

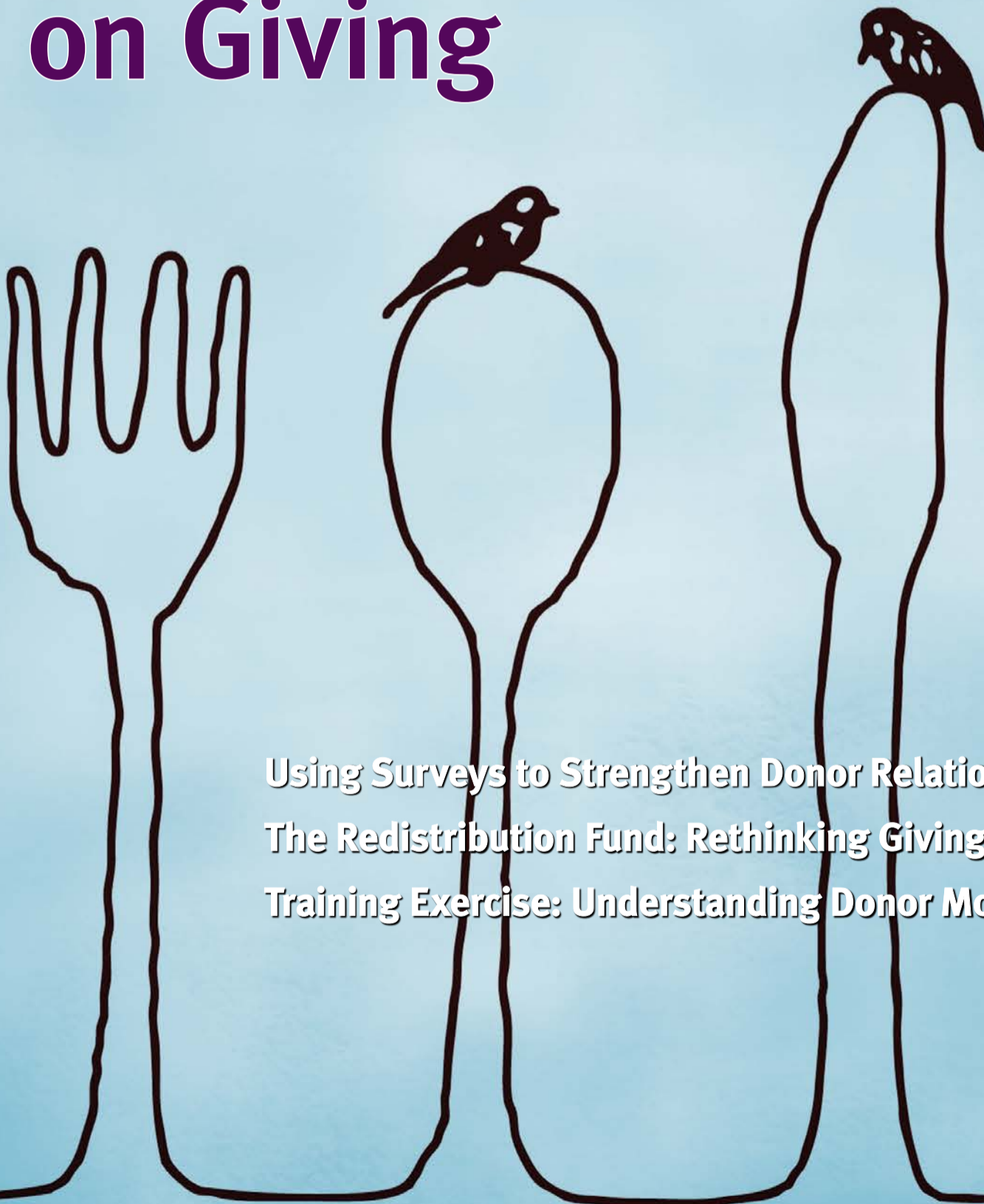
# Grassroots Fundraising Journal

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A PUBLICATION OF



## Donor Perspectives on Giving



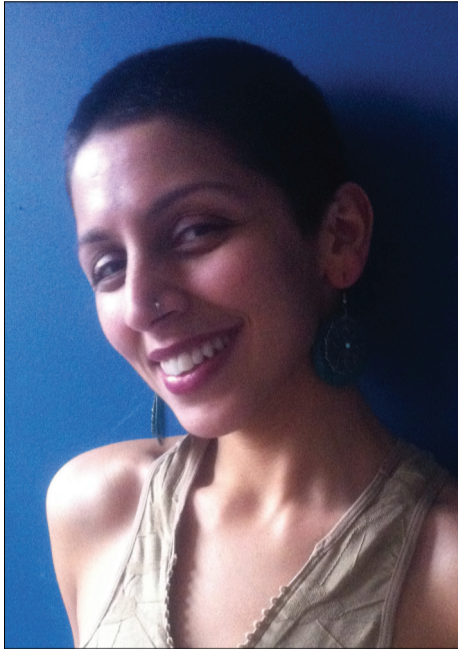
**Using Surveys to Strengthen Donor Relationships**

**The Redistribution Fund: Rethinking Giving**

**Training Exercise: Understanding Donor Motivations**

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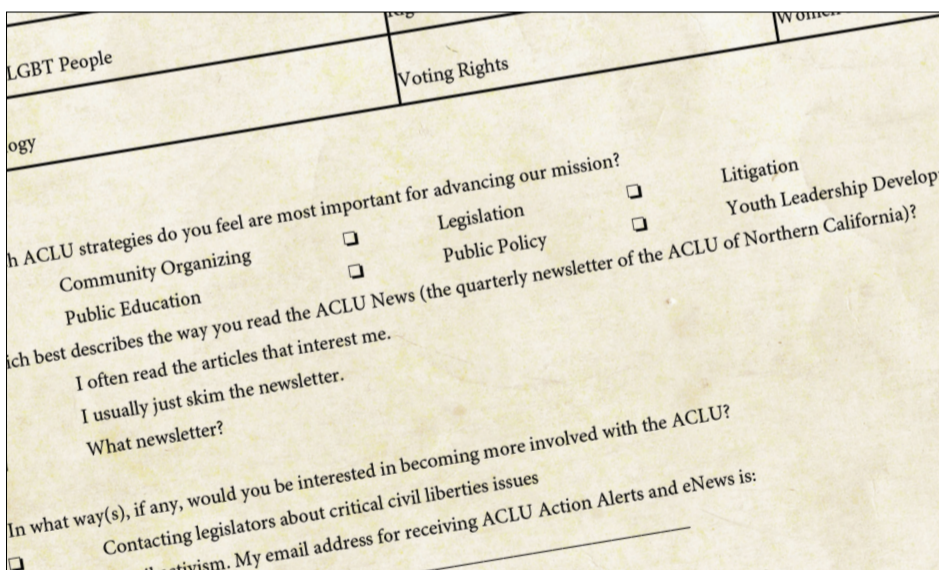
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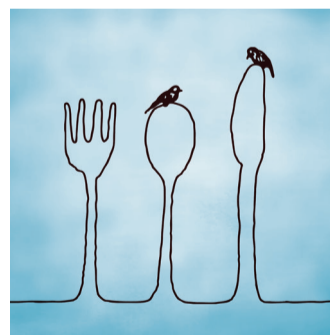
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### On Our Cover

Our cover image is the Redistribution Fund logo, and was created by Fund collective members to represent how they see their work: that resource sharing is about nurturing each other in our communities, about building relationships and honoring life. They chose the metaphor of sharing food with others as a way to represent the practice of redistribution.

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## Strengthening Relationships with Our Supporters

By Ryan Li Dahlstrom

**HAPPY MAY DAY** and International Workers Day! As many of us are in the streets celebrating and honoring the historic Haymarket affair and the organizing that led to the eight hour work day, we also recognize how much further we still need to go in order for all of our communities to thrive.

Living in a racialized economic system that values profit over people has a disproportionate impact on marginalized communities (particularly communities of color) who have struggled with poverty for generations. And, with inequitable wealth and resource distribution at its most extreme, we need each other now more than ever.

So how can we translate these realities into building stronger and more sustainable movements for liberation? How can the way we resource our movements support more interdependence, resource sharing and collaboration? How can our relationships with our supporters reflect the values and politics we prioritize in our work?

In the spirit of building interdependent relationships, this issue of the *Journal* focuses on donor relationships and perspectives. How is it that people become donors? What are the values that guide donors' giving practices? How can we better get to know the folks who are already supporting our work and form stronger relationships

with them? How might all of this lead us toward radically transforming the way we resource our movements and build relationships with each other?

First, three donors share their perspectives on giving and provide helpful insights for navigating the donor/fundraiser relationship. Stephanie Roth follows with an article focusing on how to use donor surveys to strengthen relationships with donors. Then, Stephanie Syd Yang shares her experience with the Redistribution Fund, a collective that is developing a new model for redistributing resources and supporting their communities. We round out the issue with a training exercise created by Uma Rao about understanding donor motivations, which you can use with your board, staff, and/or members. We hope you find these perspectives, new models, and tips useful and inspiring.

As always, please don't hesitate to be in touch with story ideas or feedback on other topics you would like to see covered in the *Grassroots Fundraising Journal*!

Ryan Li

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# Donor Perspectives on Giving

By Margie Fine & Ryan Li Dahlstrom

*“I think of giving as a muscle. With training, repetition and practice, it becomes stronger. The more often and imperfectly I give, the more engaged I am, and the more connected I feel to our collective well-being.”*

*-Nitika Raj*

**GIFT AND OTHER FUNDRAISING COACHES** and trainers often advise organizations to build relationships with their donors. We all nod our heads and furiously write down “build relationships,” but do we ever stop to think what this means to donors? What does being in a relationship with a group, its executive or development director, and/or organizer feel like to them? What do these relationships mean to them? Long-time donor/activist Chela Blitt and seasoned fundraising and philanthropy consultant Margie Fine had several provocative and challenging discussions about this after Fine’s report, *Untapped: How Community Organizers Can Develop and Deepen Relationships with Major Donors and Raise Big Money*, was released. (Visit [grassrootsfundraising.org/untapped](http://grassrootsfundraising.org/untapped) to download the report for free.) As a way to find answers to these questions, we interviewed three donors who support various social justice movements to learn what guides their giving practices and to better understand the donor side of the relationship story.

## MEET CONNIE CAGAMPANG HELLER

Connie is co-founder of the Linked Fate Fund for Justice at the Tides Foundation and a senior research consultant for the Haas Institute for a Fair and Inclusive Society at the University of California at Berkeley.

As a consultant, she creates spaces for people to deepen and broaden their understanding of racialization and its implications for their work. In her free time, she uses textile collage to explore race in America—capturing both what is beautiful and



Connie Cagampang Heller

inspiring about people and what is disturbing about the continually evolving system of marginalization.

***RLD: What got you into philanthropy?***

CCH: I was a late joiner to the philanthropy world. Growing up, I didn't even know that this world existed. As I came into my own giving as a major donor, I had many questions:

- Who has access to the donor world?
- What do I bring to the conversation?
- What systems of accountability can I create for myself?
- Who is excluded, who should be involved in the conversation, and how do we address this?

***RLD: If a donor is known in the community or is friends with people in the organization, how does this affect the relationship?***

CCH: Just as psychologist and philosopher Erich Fromm wrote about many different kinds of love, there are equally many different kinds of friends. This is no less true when there is a donor and an organization the donor is supporting. There are organizations, there are colleagues, there are fundraising staff, and there are friends. In one sense, it is no different from other situations, in that people have some degree of anxiety about whether or not they will be accepted or included in a community. However, unequal economic circumstances exacerbate that anxiety, changing how fully either party can be in the relationship. A frank conversation helps, partitioning social time from a request for support helps, multi-year support upfront helps, but it is complicated.

***RLD: What does a donor want from an organization?***

CCH: As a major donor, I see my work as a custodian for financial resources that I would not control if we had a democracy and an economy that worked. Since we live in the economy that we do, I look to organizations to do their part in changing and reshaping our future and to work in collaboration with other organizations in other sectors doing the same. I value clarity about the specific nature of a particular organization's role and its relationship to other organizations.

***RLD: What do fundraisers want from donors?***

CCH: Most of the time, introductions to other donors, grant makers, and financial resources. In the best relationships, there is a rich exchange of information. People in the philanthropic sector have access to a wide range of information and relationships that have the potential to increase access to decision makers. Similarly, organizational leaders often know other like-minded donors who can learn from

each other and work together to support a mutually appreciated organization.

***RLD: What happens when a development director changes jobs? Is the donor connected to an individual or the organization?***

CCH: I think it really depends on how robust the organization is. If the organization is strong, a transition period helps to facilitate transfer of that relationship, ideally to someone who the donor already knows because they have been promoted from within. When promoting from within isn't possible, it's important for donors to meet with the new executive or development director in order to maintain that relationship. If however, the substance of the organization really lies in the outgoing director, funds are likely to move with that director or to another stronger organization.

***RLD: How much should donors get involved in the business of the organization?***

CCH: Organizations should ask donors, in an explicitly advisory way, for their perspectives and insights. On the flip side, donors should give that information with no expectation that it will be followed. Donors, just as other participants in social change work, have valuable input and a view of the work that is situated in a particular way that has the potential to be helpful. I understand meddling to be when there is an expectation and associated actions that a donors' advice would be taken and followed simply on the grounds that they are entitled to give advice. That said, however, if I support an organization and find out that they are not adequately working to incorporate a structural analysis of race into all of their work, for example, I have to make a decision to either support their work with the understanding that they will incorporate that analysis into their work, or I can move my resources to other groups who are willing to take that on.

***RLD: What are some lessons you have learned as a major donor?***

CCH:

- There is a real fear and anxiety in donor meetings. There is so much on the line, and both sides feel as though they may be judged. Plus there is an increasing urgency of needed resources by the organizations requesting support, so this puts a lot of pressure on the ask. A question I try to use to guide me is, "How do we approach this as a collaboration with a recognition that we need each other?"
- The relationship between a donor and an organization goes far beyond a monetary contribution. Donors often have access to a large network of relationships that can also be leveraged. These relationships can go beyond what a large donation could provide.
- It's challenging to figure out the best socially just way to redistribute money.

## MEET NITIKA RAJ

Nitika is a South Asian queer immigrant woman, 31 years old, and has lived in the U.S. for about 13 years. Her goal in life, in each moment, is to be happy and free. She considers herself to be very spiritual and grounded in many diverse communities here. Growing up and coming into her own, personally and politically, has been a transnational experience that informs everything she does. Nitika is a national organizer with Resource Generation, which organizes young people with financial wealth to leverage resources and privilege for social change.



YAROMIL FONG-OLIVARES

Nitika Raj

### ***RLD: What does the term major donor mean to you?***

NR: To begin with, giving doesn't even feel like the right word. You can only give what you have. But spiritually, I was taught that we own nothing; we have nothing but our spirit. My politicization journey has taught me that wealth is accumulated by taking from others, so to me, "giving" is more about returning, and re-channeling. The best movement language for it right now is redistribution. I also feel strongly about changing the mechanisms of unfair distribution.

I have a lot of questions and struggle with the term "major donor" in movement work. A lot of people give smaller amounts consistently over long periods but aren't recognized as major donors or wouldn't consider themselves major donors. Given what I said earlier about really seeing "giving" as returning wealth to the collective that generated it, I would actually love to think about terms other than "donor" that can reflect this politic. I know I'm not the only one who feels this way.

### ***RLD: What guides your giving practice?***

NR: All my own giving is about my spirituality and my mom. Everything is about anonymity, which I see as a radical part of the redistribution politic. I'm not very public about how much I give and to whom, but raising these uncomfortable questions and elevating these issues is important.

I spent some time consciously figuring out my values by working with other members of Resource Generation in a praxis group (a peer group of young folks with wealth, who support each other to take action based on their values). Here is what I figured out:



- I believe in giving at every possible opportunity. I try not to wait for “perfect” giving, but just do what I can when I can, following opportunities, inspiration and heart.
- I want to be proactive and intentional about moving resources towards social change work that supports the transformation and increased power and self-determination of the most marginalized communities.
- My mom told me to give \$5 cash (and/or food) daily to any homeless person I meet on the street, and I also try to give \$1-\$10 cash to street artists/performers I enjoy—to cultivate the practice of daily giving in a literal, physical way.
- I prioritize giving material resources. When I moved out of state, I didn’t sell anything. I pushed myself to let go of a lot of my belongings to give them to folks who needed them, rather than to resell them and make a profit. I had help from my parents to buy a lot of those things, so it didn’t feel right.
- In addition to my own giving plan and proactive giving, I try to give whenever asked (unless in conflict with my values). Say yes! Encourage people to ask and cultivate yourself to always say yes.
- I am trying to be more transparent in my communications, and to be consistent so that I can be relied upon. I want to support the stability and growth of important and inspiring work.
- Where I’d like to grow is to return more wealth in small amounts through regular donations (i.e. monthly sustainer) so that organizations can plan on it. I’d also like to move more money towards the global south. I’d like to learn more and act more.

***RLD: Are there any particular communities or organizations you have prioritized in your giving?***

NR: I’m devoting resources towards those most impacted by the issues facing our communities who need to be alive and well for their voices to be heard. I’ve also approached people in my community, unsolicited, to share my resources with them. I find that I prioritize the healing and self-sustainability of queer and trans people of color who have been disenfranchised by their own families. I see this as paying it forward and part of our legacy of communities of color taking care of our own. I do have concerns about how these gifts may affect my friendships, but I try to be frank and do my internal process of letting go.

***RLD: How have you found it different to give to organizations rather than directly to individuals or communities?***

NR: I recently gave \$5,000 to an organization. Although I wanted to make a multi-

year commitment, I didn't because I have access to these resources now, but the near future is uncertain. I wish I had found a way and taken the risk to just communicate my desire and the inability to make a commitment. Some close friends who are excellent fundraisers have told me that they would have liked knowing my intentions to give earlier on in the process for their own planning, so I am trying to get better at doing this.

### **MEET CHELA BLITT**

Chela is a Kansas City-born, queer Jewish video maker, writer, and donor activist. Her documentary "Sisters and Daughters Betrayed," which looks at the root causes of international sex trafficking, is used widely in colleges and universities. Chela has served on the Board of the Urgent Action Fund for Women's Human Rights and The Lia Fund, and is active in progressive philanthropic circles. She is currently experiencing the other side of the coin as she raises funds to relaunch the progressive summer camp she attended as a teen, the Encampment (formerly Encampment for Citizenship).

***RLD: What does it mean to you to be a major donor?***

CB: As a donor, where is my place? I identify with activism, and I see being an informed, strategic funder as my main avenue of actively participating in social justice movements.

I live my life from this place, but being a donor, especially a major donor, sometimes puts me in a box. I know it's important for non-profit fundraisers to cultivate relationships with major donors, but that can be confusing for me on a personal level. I don't want to be treated as a "special person." Yet even when it is handled as gracefully as possible, the imbalance of power in the fundraiser/donor relationship is inherent.

***RLD: If a donor is known in the community or is friends with people in the organization, how does this affect the relationship?***

CB: I'm not always sure how to navigate overlapping professional and personal relationships. I sometimes wonder if someone is asking my opinion because they care about what I think or because I'm a major donor. Is someone asking me to lunch as a friend or because they want to fundraise or both? Over the years I have become more comfortable with saying something right away if I am unsure. For example I might tell a colleague/friend that their project does not fit within my funding criteria, but I am interested in going to lunch to learn about what they are doing and brainstorm about their project. I've made some close friends through these relationships, so the anxieties I am describing can certainly be overcome.

Reading Untapped: How Community Organizers Can Develop and Deepen

Relationships with Major Donors and Raise Big Money, which demystifies major donors to grassroots fundraisers, helped me put the fundraiser/donor relationship in perspective. Margie Fine writes about the desire also from the fundraiser's side to have authentic communication. She compares talking to a potential donor to talking to a potential volunteer. With both of these relationships, the goal is to find where there are mutual values and desire to move forward the goals of the organization.

In fact, the roles can be reversed. In the case of one organization with which I have been involved as a donor and Board member for many years, I have cultivated relationships with the executive directors as part of my shepherding forward the organization, keeping my finger on the pulse of its institutional health. I can be a sounding board, share my knowledge of the institutional memory, and at times I have offered the organization donations for coaches and strategic planning retreats when they seemed necessary.

***RLD: What have you learned along the way?***

CB: The lines between activists, nonprofit or foundation staff, and donors aren't so clear. Many of us "wear more than one hat," or have over the course of our lives.

Donors don't "just write checks." To be a strategic progressive funder requires knowledge of a field or many fields through research and analysis, experience, collaboration, and a commitment to long-term goals.

I've learned the ongoing importance of being aware of class privilege—sharing the access I have when I can, and refusing to participate in the privilege at other times.

I've been able to learn more about some issue areas that I care about and support by becoming an active donor and/or board member with a couple of organizations.

I have recently joined a group of volunteers who are relaunching a project I was a part of as a teen. I am experiencing how hard the climate is these days for finding foundation grants for general support for grassroots organizations. Funds are scarce and criteria are very narrowly defined. It makes the extremes of wealth disparity all the more graphic to me.

I have developed my own principles for how I donate that balance my desire to use philanthropy as a tool for social change, and my need to have time and relationships where I am an activist and artist in other ways, so that being a major donor does not solely define me. For example, I generally do all my donations once a year in the spring, and fund community or issue-based foundations run by activists or where activists play an active role in grantmaking. That way I share the decision-making power that comes with wealth, and the funds are accessible to grassroots groups through a public application process. I think as major do-

nors we need to have a conversation about making our priorities public, it would certainly make the lives of fundraisers a lot easier.

### **Moving Forward**

As noted by each of these donors, respectful relationships that see donors as full people with many ways to contribute are essential. This begins with our language; we shouldn't "hit someone up for money" or "target them." When we listen to donors, we understand their side of the story, which allows us to move beyond transactional relationships or "selling" our organizations. By removing the confusion, mystery and potential for misunderstanding out of donor/fundraiser relationships, we create an atmosphere that is successful, meaningful, and long lasting for all involved. Thank you to Connie, Nitika and Chela for sharing your thoughts. ■

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Margie Fine is a philanthropy and fundraising consultant. Ryan Li Dahlstrom is editor of the Grassroots Fundraising Journal.

# Using Surveys to Strengthen Relationships with Donors

By Stephanie Roth

**HAVE YOU EVER FOUND YOURSELF GETTING READY** to organize an individual donor campaign and realized that you had too little information about your donors to determine how to approach them or who should approach them? Or you wanted to find ways to better engage your organization's donors but had no idea where to start? Or you recently took the time to analyze your data and discovered that your donor retention rate was far below the industry standard of 65 percent? Although a donor survey will not completely solve all of these problems, it can be an extremely useful tool for learning more about your donors to inform your strategies going forward.

There are many reasons to survey your organization's supporters including: to get a general sense of how your donors feel about your work; to learn more about who your donors are; to inform the feasibility of a large capital campaign; and more. This article focuses on using donor surveys to help you develop stronger relationships with your donors, to better understand how they want to be engaged, and to fine tune your communication with them.

Surveying your donors can be a great way to learn some quick, but important information about who they are, what is important to them, and whether there is potential for increased participation in the organization or higher levels of giving. It can help you figure out which of your donors to prioritize for in-person meetings and solicitations, who might have the potential to get more involved as a volunteer (or even a board member), and what is the best method of communication to reach them. It can also provide you with critical feedback on how donors experience your fundraising efforts and activities, and even turn a disgruntled former donor into one of your biggest supporters.

## How Important are Your Donors to You?

Before embarking on this path of surveying your donors, you need to clarify why you are doing it. You also need to assess what your donors' opinions, reactions and feelings mean to you, and what your capacity is to respond to the feedback

you get from them. If you find that some of your donors are upset because they are not thrilled with the new direction your organization has taken, they had a bad experience with a volunteer who called to ask them to renew their gift, or they think you are asking for money too often, will you be able to address their concerns and keep track of each donor's preferences? Of course, just because a donor is unhappy with some aspect of your work doesn't mean you have to make a change. But if a significant number of donors share a similar criticism or question, that can be important feedback for you that might have implications for your programmatic priorities, your donor communication methods, and/or the extent to which your donor base is (or is not) made up of your key constituencies.

You might start by asking yourself the following question: Are your donors a part of your organization's constituency that is important to you beyond the money they contribute? For example, are they also sometimes your volunteers, members, leaders, and allies? Do you take into account what they think about your programs, priorities and direction your organization is moving in? If in your heart you really want your donors to cheer you on from the sidelines as they open up their wallets at the end of the year, then asking them for their opinions, preferences and feedback may not make sense.

If, however, you know your donors are more than sources of funds, but also a group of people who have the potential to be an integral part of what makes your organization successful in achieving its mission, conducting a donor survey might be a great way to begin building closer ties to them.

### **What to Include in a Survey**

Since you can't learn everything you might want to know about your donors from a written survey, focus on the key pieces of information you want to learn that will actually be useful in the near future. Only ask for information that you have the capacity to track in your database, meaning you have staff members or volunteers who can commit the time to entering all of the responses into the database. Also only ask questions to which you have the capacity to respond. For example, the ACLU's donor survey (downloadable from [grassrootsfundraising.org/surveys](http://grassrootsfundraising.org/surveys)) starts with a multiple choice question asking which areas of the organization's work the donor is most interested in. This question only makes sense if the organization is then able to tailor its communication with donors to focus on each donor's primary interest areas.

The Religious Coalition for Reproductive Choice found that the question of how the organization ranked in the donor's giving priorities was extremely helpful in identifying the most committed donors, and as a result, they were able to personalize their approach to them accordingly. (See Martha Farmelo's article, "Getting to Know Your Donors: The Donor Survey, GFJ, Vol. 20, #1)

## Examples of Topics to Include in Your Donor Survey

- Preferred means of communication: e.g., phone, email, text message, mail.
- Preferred method of receiving updates about the work: e.g., print newsletter, email newsletter, Facebook or Twitter posts.
- Information about who they are, including demographic information (e.g., age, race, gender), and their relationship to your organization (former board or staff member, parent or other relative of a program participant, etc.).
- How important your group is to them. Ask them to rate you compared to other groups they support.
- What they think of your organization's effectiveness.
- Whether they would consider becoming more involved in your organization.
- Whether you can publicly thank them/list them in your newsletter, annual report, and/or website.
- How they first learned about your group and/or who they know in the organization.
- Whether they would like to learn more about making a legacy/planned gift.

## Other Ways to Learn from Your Donors

A written survey can only provide so much information. Sometimes interviews or focus groups may be a better choice or an additional way to get input from your donors. According to William Vesneski and Nancy Adess (“What do They Really Think? Creating and Analyzing Surveys” GFJ Vol. 23, #5),

“Interviews and focus groups are more appropriate when you have the following goals:

- You are seeking to understand a range of ideas, attitudes, and feelings held by your stakeholders
- You are trying to understand different perspectives among groups or categories of people
- The purpose of your work is to uncover factors that influence opinions, behavior, or motivation
- You want to pilot-test ideas, materials, plans, or policies
- The audience for your research places high value on capturing stories and/or anecdotes.”

And don't forget that meeting with your donors, whether in the context of asking them for support or building the relationship, is an important way to gather information about their interests, concerns, and preferences as well. Pay attention to what they tell you in the course of the meeting, and make sure the notes in your database reflect anything they say that you would want to remember for future communications.

## Survey Design and Implementation

Consider the following as you get ready to write your survey questions (and for more detailed information on creating useful surveys, see “What do They Really Think? Creating and Analyzing Surveys” by William Vesneski & Nancy Adess, *GFJ* Vol. 23, #5).

**Closed-ended versus open-ended questions.** A closed-ended question would be one in which a yes or no or multiple choice response is required. An open-ended question would be one in which the respondent expresses an opinion or point of view. An example of an open-ended question is, “What do you wish our organization did differently?” Ideally, you want your survey to include some of each question type.

**Anonymity.** Do you want the survey respondents to be anonymous? If you are asking questions that donors may be reluctant to answer completely honestly, especially if the feedback is critical or negative, consider using an anonymous survey. Surveys for feasibility studies for capital campaigns are typically anonymous to make sure that you are getting a truly accurate sense of how much support there is among your donors for a large fundraising project. However, if you are using the survey to learn more about your donors so you can accommodate their individual preferences and determine their potential for greater support or engagement with the organization, you will want to know the identities of the respondents.

**Increasing response rates.** In order to get the greatest response rate you can, consider creating incentives to encourage people to take the time to fill out your survey. Response rates to surveys can range from 15 to 50 percent (a wide margin). Ways to increase response rates include sending out the request multiple times, offering something to those who do respond (e.g., a discounted ticket to your next event, a chance to win a prize, or a copy of a recent publication), and making follow up calls to remind recipients to fill out and return the survey.

## Format

Most surveys are now done online, and the software that exists for them is often either free or very affordable (like SurveyMonkey, LimeSurvey, etc.). Another advantage of online surveys is that they can aggregate and sort the data for you, and you can import the responses directly into a database. Keep in mind that you may have some donors who do not spend much time online or prefer to fill out a paper survey, so you should make that option available to them.

## Taking the First Step

Donor surveys are a wonderful tool—underutilized by most grassroots organizations—for getting to know more about your donors. If you are not sure about your capacity to respond to the information you generate from a survey, start with



a shorter survey and choose the questions carefully. Include the three top things you would like to know, and consider a longer survey as your capacity increases. The more you get to know your donors, the more enjoyable your interactions with them will be, and the better you, and they, will feel about asking for their continued support. ■

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Stephanie Roth is a principal with Klein & Roth Consulting.

## SAMPLE SURVEY

# GIFT New Donor Survey

Dear Friend,

Thanks so much for giving to the GIFT Generations fundraising campaign this year. Our Leadership Team did a great job of spreading the word and inviting wonderful people like you to join GIFT's community.

Since this is your first donation to GIFT, we'd like to get to know you better. Please take 5 minutes to fill out this brief survey. We'd appreciate hearing from you by November 6th.

There is a self-addressed stamped envelope enclosed for your convenience. There is no need to fill out any of the information on the envelope itself.

Thank you!

**Name:** \_\_\_\_\_

### 1. Why did you give to GIFT Generations? (check all that apply)

- I know someone who is involved in the organization. Who? \_\_\_\_\_
- I like your programs for people of color
- You have practical and accessible fundraising resources
- I like your perspective on social justice fundraising
- Other \_\_\_\_\_

### 2. Do you consider yourself a...? (check all that apply)

- Paid fundraiser

- Unpaid/volunteer fundraiser
- Fundraising trainer/consultant
- Fundraising is not my core work but is part of it
- I don't do any fundraising but just support what you do!

**3. We'd like to update you regularly on our work and how it's making a difference. How would you like us to communicate with you? (check all that apply)**

- Monthly eNewsletter and occasional email announcements  
Email: \_\_\_\_\_

- Phone calls a couple of times a year  
Phone (please indicate  work,  home, or  cell): \_\_\_\_\_

- Mail (we mail newsletters and appeals for donors a couple of times a year)
- In-person meetings
- Other: \_\_\_\_\_

**4. Do you have any other communication preferences you'd like to share with us?**

**5. Is there anything else you'd like to share with us?**

***Thank you so much for your time and input!***



**ACLU** of NORTHERN CALIFORNIA  
 PROTECTING CIVIL LIBERTIES  
 IN CALIFORNIA SINCE 1934

## ACLU of Northern California Donor Survey

1. In what area(s) of ACLU work are you most interested?

- 2.
- |   |   |   |
|---|---|---|
| <input type="checkbox"/> Criminal Justice                             | <input type="checkbox"/> Death Penalty                    | <input type="checkbox"/> Disability Rights          |
| <input type="checkbox"/> Drug Law Reform                              | <input type="checkbox"/> Economic Justice                 | <input type="checkbox"/> Educational Equity         |
| <input type="checkbox"/> Free Speech/Censorship                       | <input type="checkbox"/> Immigrants & Language Rights     | <input type="checkbox"/> International Human Rights |
| <input type="checkbox"/> National Security/ Government Abuse of Power | <input type="checkbox"/> Police Practices                 | <input type="checkbox"/> Privacy                    |
| <input type="checkbox"/> Racial Justice                               | <input type="checkbox"/> Religious Freedom & Church/State | <input type="checkbox"/> Reproductive Rights        |
| <input type="checkbox"/> Rights of LGBT People                        | <input type="checkbox"/> Rights of People with HIV        | <input type="checkbox"/> Students' Rights           |
| <input type="checkbox"/> Technology                                   | <input type="checkbox"/> Voting Rights                    | <input type="checkbox"/> Women's Rights             |

Which ACLU strategies do you feel are most important for advancing our mission?

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> Community Organizing | <input type="checkbox"/> Legislation               | <input type="checkbox"/> Litigation       |
| <input type="checkbox"/> Public Education     | <input type="checkbox"/> Public Policy Development | <input type="checkbox"/> Youth Leadership |

3. Which best describes the way you read the ACLU News (the quarterly newsletter of the ACLU of Northern California)?

- I often read the articles that interest me.
- I usually just skim the newsletter.
- What newsletter?

4. In what way(s), if any, would you be interested in becoming more involved with the ACLU?

- Contacting legislators about critical civil liberties issues
- Email activism. My email address for receiving ACLU Action Alerts and eNews is:

- 
- Fundraising
  - Helping to mobilize members to take action through phone banks or other means
  - Participating in ACLU activities through the chapter in your local area
  - Staffing our legal help phone line (*requires a commitment of one day a week for 6 months*)
  - Public speaking
  - Other: \_\_\_\_\_



5. When possible, would you prefer to receive our mailings by email rather than snail mail?

- Yes. My email address for this purpose is: \_\_\_\_\_  
 No.

6. How often do you visit the website of the ACLU of Northern California ([www.aclunc.org](http://www.aclunc.org))?

- Daily                       Weekly                       Monthly  
 Occasionally               Never

7. If you do visit the website of the ACLU of Northern California, for what purpose(s)?

- Civil liberties news                       Job hunting                       Research  
 To make a donation                       To get the ACLU's take on an issue  
 To take action on a bill                       Other: \_\_\_\_\_

8. What type(s) of ACLU events would you be interested in attending?

- Activist rallies                       Film screenings  
 Large lunches, dinners or open houses                       Membership conferences  
 Small, issue-focused briefings                       Social networking  
 Other \_\_\_\_\_                       None at this time

9. Which, for you, would be the most convenient time(s) to attend an ACLU event?

- Weekday breakfast                       Weekday dinnertime  
 Weekday lunchtime                       Weekend brunch/lunch time  
 Weekday right after work                       Weekend evening

10. What other nonprofit organizations do you support?

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11. Please rank the ACLU among the other organizations you support:

- Most important                       In the top 25%  
 Somewhere in the middle                       In the bottom 25%



**ACLU** of NORTHERN CALIFORNIA  
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12. Are you interested in joining the DeSilver Society, a group of people who have included the ACLU in their estate plans?

- The ACLU is already in my estate plan/will.
- I want more information on naming the ACLU in my estate plan/will.
- No, I am not interested at this time.

13. Why did you first become involved with the ACLU?

---



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14. Do you have any questions or concerns about our activities that you would like to share?

---



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15. Is there anything else you would like to tell us?

---



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***Additional information...***

Preferred Phone: \_\_\_\_\_  home  work  cell

Email: \_\_\_\_\_

Occupation: \_\_\_\_\_

Age:             under 30             30-45             46-60             60+

## SAMPLE: DONOR SATISFACTION SURVEY

1. I was appropriately thanked for my contribution(s).

Strongly Agree       Agree       Neutral       Disagree       Strongly Disagree

2. I was thanked for my contribution(s) in a timely manner.

Strongly Agree       Agree       Neutral       Disagree       Strongly Disagree

3. XYZ organization asks me for appropriate gift amounts.

Strongly Agree       Agree       Neutral       Disagree       Strongly Disagree

4. XYZ organization doesn't ask me for donations too often.

Strongly Agree       Agree       Neutral       Disagree       Strongly Disagree

5. XYZ organization cares about my needs as a donor.

Strongly Agree       Agree       Neutral       Disagree       Strongly Disagree

6. The fundraising office has responded to my requests in a timely manner.

Strongly Agree       Agree       Neutral       Disagree       Strongly Disagree

7. XYZ organization is in touch with me outside of requests for financial support.

Strongly Agree       Agree       Neutral       Disagree       Strongly Disagree

8. XYZ organization effectively informs me about the impact of my gift(s).

Strongly Agree       Agree       Neutral       Disagree       Strongly Disagree

9. I would recommend XYZ to my family, friends and associates as an organization to financially support.

Strongly Agree       Agree       Neutral       Disagree       Strongly Disagree

10. In what way could we increase your level of satisfaction as a supporter of XYZ organization?

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11. Is there anything else you would like us to know?

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Redistribution Fund collective member Elizabeth Sy chats with a fund recipient at one of their community dinners.

# The Redistribution Fund: Rethinking Giving

By Stephanie Syd Yang

**THIS WAS OUR CHARGE:** redistribute \$100,000 in a collective process to support individuals and collectives working towards more sustainable community-based and community-reliant economic systems.

Sounds simple enough, right? If another world is possible, then surely a more equitable redistribution of wealth is also possible. This is what the Redistribution Fund believes. Putting this into practice for us, however, was a bit more complicated than simply stating this belief. Across the globe and across movements, this desire for greater economic justice and a fair distribution of resources is widely

shared. Understanding the behemoth that is the global capitalist economy also meant that we understood that transforming our current economic system would require a lot of work and, ironically, a lot of money. Would \$100,000 be enough to even make a dent?

### **From Theory to Practice**

Through a collective process, the Redistribution Fund strives to actively redefine what is possible through radical philanthropy at the intersection of giving and resource development.

To best explain what our work is about, I should explain how we formed. In 2007, a close friend of mine hired me to help coach her through a process of ethically handling and redistributing an inheritance she received when her step-father passed away. Up until then, she had been practicing her own version of redistribution of her wealth through gifting portions of her money to individuals with urgent immediate needs. The need for this type of support was (and is) great. Soon, people were referring others to her. She was the only one making decisions on how to help and how much to share. Quickly this began to feel like a burden that was out of sync with her values of shared leadership, anti-capitalism and redistribution. There had to be another way to do this that didn't seem as if she was perpetuating an oppressive model of "I hold power because I have money and you don't."

During this time, we worked through her values, unraveled the ways she felt (dis)connected to her resources, and what her hopes were for broader economic self-sufficiency in the world. What emerged was the beginning of the Redistribution Fund. Beginning with giving over a portion of her assets to individual members of her community with whom she had already shared resources, our vision was that through collective decision making, equitable resource sharing was possible to achieve.

Thus began the hard work. Susan, one of the founding collective members, recalls our journey in this way: "When we came together, we didn't know what it would look like, but we knew we wanted to build something new—a different form of giving or redistribution, where those redistributing the wealth did not dictate how it was used (no micromanaging of the funds once distributed.) We wanted to prioritize getting this money back to folks who didn't typically have access to formalized sources of funding. We wanted a system of redistribution that was built on a model of interdependence, trust and transparency, rather than a top-down system of funder-to-recipient."

Redistributing funds in a collective manner meant that we first had to go through the work and time to form a collective. The first step was simply figuring out who we were. In 2008, the group kicked off with an all day retreat, sharing personal stories, discussing shared values, getting excited about our hopes for what



### REDISTRIBUTION FUND GOALS:

- To redistribute private funds through a creative and flexible collective process.
- To support existing and emerging community resources that are rooted in accountable and sustainable interdependence.
- To provide funding to groups that support individuals' abilities to meet their basic medical, legal, food, and shelter needs.

The redistribution of wealth, however, proved to be a bit more complicated than we envisioned. We thought we had all our bases covered. I brought years of program management and donor organizing from within the philanthropy sector, others brought skills in community organizing, group facilitation, and program development. Many of us were already members of other radically minded collectives. We all truly believed that this would be enough to get the ball rolling.

What we imagined would be a painless two year process of redistributing funds turned into a five year process. Finally, in October of 2012, we wrote our last check for redistribution.

redistribution might mean, and of course, sharing lots of good food. In fact, eating together is still one of our core shared values of how we love, share and build community. We made our first collective decision that weekend: each of the two cycles of giving would end with a community dinner, hosted by the Redistribution Fund. Redistributing resources is about building tighter communities and what greater way to do this than over a shared meal of home cooked food.

The Fund began as a group of three members, then four as I was invited to fully participate. After some ups and downs, we eventually grew to our final size of five, expanding and contracting like a healthy heart. We are a group of radically minded queers and not surprisingly, we spent a lot of that initial time processing our own stories of class, race, identity, and power. We delved into the deeply personal, and we wrestled with the political. It was both transformative and necessary. If we were to practice a vision of equity, shared power, and the redistribution of wealth, we needed to learn to embody those values within ourselves first. What emerged after two years was a collective group that was committed, ready and open to making this happen.

We concluded during this time that redistribution through this fund would be about sharing resources in creative and flexible ways that underscore the interdependence that we believe is at the core of how healthy communities thrive.

### Creating a New Story

All of us in the collective had been on the receiving end of “philanthropy” in some form before, either through working at a non-profit or individually because of personal need. Each of us had stories of seeing how that system reinforces inequity and disrespect, often through requirements of having to “prove” need and

merit. The last thing we wanted to do was recreate any of those dynamics. We challenged each other to think back to our former roles as grant seekers, rather than allowing ourselves to just think of ourselves as “those with money to give away.” We wanted to create and tell a different story, one that underscored interdependence, trust, resilience, and possibility.

To begin with, we wanted to be able to support collective efforts that were operating outside of the nonprofit industrial complex, primarily groups that did not have formal 501(c)3 status or fiscal sponsor relationships. Getting an individual tax write-off was also not of interest to any of us, nor to our friend who initially redistributed these funds to us. We didn’t have to play by someone else’s rules (i.e., the IRS), which meant that we could make new ones that were more in line with equity and justice.

We supported these types of groups because we saw their work as often connected to emerging and immediate needs within intimate community networks. Given current legal structures, these smaller, collective efforts are overlooked more often than not by traditional philanthropy.

Redistributing these resources was not just about the recipients of our checks, it was also about how we “invested” the resources before we wrote the checks. Placing the funds in a community-based credit union meant that we were contributing to community reinvestment and economic justice in broader ways.

As one group we redistributed funds to in the first year put it, “[The process] felt less like we were having to work a big foundation full of weird liberal rich people and their privilege about a lot of things, and more like we could just be honest.” We learned that redistribution is not about reversing power dynamics. Rather, it is about creating relationships and spaces that nurture more equitable, shared expressions of power.

Internally, we struggled with what redistribution meant for us, as a collective. We came to a consensus that we needed to honor each of our contributions of time, travel and energy. In 2010, we instituted a stipend structure for collective members to access funds to offset the costs of travel and participation. A dear friend of mine used to say, “If my community is thriving, then I am thriving. If I am thriving, so my community must also thrive.” This stuck with me over the years. As we were working to break down the “us vs. them” dynamic that exists so fiercely in philanthropic structures, we knew that we also had to support each other in practical ways. For Panella, another one of the collective members, “[The practice of] redistribution is balancing. It isn’t about taking from one and giving to another, but rather, it is more like building a team.” We are all a part of a larger community structure, this larger team. Stipends helped us put this into practice.

## Redistribution Fund Timeline

<p><b>2008</b> Daydreams of transferring inherited, individually-held wealth into a practice of radical philanthropy through a collective process begin.</p>	<p><b>2010</b> Redistribution Fund's resources are transferred to the collective and housed with the Mission SF Federal Credit Union, a community-owned, non-profit financial institution that helps build the economic and financial health of Mission district residents in San Francisco.</p>	<p><b>2011</b> Our first year of redistribution, with decisions collectively made through regular in-person and conference call meetings.</p>	<p><b>Fall 2011</b> First round of funds redistributed to groups and projects based in the San Francisco Bay Area, such as the HOOK Collective, SF Botanical Medication Clinic, Queer Rebel Productions, and the Street Level Health Project.</p>	<p><b>January–October 2012</b> Second round of redistribution, this time for groups and projects based in Los Angeles County, such as El Hormiguero, Revolutionary Autonomous Communities—Los Angeles, qteam, and DropLabs.</p>	<p><b>Spring 2013</b> Collective process of deep reflection and story telling to inspire others to explore and practice more radical redistribution of wealth.</p>
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### Space to Grow

This process has never been perfect. Figuring out how to most effectively work towards an equitable redistribution of wealth is going to take all of us making mistakes, learning lessons, and trying out new ideas. Ours is one experiment, hoping to inspire many more.

No matter how hard we tried, we all recognized that we were still perpetuating a power dynamic of imbalance. Only we had full access to the money, we were the only ones making the choices about what we would focus on, and only we decided what the criteria for giving would be (though definitely not in a vacuum). Even as a collective, we were still only five people making decisions on the reallocation of resources. We are still very much living in a capitalist society that places profits over human need at (almost) every level. The current socio-economic structures need to continue to transform so that new ways of relating to money can emerge.

The Redistribution Fund was a powerful exercise in collective financial governance and raised new questions for us to consider:

- What is the relationship between redistribution and sustainability?
- What does it look like to share resources in large urban areas as opposed to more rural, spread out regions?
- How can the practice of the Redistribution Fund effect change in larger economic systems?

Through our process, we recognized that we were just one drop in a bucket,

in a specific moment in time. We participated in sharing resources, but like all resources, they were finite. We recognized the tension between immediate needs and longevity. As such, we chose to distribute along these lines—giving to groups that were addressing immediate needs and also to groups that were building structures for extended community support. We need both. At the same time, simply giving money is not the answer. Fundamental change to economic inequality will not be possible without breaking down and rebuilding our society's oppressive economic systems.

### **Why Radical Philanthropy Matters**

What we learned from this challenges was that yes, \$100,000 can do a lot, even broken up into amounts as small as \$500. The Redistribution Fund was not just about giving money, it was about shifting the ways that organizations, groups and individuals were asking for and raising money. It was about creating a more just, transparent and accessible process of fundraising and resource building. It was also about helping to build community-based structures that could support people and families in a more holistic way.

As a member of one group who received funds summed it up, “I really enjoyed the process because it was genuine. Too often I have gone to a funder and felt like there was a hierarchy and I was at the lower end of it. The community dinner was people being people without the pretense. Thank you for honoring my personal dignity.” What if all experiences involving money left us each with a sense of dignity?

Radical philanthropy, in all of its shapes and sizes, is critical because it is about shifting power dynamics, increasing transparency, and embodying justice. It has the potential to change the way those seeking resources are experiencing power. The more this shifts into an experiential practice of shared power by those “seeking funds,” the more transparency and shared decision making will be demanded of mainstream philanthropy. It is changing practice and redefining roles. While grassroots fundraising is asking communities to put these values into practice, radical philanthropy is an attempt to mirror and support these values by making resources more widely accessible and available.

As our collective member Susan puts it, “[The Redistribution Fund] was an experiment in how to take philosophical discussions and beliefs based in social and economic justice and the idea of redistribution of wealth, and put those beliefs into practice, at a much larger scale than any of us collective members could have done on our own.”

As we enter our final year as a collective together, we are hoping to build deeper relationships with each other while grappling with these questions that have come up. Our adventures in the Redistribution Fund are just one step along the way of figuring out what an equitable redistribution of wealth looks like. What more can

we collectively learn? How will we continue to move together towards a world in which resources, power and love are shared equitably, fairly and openly? This world is absolutely possible. ■

The Redistribution Fund is a collective based in LA and the Bay Area. We are AC Panella, Andy Woodruff, Elizabeth Sy, Susan Sarratt and Stephanie Syd Yang. Syd is a healer, intuitive life coach and spiritual counselor who loves working with individuals to transform, heal and rock those moments of life transitions, through her healing practice Blue Jaguar is Love (bluejaguarlove.com). She has spent many years working in the worlds of philanthropy and donor organizing and still spends lots of her time dreaming about living in a world post a radical redistribution of wealth.

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Uma Rao listens to a workshop participant practice making an ask.  
Photo by Zoila Aviles, Hueso Productions

## Understanding Donor Motivations (Including Your Own!): A Training Exercise

By Uma Rao

**ASKING FOR MONEY FROM A POTENTIAL MAJOR DONOR** is always a bit nerve-wracking and anxiety producing. Often times, asking for that larger gift can bring up a lot of our baggage around money, class differences, power dynamics, and fear of rejection—like most face-to-face asks do.

As fundraiser trainers, many of us have found that uncovering a bit more about our own giving practices, values around giving, and connection to the work of groups we give to can help put us in the right frame of mind before making that ask. It is easier than we may think to put ourselves in donors' shoes, but let's start with our own shoes!

This training exercise will help you work with others in your group to explore areas of the work you feel passionate about and practice key talking points. It will also allow you to reflect on your own relationship to giving and what guides that practice. From there, you can ask yourselves these same questions from the perspective of the donor. When you know what motivates you, it can be easier to think about what motivates someone else.

## Exercise: Understanding Donor Motivations (Including Your Own!)

**Goal:** To discover your motivations for giving and prepare to ask a donor for a gift.

**Participants:** Anyone who will be fundraising by making direct asks for the organization. This exercise works best with 5 to 10 participants.

**Time needed:** 30-40 minutes

**Materials:** Flip chart paper, markers, tape

**Preparation:** Decide who will facilitate the exercise. Choose four to seven questions from the list in the sidebar that are relevant to your group, or create your own questions. Write one question at the top of each flip chart sheet. Tape the sheets up around the room, leaving a few feet of space in between sheets.

### Steps:

1. Everyone picks up a marker. Without talking, each participant walks around the room, writing answers to each of the questions on the posted sheets. People should spend no more than two minutes on each question. Provide two-minute and one-minute warnings.
2. Divide participants into as many groups as there are flip chart sheets or fewer (ideally, three to five people per group). Have each group stand in front of one of the flip charts and briefly discuss the answers on each sheet. After a few minutes, each group moves on to the next sheet, and so on. The total amount of time for this section should only be two to five minutes per question. Be sure to give time notifications to keep groups moving, as this section can take quite long otherwise. Don't worry if there isn't enough time for every group to discuss all the questions. An alternative, if you are short on time, is to give the entire group five or ten minutes to walk around the room looking at all the charts individually without discussing their responses.
3. Bring the large group back together and ask these reflection questions:
  - Did you find any of the questions to be particularly challenging to answer?

- Did you find any of the responses to be surprising?
- Did you notice any similarities, differences, or themes among the responses?
- What information do you need from a donor to make their gifts personally relevant to them?

### Follow-up

Use the information you gather from the activity to help inform your planning for major donor asks and campaigns. For example, if several people shared that there is a new and exciting program, you may want to create a one-pager that highlights this program and why you got started. You can do this especially if you want to share this information with a particular set of donors.

You can then put together materials for each person who will ask donors for gifts at your organization. It can include key materials such as a one-pager about a new program or building, an annual report, a public budget, a list of staff and board members, a current newsletter, a donation envelope, and your business card.

Before entering an ask meeting, try to outline the following for yourself. Keep in mind your time constraints.

- How can I remind the donor of what motivates them to give? If I don't know, how will I ask them?
- Talking points:
  - What story/narrative can I share with this donor? (Any compelling story about a client, community member, or staff member?)
  - Statistics/Key information?
  - What is our vision for change? What is this particular ask for? (A new project? Continued operating funds?)
- How much will I ask for? (Refer to giving history.)

### Sample Questions

Why do I give? (Ask yourself this question over and over again, at least three times. Keep writing down the answers.)

Why have I said yes when asked? Why have I said no when asked?

Why do I care about the issue(s) I support?

What is the urgency in addressing this issue(s)?

What is my favorite client/constituent story?

Why this particular organization?

What is my favorite program within the organization?

Who are the staff superstars? What are their accomplishments?

What is new and exciting to me here? (Any new programs? A new location that signifies growth?)

What is our vision for change? How does our work lead to change?

How are we a leader in this field?

How do we collaborate with others?



Finally, don't forget to practice! Have a colleague do a role play with you as you practice your ask. The importance of practicing cannot be emphasized enough—it helps you become comfortable with all of your talking points and prepare for questions that may come up in your meeting.

When you can articulate your own passions for your work, a donor will understand that and likely consider making their own gift. Our own motivation to give is truly one of the best tools we have for success in fundraising! ■

---

Uma Rao is based in Seattle and is the Western Washington Regional Development Organizer for the Pride Foundation. She believes that stronger movements include grassroots philanthropy, community based strategies and leadership development.

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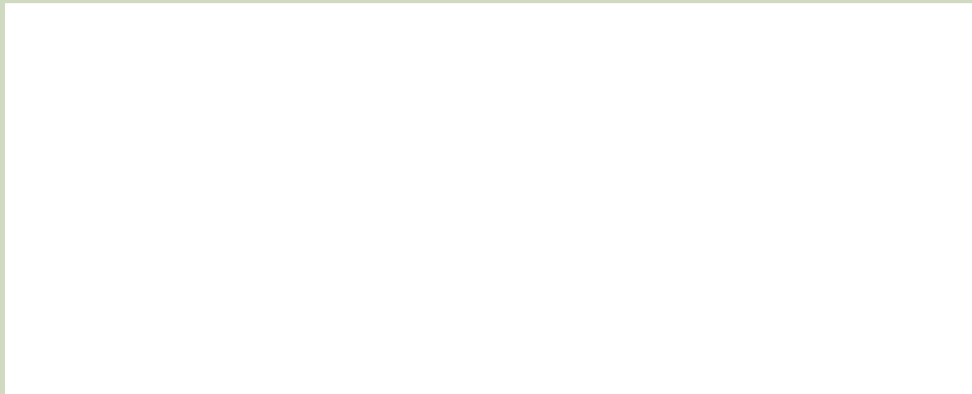
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