an opinion if they don't think anyone is ever going to ask them their opinion. And so we have a population that is, by and large, not engaged—less than 50 percent of people who can vote, actually do. About 50 percent of people who could volunteer actually do.

If we want people to be engaged, we need to have conversations. And who, really, has more conversations than people in fundraising? When we ask someone for money, we have their attention. If you really want people to be engaged, ask them for money. But think of the conversation itself as action. Stop measuring everything in dollars raised.

Assumption Three: Foundations should give more money to social justice organizations and that we, along with our allies in the foundation world, should pressure them to give more grants to our kind of work.

Organizations spend hours on this, working with the many progressive funders that exist now. We all work together, and we have convenings. The funders form affinity groups, and they have convenings. And then we do our best to be invited to these convenings.

But do the math: Last year, total foundation giving was almost $42 billion. Research shows that about 12 percent of that went to social justice—about $4.4 billion. $4.4 billion is a lot, right? Hardly. $4.4 billion is less than the amount of money the top 1 percent saved in one month from the Bush tax cuts that were extended by Obama. Even if all $42 billion of foundation funding were to go to social justice, it would not turn this country around. The Super PAC Restore our Future, which supports Mitt Romney, has spent almost $62 billion this year alone.

What we have that the top one percent doesn't have is numbers of people. The money is in people—lots of people. So stop waiting for foundations to become something else. Work with those who get funded to do good work. But spend most of your time where most of the money is—with people.

In a world where economic progress is no longer important, what all of us need to learn and practice is how we relate to each other and how we build community—skills we grassroots activists already have. We know how to take care of each other and how to share ideas and share space. But we have forgotten some of this in our efforts to brand ourselves, be professional, and create deliverables and outcomes. We need to stop looking at our dashboard and start looking at each other. ■

Kim Klein is the founder and publisher emerita of the *Journal*.

The Quest to Understand Your Donors:

A New Approach to Evaluation

By Miguel Gavaldón

YOU KNOW WHAT I LOVE about donors? Unlike foundations and government agencies, donors are not required to award grants and contracts. Unlike partner organizations and staff, donors are not compelled to stick it out with your organization out of self-interest or job security. Why would someone, at any monetary level, voluntarily hand over money to your organization? Begin your evaluation journey with this key question in mind, in your heart, and in your gut.

If you buy the adage, "people give money to people," then approach your individual donor program evaluation the same way. Try not thinking so much about fundraising strategies and activities at first. Try not thinking so much about whether or not you met your target revenue amounts—you'll deal with that soon enough. Rather, try getting inside the hearts and minds of your biggest fans and fans-to-be.

TRY GETTING INSIDE THE HEARTS AND MINDS OF YOUR BIGGEST FANS AND FANS-TO-BE.

Let's look at the "Individual Donor Motivation Chart":

Column A—Gift Level: Organize your donors and donor prospects into four general groups that best represent their giving range. As you review your four groups, construct stories of motivation. In my experience, the stories tend to unfold at the following gift levels: $50,000, $10,000, $1,000, and $100. What of the $20,000 or $500 donors? I may intuitively group them with a higher or lower gift level, or I may leave them aside until later in the exercise. Whatever you do, don't lose yourself in the details yet, let the overarching stories emerge. Are these dollar amounts too high for your organization at the present time? Just remove a zero from each of them for a gift range of $5,000 to $10.

Column B—Motivation: For each gift level, brainstorm the motivations of these donors. Don't stare at names, pick some people and contemplate them. Pick some you think you know well, pick some to research online, pick some who others can tell you about. Recall what these donors have shared with you over time. Reflect on your observations about how they live their life, beyond work or your shared social justice causes. How does all of this inform their motivation to support your organization? Share your reflections with others and get feedback, especially if they know some of the donors. You can even ask some donors directly. If you do choose to ask donors, I recommend starting with actual conversations as opposed to online surveys. Don't count on SurveyMonkey to gather thoughtful responses.

Each person's motivation may be unique, but in order for your evaluation to offer guiding points for your next fundraising plan, you need to generalize a bit. Consolidate various motivations under a handful of descriptive labels. I encourage you to craft your own la-

bels. If you get stuck, try the classic framework of categorizing your donors as "thoughtful," "habitual," "transactional," and "impulsive."

Once you have the labels that work for you, assess the donors in each of your gift levels. Look for unexpected similarities and critical differences, both within each gift level and across the various gift levels. Make informed guesses as to what transforms, for example, a previously $100-donor into a $1,000-donor. For each gift level, come up with one critical question that will inform your fundraising plan moving forward.

Column C—Identification of Donor Prospects: How did you know who to ask for that particular gift level? On the sample chart, you will note that I considered donors with a giving history of $10,000 gifts as prospects for $50,000 solicitations. That doesn't mean I expect most of them to give at that level, but in my view that does give the green light to ask. I have heard fundraising experts suggest that donors may have the capacity to give ten times the amount of their initial gift. For each gift level, come up with one critical question that will inform your ask amounts moving forward.

Column D—Strategies Used: Which fundraising strategies did you employ for each gift level? Moving forward, do these strategies correspond with what you know about your donors' motivations? For example, as many fundraisers will testify, face-to-face asks are by far the most effective. Organizations tend to reserve the face-to-face strategy for their top-end donors. Is that the most effective use of this strategy? Could the time you spend trying to chase down half of your top-end donor prospects for personal visits, which they may not need or want anyway, be better spent? How about investing some face time with those mid-level donors who would truly appreciate a personal visit?

Column E—Prospects Asked: How many people were personally asked for this specific gift amount? Having a reply card listing a range of dollar amounts does not count. Face-to-face and group solicitations need to be made with specific dollar amounts. Appeals to your broad audience (via direct mail, email, & phone-banking) should also have a specific ask conveyed in a personalized manner such as a personal handwritten note that goes along with that direct mail appeal. This is how you get your donors to stretch their giving—this is how you make them feel like they are investing in important work. If it is impossible to give all of your prospects a personal touch, at least start with a handful. Note how many prospects got the personal touch.

Column F—Actual Donors: This is a great number to see alongside "Prospects Asked." Typically, it takes a great deal of asking to build and sustain your donor base. These numbers often serve as a reality check for both evaluating and planning individual donor campaigns.

Column G—Total Raised: Yet another reality check. Was your investment in human resources (staff, board, and/or volunteers) to implement the strategies at each gift level worth it? Was your investment in direct costs (design, printing, event expenses, etc.) worth it? Again, don't stop at fundraising strategies, apply that cost-benefit question all the way to the donors you imagined at the beginning of this exercise. For example, that printed newsletter you invested a few thousand dollars in may have been a loss as a stand-alone fundraising strategy. But if several of your top-end donors mention appreciating receiving that mailing, that newsletter may well have primed them for the face-to-face asks which came shortly thereafter.

Moving Forward: Begin with the intention of understanding your donors, then follow up with the math. The traditional approach to evaluation consists of segmenting out each fundraising strategy, the dollars invested for each strategy, and then the net dollars earned from each strategy (see sidebar of additional articles to help you with this type of evaluation). This approach has great value so long as the personal motivations of your donors keep company with your numbers-crunching.

Evaluating your individual donor program holistically will not only improve your next fundraising plan, but it will also inform your community-building strategies (i.e. marketing, communications) and who you should recruit next time to join your fundraising team. Understanding your donors better will lead to a greater understanding of who would be most effective at asking them for support.

We can choose to view fundraising as an unforgiving chore necessary for survival, or we can choose to view fundraising as a craft that teaches connection. ■

Miguel Gavaldón is a fundraising and nonprofit leadership coach, trainer and consultant. He builds the confidence of fundraisers and helps develop strategies in sync with each organization's culture and strategic position: miguelgavaldon.com.

Read More about Fundraising Evaluation

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- *Evaluating Your Individual Donor Program* by Stephanie Roth
- *How's the Program Working? Using Benchmarks to Evaluate Your Performance Online* by Nzinga Koné-Miller
- *Shaping the Future: Fundraising Evaluation to Build Capacity & Involvement* by Judy Levine

Individual Donor Motivation Chart
SAMPLE

COLUMN A **Gift Level**	COLUMN B **Motivation**	COLUMN C **Identification of Donor Prospects**
$50,000	All prospects are **thoughtful** donors. My organization is likely one of their favorite causes. When they are solicited, they seem to always say, "I need to get back to you" because the amount we ask is significant to them. They place high value on our organization's leadership. ***Moving forward—***How do we sustain thoughtful donors?	• Existing donors who have given at least two gifts of $10,000+ over the past several years • Your organization's contacts who have given $10,000+ to other organizations • Contacts your board, staff or volunteers believe have the capacity to give $10,000+ ***Moving forward—***Was the ask amount appropriate for these donor prospects, given that they are thoughtful donors?
$10,000	A number of **thoughtful** donors, as described above, reside at this level as well. An even larger number of **habitual** donors appear to keep our organization on a relatively short list of groups they give to year in, year out. We have the hardest time getting them to give at higher levels. Some of these donors may view their gifts as **transactional**—as a way to thank our organization for something specific we did that year. Some of these donors may also see contributing at this level as a way of gaining prestige with our shared constituency. ***Moving forward—***How do we elevate habitual and transactional donors into thoughtful donors?	• Existing donors who have given at least two gifts of $1,000+ over the past several years • Your organization's contacts who have given $1,000+ to other organizations • Contacts your board, staff or volunteers believe have the capacity to give $1,000+ ***Moving forward—***Given that this gift level is populated by three different types of donors, do we need ask for different amounts from each?
$1,000	We still find **thoughtful**, **habitual**, and **transactional** donors in this level as described above. We give some extra personalized attention to major donors, with "major" beginning at the $1,000-level. A number of donors at this level appear pleasantly surprised that we treat them like major donors. This may contribute to their motivation to continue at this level. ***Moving forward—***How can we make donors contributing less than $1,000 feel special as well?	• Existing donors who have given at least two gifts of $200+ over the past several years • Your organization's contacts who have given $200+ to other organizations • Contacts your board, staff or volunteers believe have the capacity to give $200+ ***Moving forward—***Does asking for a larger gift contribute to that donor feeling like a special constituent?
$100	Given what we perceive as limited capacity for some of our constituents, a $100 gift is **thoughtful**. We also find **habitual** donors who appear to give around this level to several organizations. The majority at this level are **impulse** donors. Most of them likely gave because (a) s/he has been a fan of the organization for some time, and this is the first time s/he is being asked; or (b) s/he knows the person who wrote the personal note on the direct mail appeal or made the phone call. ***Moving forward—***How do we strengthen the connection impulse donors feel with the organization?	• Lapsed donors • Your organization's contacts • Contacts offered by your board, staff or volunteers ***Moving forward—***If the main goal is to strengthen our connection with impulse donors, what would be the most effective ask amount(s)?

	COLUMN D **Strategies Used**	COLUMN E **Prospects Asked**	COLUMN F **Actual Donors**	COLUMN G **Total Raised**
	Face-to-face Strategy **Event Strategy** Additional prospects not asked at this time were placed on a short list of people to invite to events.	**10** Face-to-face solicitations	**1**	**$50,000** Raised at this level
	Face-to-face Strategy **Event Strategy** Additional prospects not asked at this time were placed on a short list of people to invite to events.	**40** Face-to-face solicitations	**5**	**$50,000** Raised at this level
	Face-to-face Strategy **Event Strategy** Two fundraising events were held with 50 guests at each. Between both events, 100 guests experienced a group solicitation and gave as follows: • 10 gave or pledged $1,000 • 20 gave or pledged $100 • 40 gave at lower amounts • 30 did not give	**50** Face-to-face solicitations **100** Solicited as a group at events	**20** 10 gave as a result of face-to-face asks 10 gave as a result of the fundraising events	**$20,000** Raised at this level
	Event Strategy *Same as above* **Direct mail appeal, E-appeal, Phone-bank Strategies** • 50 prospects gave or pledged $100 • 50 prospects gave at lower amounts • 200 prospects did not give These strategies complemented our face-to-face and event strategies as well by (a) planting the seed for solicitations; and (b) reminding prospects to follow-up on pledges.	**100** Solicited as a group at events (duplicate number for gift level above) **300** Individuals were solicited by direct mail, email and phone-banking	**50** 20 gave as a result of the fundraising events An additional 30 gave as a result of direct mail, email, and/or phone-banking	**$5,000** Raised at this level
	THE BOTTOM LINE	**500 total prospects**	**76 total donors** giving at least $100 each	**$125,000 total raised**

The Fundraising Summit

Creating a Shared Vision

By Ari Wohlfeiler

PHOTO COURTESY OF JVP

JVP members gather for a Northwest Leadership Development Institute, January 2012.

BUILDING A STRONG ORGANIZATION requires balancing a collective responsibility for fundraising, with trust in a team of fundraising leaders (be they staff, board or volunteers) who bottom-line those efforts.

What is the best way to find that balance where everyone's work supports development goals without having too many cooks in the kitchen? We are all, unfortunately, probably familiar with the "All Hands on Deck" mode—moments of crisis where everyone drops everything to keep the doors open. While it may sometimes feel necessary, it is hardly a sustainable way to implement a coherent development vision.

How can we effectively create and hone a development strategy outside of crisis? Last May, Jewish Voice for Peace (JVP) organized a fundraising summit to do just that: fine-tune our fundraising program as we attempted to grow.

Where We Started

JVP is a national grassroots organization dedicated to working for social justice, equality, human rights, and respect for international law as a way forward for all Palestinians and Israelis. JVP members focus specifically on the special role US Jews can and must play in advocating for a shift in US policy toward Israel and Palestine, and to disrupt the assumption that criticism of Israeli policies is inherently anti-Semitic.

Out of political necessity, JVP has built up a strong grassroots fundraising program over the last ten years. Until last year, JVP did not have full-time staff dedicated to fundraising. Instead, staff and volunteers shared tasks, which helped strengthen JVP's fundraising program by incorporating a broad base of volunteers from day one, and by eliminating any artificial barrier between fundraising and program work.

For nearly ten years, our basic approach worked well. We raised 95 percent of our budget from individual donors; integrated a strong mix of on- and offline fundraising campaigns; cultivated a large, dedicated, and well-coordinated fundraising team; and grew our income to allow the organization's programs and membership to thrive and expand, even after the 2008 recession. However, in 2011, our income hit a plateau for the first time.

The good news, and the puzzle, was that our donors and members were not fading away. In many ways, they were more energetic and excited than ever before. Our organizing and communications programs were building more traction in the communities where we work, including our communities of donors. Political developments in the US, Israel, and Palestine all pointed to an expanding, not contracting, role for JVP in the coming years.

Our initial diagnosis of our fundraising program, then, was a major case of growing pains. For example, our leadership no longer knew every major donor personally. Our donor lists had gotten big enough to require a degree of segmentation we had not attempted yet. Our email traffic was getting congested between so many fundraising, campaign, regional, and membership-building messages.

Fresh Eyes

Headed into 2012, we knew we wanted to do more than head off a decline—we wanted to get back to a growth trajectory. So we decided to invest in a formal audit of our fundraising program. We hired a consultant to look at what we were doing, dig into our systems and history, and come up with some recommendations to keep us growing.

Our consultant pored over donor data, interviewed every staff and volunteer member on the fundraising team, as well as a sampling of program staff, board members, and donors. The audit report she wrote included too many recommendations to implement right away. It gave us a series of choices, not a to-do list. We recognized that whatever we chose would have implications for our programmatic work, so we needed to reach some consensus across the organization to set a course everyone could support.

Meanwhile, we had also set our budget for the upcoming fiscal year with an ambitious 12 percent projected budget increase. This self-imposed challenge piqued our interest in finding the "low-hanging fruit" first: we wanted to improve our fundraising in ways that could bring in new money quickly, but also be the building blocks of long-term growth.

Getting Together

We decided to talk face-to-face about these choices. We needed

something more than just a long fundraising team meeting, but more directed than a fundraising workshop for the organization as a whole.

We were lucky to have a board and staff retreat coming up. We quickly tacked on an extra day and invited a broad swath of 13 JVP leaders: fundraising staff, program staff, board members, and core volunteers alike.

Our goal for the day was to identify strategic principles and broad benchmarks that we could commit to for the next year. We did not want to talk about implementation. The fundraising team could figure that out as long as we ensured that the organization as a whole was working in sync with the basic strategy.

The Summit Begins

We started the day reviewing the principles underlying our fundraising program, and the highlights (and lowlights) of our history. Because we had all already read the audit, we were able to start from a shared understanding and move quickly into strategy.

Then we laid out several donor segments by giving levels, history as donors, and other relationships with the organization and our movement. We shared data about how many donors were in each segment, how much of our income they were currently responsible for, and how they overlapped.

Then we talked about who these people were. Longtime solicitors shared examples about who our donors were and what they cared about. Organizing staff talked about their relationships with donor-activists, showing us similarities and differences in how we encountered the same people in either fundraising or activist contexts. We brainstormed composite images of certain donors ("Our most loyal donors tends to be over 40 and have worked with us before…"), and raised questions we all wanted to chew over ("how many JVP donors aren't Jewish?").

Choosing Our Focus

After lunch, we worked on the fundamental question: which two segments did we want to focus on for the next year? From our different perspectives, we discussed where we thought additional income could come from in the next year. How could we build stronger relationship with people in different segments or recruit more people to them? What would the long-term consequences be?

The main challenge was the act of choosing itself. It is easy to see how all donors need attention and could bring more money and power into an organization with that attention. It is easy to list all the things we want to do over the next five years. Deciding to prioritize two donor segments for this year, though, meant not prioritizing (as distinct from de-prioritizing) the others. Essentially, we were debating our theories about how JVP would build power, and learning to trust our prediction about how to grow without trying to do it all.

In the end, we chose major donors as one segment to focus on. We had run a major donor program for many years, so we already had a lot of information about who they were and what did and didn't work.

For our second segment, we decided to choose a measurement instead: retention. We already knew from the audit that our retention rates could be improved, but we didn't know too much else. Should we be focusing on retaining new donors? Donors who had given for two to three years? Building rock-solid, life-long relationships with the donors who had already shown us the most loyalty? What even were the "right" retention rates for our donors?

We chose this area of focus in part because even trying to answer those questions would give us a stronger sense of direction. We were also attracted to a focus that cut across all levels of giving —making sure that we didn't simply think about donors in terms of the size of their gifts, but in terms of how they experienced being JVP donors.

Armed with a commitment to prioritizing major donors and retention rates, we broke into small groups for the last section of the day and brainstormed as many ways as we could think of to do these things. These brainstorms are the real tools that the fundraising team has turned to since the summit to figure out the guts of our fundraising plan for the year.

Last but not least, we asked the participants who had the longest histories fundraising with JVP to share their "pearls of wisdom" in the group. By honoring the expertise in the room, we also took responsibility for passing on organizational history and respecting the ability of newer JVP fundraisers to step up.

What We Left With

The summit didn't leave us with a detailed fundraising plan, money in the bank, or new names on our list. But we created a strong sense of shared direction, which already has proven invaluable. We did not lack fundraising ideas before the summit, which was part of our challenge. We made ourselves choose a more narrow focus, and in doing so, set ourselves up to make measurable improvements in those two areas.

The summit didn't end with people making new commitments to raise money. Instead, we left the fundraising team with the assurance that everyone in organization as a whole knew where we were going. Rather than an unrealistic commitment for "everyone to prioritize fundraising," we left with a strategic vision for how all our work would fit together to move us closer to our organizational goals.

What Made It Successful

While it is too early to measure what the long-term impact of this summit on JVP's program, here are some of the factors that we think made it successful:

Investing in an outside consultant. This not only brought a fresh perspective and neutral sounding board to our program, but allowed everyone on the fundraising team to fully participate.

Bringing a large group together to strategize. The perspectives of our organizing staff and volunteer solicitors were invaluable. We also avoided the trap of simply asking program staff and volunteers to do more fundraising, and instead kept the focus on figuring out what the fundraising strategy should be.

Setting a clear, medium-term goal. Having clarity that we wanted to increase our income by a certain amount over a defined period of time was a huge help. It narrowed down the scope of change we considered and helped us think in terms of programmatic plans over the same period. It kept us in the realm of how, not if or why.

Building a commitment to evaluation and data. The summit pushed us toward using more data, including more hard numbers in addition to our existing wealth of anecdotal and historic information. For example, the audit pointed out that nearly 25 percent of our income came from a group of loyal donors who had given to JVP for at least five years. This completely new nugget of information helped us think about building and retaining donor relationships in new ways.

Conclusion

Whatever the mechanism, it is always important to figure out how people who aren't responsible for the day-to-day work of fundraising can play an integral role in devising fundraising strategy. Knowing where we are all going together is essential to empowering fundraising leadership to help the organization get there financially. As our deputy director, Cecilie Surasky, stated, "The fundraising summit allowed us to re-ground ourselves in this fundamental principle that fundraising is inseparable from activism, and that every one of us in the room, no matter our job title or experience, has a huge amount to offer." ■

Ari Wohlfeiler is the grassroots fundraising coordinator at Jewish Voice for Peace. He is also a member of Critical Resistance and a volunteer with Californians United for a Responsible Budget.

SYPP supporters at the 2011 FamBam

Breaking with Tradition

From the Auction to the FamBam!

An Interview with Sunny Kim and Jeremy Louzao by Yasmeen Perez

SEATTLE IS A CITY known for having the highest number of fundraising auctions per capita in the country. Over 400 charity auctions take place each year throughout the Puget Sound area.

So it is not surprising that for Seattle Young People's Project (SYPP), a 20 year-old youth organizing group, an auction was a key part of its annual grassroots fundraising strategy since it was founded in 1992.

But a few years ago, after nearly 18 years, SYPP's auction was losing steam. Youth members were uninspired by the "dinner + program + silent and live auction" formula. Many of SYPP's constituents and community members, primarily low-income youth and people of color, felt disempowered by the consumerist model of auctions and politically conflicted about replicating an event that historically served to buy and sell women and enslaved Africans. The board and staff were experiencing auction fatigue, and the whole organization began questioning if it was time to leave the auction behind.

Don't get me wrong—auctions can be effective fundraising events. And the formula of a sit down dinner with an entertaining program and silent and live auctions have endured for years and will continue to do so. SYPP's auction had long been a successful fundraiser, grossing over $25,000 a year and attempting to have a youth-centered vibe with an array of auction items that were affordable to youth members and their families. But despite the money it raised and the intentions put into the event, SYPP felt the growing concerns about the auction were too important to ignore.

Taking the leap to break with tradition was harder than it sounded. As an ally and former staff member of SYPP, I witnessed how SYPP's board, staff, and members engaged in a thoughtful process and took careful steps to communicate with different stakeholders, get the opinions of trusted allies and former leaders, and solicit community input on what to do about the auction.

In our interview below, Sunny Kim (SYPP's current co-director) and Jeremy Louzao (SYPP's former co-director) share the process that SYPP went through to determine if and how they should retire the auction and the best practices and lessons they learned along the way.

YP: When did you know that the auction wasn't working? What dynamics did you evaluate?

Jeremy: The first thing that triggered introspection was the passing of SYPP's historical auctioneer, Larry Taylor. Larry was an auctioneer who was deeply tied to the community, he was an alumnus of one of the high schools that many SYPP members attend, and he genuinely seemed to understand and believe in what we do at SYPP. When he passed, SYPP tried working with a variety of different auctioneers year after year, but none of them had those same ties to the communities of color where SYPP organizes. Their focus was much more on simply maximizing dollars for the organization.

When the process of working with auctioneers got to that point of sort of mechanically figuring out how to squeeze as many dollars out of our supporters as possible, that's when we started to really see that all was not right. In informal and formal debriefs, youth also expressed feelings of being tokenized as they stood

next to items or told emotional stories with the express purpose of upping the fundraising amounts. At one point, an auctioneer even suggested that we auction off "child labor" from our members as a joke auction item, and that went over pretty badly.

Also, procuring auction items required more than 3 months of intense door-to-door ground work from youth interns and staff. For an organization as small as ours, the auction was just a huge pull away from our youth organizing work.

Sunny: The last few years before deciding to leave the auction behind kept showing us signs that it was time to move on. The auction felt stifling and at odds with SYPP's youth-led mission. Our majority youth board and adult staff members acknowledged that the auction had become too mired in its own history. Also, the singular focus on purchasing products left little room for celebrating the work of youth organizers and for celebrating the community that supports us.

YP: What was the organizational process to assess whether or not to keep the auction? How were members, staff, board, and allies involved?

Sunny: We had layers of conversation among members, staff, board and alumni. While evaluating the auction of 2010, staff and youth interns realized that the criticisms of the event had been brought up before with little done to address them. While debriefing with the board of directors, the possibility of leaving the auction behind was raised and evaluated. We compared the cost to SYPP to hold this event and compared it to projections of what we could raise with a fundraising event that wasn't driven by selling items. We also discussed how this would fit in with our larger fundraising strategy and whether our community would be receptive to this change. Throughout this process, youth members and staff were fully engaged. Prior to publicly announcing this, we reached out to a handful of strong supporters to solicit their feedback.

Jeremy: We had a special meeting of SYPP members and adult allies to discuss the pros and cons and to run numbers. Then it came to a vote at the youth-driven board meeting, and it was unanimous in favor of moving away from the auction.

YP: What did you replace the auction with? Why did you decide to try something new versus just alter the auction event? How was the idea of the FamBam born?

Sunny: We replaced the auction with the FamBam, which is all about building connection between supporters, youth, and their families. It's a creative and unique celebration of how all generations contribute to social change, from our ancestors, to our supporters and alumni, to our current members.

> **fam·i·ly** [**fam-uh-lee, fam-lee**] noun + bam [bam] noun, verb = Fam·Bam
>
> 1. noun: a night of sharing, storytelling, eating and laughter with old and new friends. ex. *I can't wait to go to the fambam tonight so I can eat till I burst and laugh till I cry!*
>
> 2. verb: to bring communities together to celebrate the accomplishments of youth organizers with families, community and SYPP supporters. ex. *I'm glad we fambam'd last night. I learned so much about everyone there!*

Jeremy: The FamBam was born out of a youth-led planning meeting, and the actual name started as just a joking suggestion from Lyndsey, a high school senior. But we all loved it, and the name stuck.

The overall idea came out of our values. What we loved about SYPP's past auctions was that it was an annual community event where we could report back to our supporters and include them in our organizing and our politics. But it was always overshadowed by the consumerist elements of the auctions—especially in the amount of prep time that item procurement got versus the actual planning of our program.

So, we decided that instead we wanted to have an event that had a fun, warm community celebration vibe but kept our actual politics and organizing front and center.

Sunny: We actually started off with a big brainstorm to figure out what kind of fundraising event would be able to fill a hole that would be left by the auction. The idea that spoke the most to all of us was an event centered on engaging youth members, their families, and the SYPP community. We saw it as a chance not just to celebrate the youth members, but as a way of building community and growing our family.

YP: How did you communicate the change to the community? What was their reaction?

Sunny: We sent out a letter along with our annual report that asked our community of supporters to leap with us as we made

this change. After sending out our intentions, there were many in the community who thanked us for naming consumer driven capitalism and the dynamic it plays. There were others who thanked us from their positions within other nonprofits who appreciated the thought and intention behind our shift and our dedication to the mission of our organization. Some of those people told us that they shared our letter with their directors and their boards.

Jeremy: A few people said that they would miss the good deals they got from the auction, but the overall response was resoundingly positive. I was personally blown away by how supportive people were. And they backed that support up with their dollars, as well.

YP: What has the impact been since starting the FamBam?

Jeremy: The impact has been very positive. It created a lot of energy and goodwill with adult supporters, and brought in more volunteers. Most importantly, now that we didn't have to do item procurement, we were able to push our campaign work farther than we had in years. The youth also had a lot more fun because they were the MCs, instead of having an auctioneer.

Sunny: In its first year (2011), the FamBam netted the same profit as the auction and shows potential for more growth as it becomes an established event. The impact that matters more to us can be seen in how organizers and attendees engage with each other and with the event. People who attend have told us how much more fun they have, how much they learn about our work and how much they look forward to attending next year.

YP: What best practices would you suggest around the process of evaluating and retiring a fundraising event?

Jeremy:

1) Go back to your mission and values. How does the actual process of organizing your fundraiser contribute to building your mission, or does it distract from your mission? If it feels like a necessary evil, then the event probably needs to be retired or retooled.

2) Involve your community in the decision as much as possible. Openly discuss all the pros and cons. Brainstorm as many different options as possible. Play around with a lot of numbers and projections, and let your supporters and board members play with those numbers, too. This kind of collective, collaborative process really helps bring out a lot of creativity. Further, it generates positive energy about the new thing that you are creating, rather than fixating on the negatives of the thing that you're leaving behind.

3) Maintain a rigorous process of debrief and reflection. One reason why many organizations stick with the same old fundraising events year after year is because it's just easier to keep following a tradition, even if it's not quite working. Whether creating a new type of event or continuing an older event, organizations really should have a critical eye on what they are doing each year. I think this is something that we lacked after each auction because we were so relieved to just have it done each year. I think we continue to run this risk with the FamBam—who says we need the same type of FamBam each year? How can we keep the creativity going each year? The planning process needs to continue being dynamic so we don't get stuck in a rut.

Sunny:

1) Weigh the human and mission-based costs along with the financial cost when evaluating your fundraising event. Ask yourselves: Does this help build our community? Does this support the growth and leadership of our members? Does this still feel fun? What do we lose by trying? What can we gain?

2) Engage as many leaders within your organization as possible in evaluating every year's event. In all likelihood, if you're thinking of retiring an event it is because it has been a long time coming. Be diligent in collecting and responding to feedback and be willing to engage broader conversations about how things are done and why they're done.

YP: Any last thoughts you think are important to share?

Sunny: Trust that your people will be there with you. The people who support your work are there for you because they believe in what you're doing, not because of the type of fundraiser you're holding. While you learn what works best, ask for their help and support.

Jeremy: We need our fundraising to contribute to our movement-building and community empowerment work, or else it's draining vital energy and creativity from where it should be channeled. It was hard to start making this change at SYPP, but with the FamBam, we at least took a step in that direction, and it's something I'm really proud of as a former co-director. ■

Yasmeen Perez is the development director at Right to the City Alliance and a proud member alumna and former co-director of SYPP. For more information on Seattle Young People's Project, visit sypp .org.

Dear SYPP alumni and supporters,

Seattle Young People's Project is about to make a heartfelt, but risky change to our fundraising strategy, and we're counting on your support to pull it off.

After extensive discussions among members, staff, some alumni, and the Board of Directors, we have decided to discontinue our annual auction fundraiser. Instead, we are excited to pursue some new fundraising ideas that better reflect our values and capacity. Please, read on to hear about our reasons, our plans, and how you can help us take this bold step.

Saying Goodbye to the Auction

Year after year, SYPP has been able to pull off auction fundraisers that are warm, fun, and also sustain our youth-led organizing work. In fact, last year was our most financially successful auction yet, raising almost $27,000. However, there are a number of things about the auction that just don't sit right with us, and don't feel like a good fit with our mission.

For example:

- Youth members often feel tokenized, standing behind products and on stage for just a few minutes to ask for money. For all the work this event takes, they want an opportunity for more authentic interactions with their supporters.
- As a social justice organization, critical of cut-throat capitalism, we feel sad to have our biggest event of the year so focused on consumerism. In fact, many youth's own families and communities feel priced out of the event. We want to connect with you about our work, not about buying things.
- With only two staff and two youth interns, the auction monopolizes almost 3 full months of SYPP's capacity. This is time that can and should be better used to push our organizing forward and to grow youth power in Seattle. If we are going to spend three months going door-to-door across Seattle, we want to be asking our neighbors to build a movement, not just donate gift certificates.
- Just as we've seen more and more organizations borrowing the fun Bowl-a-Thon model, it seems that every year more local groups are doing auctions. In fact, Seattle has an incredibly auction-heavy fundraising climate compared to other cities. At SYPP, we think it's time to try something different.
- While we loved professional auctioneer Laura Michalek's work last year, ever since our long-time auctioneer Larry Taylor passed, the SYPP auction just hasn't felt the same to us.

For these reasons and more, SYPP is looking to change things up.

3 SYPP Values, 3 New Initiatives

This year we are launching three new fundraising and community building programs that are rooted in values that matter to us at SYPP:

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1) Building an intergenerational community that honors youth's justice work.

SYPP FamBam!
A Dinner and Celebration of the SYPP Family
-Saturday, May 21st, 5:30-8pm-
This dinner will gather SYPP's entire community of members, supporters, alumni, and parents to celebrate together as a SYPP family. Like the auction, there will be giving opportunities like fund-a-need and the dessert dash, but the focus will be on having fun, meaningful sharing about SYPP's work, and honoring each generation's contributions to building social change movements. GOAL: $10,000

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2) Appreciating SYPP's legacy and listening to those who come before us.

SYPP Alumni Story Project and Giving Circle
With SYPP coming up on its 20th birthday, there are hundreds, if not thousands of community members who count SYPP as one of their first activist homes. We are creating a project to reconnect with these SYPP history makers, to learn from their stories, and to seek their support to sustain SYPP into the future. GOAL: $2,5000

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3) Expanding class-accessible fundraising that values people's time contributions and relationships

Major Fundraiser Program
While we love our Major Donors and appreciate their sizeable annual contributions, we also want to expand spaces for supporters who might not have deep pockets, but who do have deep commitments to youth empowerment. We are recruiting 10 major fundraisers, who will utilize their own passions and chosen communities to raise $1,000 over a 12 month period. GOAL: $10,000

SYPP NEEDS YOU!

This change in our fundraising is much less about the money, and more about sticking to our values. But that doesn't change the harsh economic realities out there.

In order to make this risk work out, we need our SYPP community to show up for us. We still need captains for the SYPP FamBam!, we need alumni to reconnect with us, and we need Major Fundraisers.

What will your contribution be?

Thank You,
SYPP's Board and Staff

Thank You to Our Donors!

June 2009-May 2010

Donors ($1-$249)

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