

Grassroots Fundraising Journal

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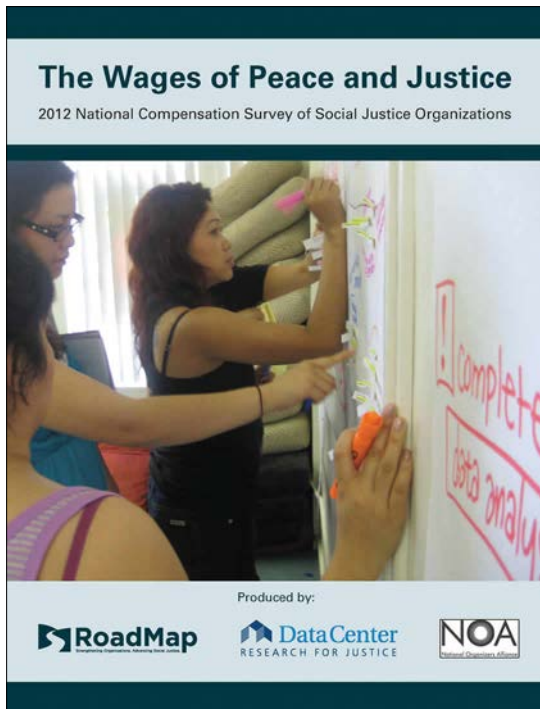


Sustaining Ourselves, Sustaining Our Movements

Pay Equity for Social Justice Work
Developing Member Leaders
Challenges in Development
Fundraisers Anonymous

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FEATURE



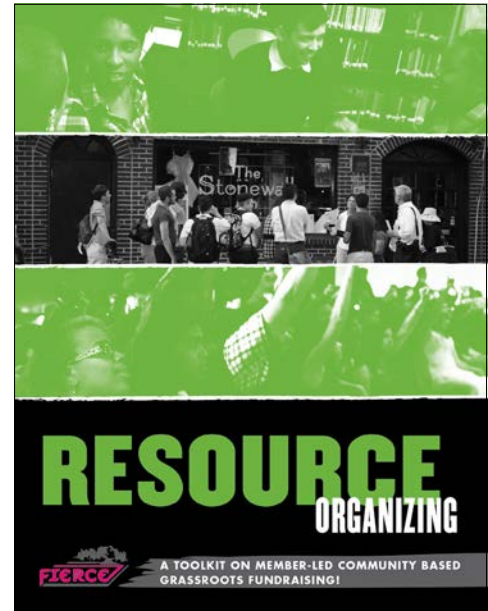
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RoadMap consultant Margi Clarke breaks down data from the recent Wages of Peace and Justice report, calling into question why folks working for social justice earn less than their nonprofit counterparts.



ON OUR COVER
FIERCE Staff Team at the 2012 “Musicals” Bowl-a-thon. The Bowl-a-thon is a youth-organized grassroots fundraising event that brings together over 150 community

members to raise \$32,000 to build the leadership and power of LGBTQ youth of color in NYC. To learn more and support FIERCE’s 2013 Pink and Black Bowl-a-thon, please visit fiercenyc.kintera.org/2013bowl.



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Investing in Ourselves and Each Other

By Ryan Li Dahlstrom

AS MANY OF US ARE SAD TO SAY GOODBYE to the warm weather, time off, and slower summer season, we welcome the beginning of a busy and exciting fall fundraising season. Many of us are preparing for fast approaching grant deadlines and end-of-year reports along with fall events and end-of-year fundraising campaigns.

We are collectively heartbroken and outraged by some of the many tragic losses and injustices over the past year, including the death of Trayvon Martin and the acquittal of George Zimmerman, as well as the sentencing of Chelsea Manning. While we have many things to be upset about, we also are celebrating recent wins like the Campaign for Prison Phone Justice that the FCC approved to lower phone rates for prisoners, and New York's historic legislation passed to ban profiling and establish independent oversight of the NYPD.

This issue of the *Journal* is dedicated to YOU: people who have written letters, met with decision makers, spoken out at rallies, organized and mobilized your base, educated allies on key issues, and built resources to support our work for social justice. Without you, we wouldn't be celebrating these recent wins.

Whether it be organizing for policy change or fundraising for a fall event, leadership is key. So many people in our organizations and communities, whether they call themselves it or not, are leaders. Too often we don't invest in these leaders or support their development, political education, skills-building, and growth. This support is crucial given the large number of fundraisers who are often working in isolation and burning out.

This issue centers on the theme of "Investing in Your People." If we don't invest in one another, who will? We must begin with the people in our own communities and organizations. It is not only a commitment of time, but also of resources. We deserve to be supported and compensated for the work we do as fundraisers and organizers.

In this issue, we first hear from Margi Clarke about a recent national survey on staff salaries within social justice organizations and how staff in our organizations are not adequately compensated for their work. Next, we look to FIERCE's leadership development model as a way for members to do grassroots fundraising and grow their leadership skills. Then, we share perspectives and generative ideas from fundraiser-organizers based on their experiences in development. Last, we leave you with some thoughts from some of our stakeholders about the recent CompassPoint and Haas, Jr. Fund report, *Underdeveloped*, about current challenges in nonprofit fundraising.

As we reflect on the past year and begin planning for 2014, we hope you will take time to celebrate your victories and all the people (and leaders!) who made them possible. And as always, please share your thoughts on this issue and don't hesitate to contact us with future article ideas.

In struggle,

Ryan Li

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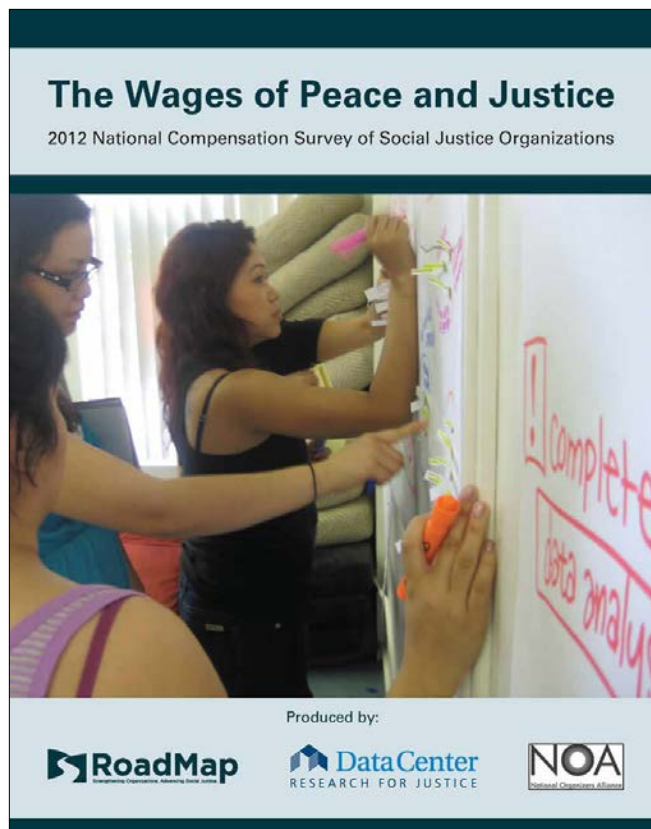
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Pay Equity in Social Justice Movements

How Are We Balancing Resources & Our Values?

Margi Clarke, RoadMap Consulting



GOOD LEADERS KNOW THAT PEOPLE are our movements' most important resource, and thus staff well-being and longevity are essential to our groups' success and impact in the world. Compensation practices are one of the most important but unexamined tools we use to recruit and retain talented staff.

A 2012 national study, *The Wages of Peace and Justice*, presents the salary and benefits policies of over 200 organizing and advocacy groups working for immigrant rights, environmental justice, LGBT issues, women's rights, and economic justice at the local, state and national levels. The study was produced by RoadMap, a national consulting network serving community based organizations and alliances, in collaboration with the National Organizers Alliance (NOA) and Data Center. The study and companion discussion guide offer important information for social justice and philanthropy groups to foster more sustainable, transparent and supportive compensation practices.

We know that the social justice sector is not funded as well as the overall nonprofit sector. On average in the last five years,

just eight to fourteen percent of grant dollars went to groups addressing the root causes of economic, social and environmental injustice.¹ Social justice groups suffered large budget cuts due to the recession, and most are still facing reduced or stagnant income trends. How are these trends affecting compensation practices in the sector? How well are we treating the people who tackle our most pressing issues of poverty, discrimination, war, and climate change?

AT A GLANCE

- \$3B** Average annual funding for social justice from 2008-2010
- 15%** Share of grant dollars made with a social justice purpose from 2008-2010
- 8%** Average foundation share of giving coded as social justice philanthropy
- 3%** Median foundation share of giving coded as social justice philanthropy

Source: National Center for Responsive Philanthropy

Salary Levels Less than Overall Nonprofit Sector

Low pay is a perennial challenge that results in turnover and contributes to stress levels of people engaged in very challenging and demanding work in traumatized communities. The average annual pay for community organizers is just \$37,000, while a living wage for one adult supporting one child is \$47,000 to \$49,000 in California or New York, and \$40,000 to \$43,000 in Texas, Florida or Colorado.

Organizing by its nature is most successful when we build long-term relationships, but how can this happen when the pay scale for organizers makes it unrealistic for them to stay at their jobs for the long haul?

Overall salary levels for social justice organizations surveyed are 15 to 45 percent lower than the overall nonprofit sector, depending on the position, organizational budget, and region. The RoadMap survey reports that executive directors in social justice groups are earning on average \$67,000 per year, community organizers \$37,000, and development directors \$53,000.

Executive director pay averages \$50,000 in social justice groups with budgets under \$500,000 to \$98,000 for groups with over \$2

¹ foundationcenter.org/gainknowledge/research/pdf/keyfacts_social_2011.pdf

million budgets. Comparison sector-wide salary surveys show executive director salaries average over \$120,000 and \$78,500 for nonprofits with budgets under \$500,000.

Many organizers and social justice leaders are driven by a deep sense of purpose and personal responsibility stemming from their own experiences of discrimination. As they are often hard hit by societal challenges, organizers' workload and work stress are high, with burnout and quick turnover the predictable results. We see a hesitance among the younger generation to step into leadership positions. Indeed, low compensation levels are troubling from both ethical and strategic perspectives as they pose a great threat to the resilience and longevity of groups we count on to lead systemic social change.

Reflecting Our Values

Despite limited resources and low pay, the study reveals social justice groups embed their values in their compensation practices. For example, the gap between highest and lowest paid staff is under a 3-to-1 ratio in 67 percent of the groups, and under a 2-to-1 ratio in 50 percent of the groups, whereas the nonprofit sector as a whole tends to replicate more of a hierarchical and corporate pay scale structure that creates a large gap between the highest and lowest paid workers. The pay ratio and other values-based policies in raises and family-friendly benefits are outlined in RoadMap's companion guide to revising compensation policies. The guide and salary survey are great resources to spark dialogue about your organization's practices, offering examples of progressive approaches in setting salaries, providing benefits, and making decisions about compensation.

Unfortunately, while the close ratio of lowest to highest pay is admirable, especially compared to the for-profit sector, organizer salaries still lag behind others in social justice movements.

Pay Ratio Between Positions by Organization Budget	Executive Director	Community Organizer	Salary Ratio
Budget under \$500,000	\$50,000	\$32,250	1.6 to 1
Budget \$500k-\$1M	\$65,500	\$38,000	1.7 to 1
Budget \$1-2 Million	\$80,000	\$40,000	2.0 to 1
Budget over \$2 Million	\$98,000	\$40,000	2.5 to 1

As budget size and executive director pay increase, organizer salaries increase at a much lower rate and remain below living wage levels.

Philanthropy Trends

There are some indications that funding to empower underserved groups is increasing slowly, from 12 percent of grant dollars in 2004-2006 to 15 percent in 2008-2010, according to NCRP's report on *The State of Social Justice Philanthropy*. But The Foundation Center predicts that unless philanthropy sees five years of above average investment returns, social justice grant making in 2015 will remain below 2008 levels.²

Generous Fringe Benefits

While salaries are constrained, social justice groups offer more generous benefits packages including several kinds of "family-friendly" policies. Eighty percent of groups pay the full cost of employee health insurance, and close to 40 percent pay the full cost of dependent and spousal health coverage. Fifty-seven percent of groups provide domestic partner benefits eligibility, including overcoming barriers of state and insurance law that prohibit equal

Health Insurance & the Impact of Obama-Care

It is not clear if the federal "Patient Protection and Affordable Care Act" will significantly help contain costs for nonprofits. Some small employers, including nonprofits (those with 25 or fewer employees and average wages of \$50,000 a year or less), will be eligible for a partial tax credit. The full credit is only for those employers with 10 or fewer employees with annual average wages below \$25,000.

Employers must pay half of health insurance premiums for employees to be eligible for the credit. However, the tax credit available to nonprofits is smaller than that of for-profits: 25 percent of the employer contribution for employer premiums until 2013, compared to 35 percent for for-profits; and 35 percent beginning in 2014, compared to 50 percent for for-profits. Some organizations will be able to begin providing employee health insurance or to increase their current contributions. Some observers say that the wage caps will threaten nonprofits that are trying to provide both adequate salaries (in most areas \$25k is not a living wage) and health benefits. Further, the question of whether the tax credit will compensate for ongoing dramatic cost increases in the insurance market remains.

(Source: www.wucpas.com/news/article/)

² foundationcenter.org/media/news/20111117.html

health coverage for same sex partners. Fifty percent offer paid parental leave beyond state mandates.

Pension contributions, vacation, sick time, severance pay, sabbaticals, and coverage for part-time workers are more generous than the non-profit sector norm, and are more generous than most private sector jobs.

But many groups still feel they are unable to offer attractive packages, especially as health care costs continue to rise. Groups surveyed report spending up to 35 percent of every compensation dollar on fringe benefits. Nearly 24 percent of groups report their total benefits cost between 25 to 29 percent of total salary costs, and 6 percent of groups report costs over 35 percent of salaries (including employer paid federal taxes of about 12 percent). The survey showed that a quarter of groups are facing salary and/or benefits cuts in 2012-2013.

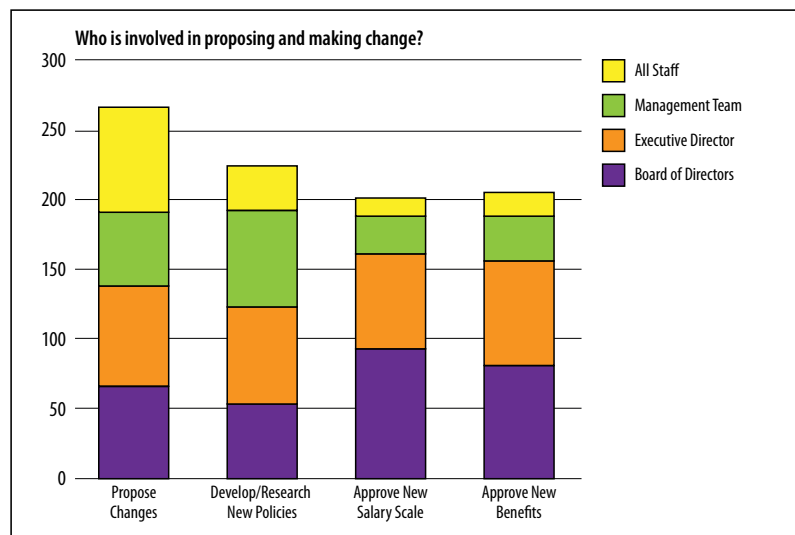
Shared Decision-Making

Many social justice groups are transparent and democratic in decisions about compensation. For example, staff and management

every three years. Use this study and other local nonprofit salary surveys to compare your policies to the wider trends

- Consider creating a team to guide the staff and board through a comprehensive look at salary scale, benefits and decision-making around compensation. Use the Salary Policy Discussion Guide to help bring everyone to the same understanding of the underlying assumptions and values built into your policies.
- Talk to your donors about how you are trying to bring all staff to living wage standards and provide family-friendly benefits. Their support is important in ensuring the sustainability of staff and success of your programs.
- Share your perspectives with your allies, and suggest dialogues about these practices in coalitions and funder convenings you participate in.

Contact RoadMap if you have experience or tools to share, or want to participate in our online webinar series on human resources practices from a social justice perspective. Send comments to Margi@RoadMapConsulting.org



team members can propose salary and benefits changes in more than half the groups and have approval roles in about a quarter of the groups.

However, 56 percent of groups reported not having “established salary scale or written salary policy.” It is hard to have fair standards without having well-understood policies and regular review of practices.

Recommendations for Social Justice Groups

- Take the time to look at your compensation package at least

Conclusion

We hope this report will spark dialogue within and across organizations in the social justice sector to find new and creative ways to support, develop and sustain our most precious asset: our social justice workforce. We hope it also nudges philanthropy to increase funding levels to support more sustainable compensation in the social justice sector in line with what it really takes to win on our issues.

The Executive Summary and full report are available from RoadMap, along with a companion discussion guide and other resources. The Summary is free, and the full PDF report is available for \$50 for groups with budgets under \$500,000, which helps to defray the research and production costs (email Margi@RoadMapConsulting.org for a coupon code). Many thanks to the pro-bono efforts

of RoadMap, DataCenter and National Organizers Alliance that made this project possible. ■

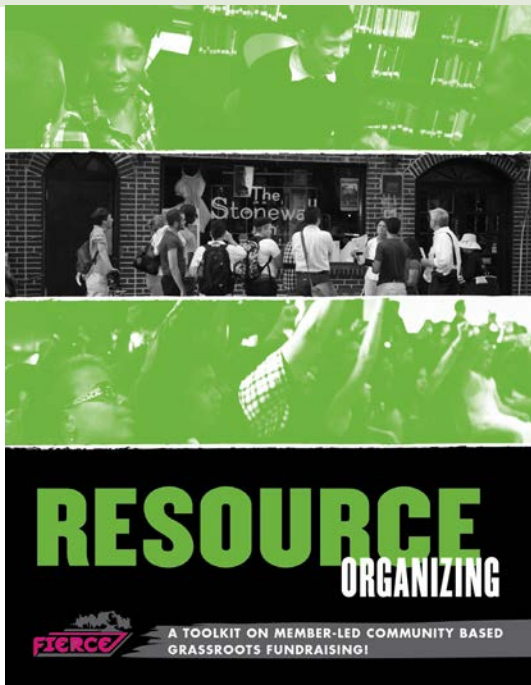
Margi Clarke is the author of *The Wages of Peace and Justice* compensation survey. Margi’s background is in immigrant organizing, environmental justice, and cooperative businesses. She also has 15 years experience as an organizational development consultant. RoadMap’s mission is to strengthen social justice organizations and the social justice sector through capacity building, peer learning, and field building.

Developing Member Leaders

The FIERCE Model

“Grassroots fundraising helps members take initiative and be active in the work that we do. Through the process of fundraising, members grow and push themselves to be leaders. Often times, members are scared to do fundraising at first because we feel like we’re not qualified, but since doing major donor fundraising I’ve learned that anybody can be a good fundraiser. I’ve also learned that there are people outside the room who care about what we do and who we are. Donors are not robots or ATMs—they are just as invested in our work as members of FIERCE, it’s really inspiring and empowering.”

—L. Francois, FIERCE member and Major Donor Intern 2009



To purchase a copy of FIERCE’s Resource Organizing Toolkit please visit fierceny.org or email Development Director Naa Hammond at naa@fierceny.org. Toolkits are available to organizations at a sliding scale rate.

THE MOST SUCCESSFUL PART OF OUR FUNDRAISING model has been the leadership development component. We attribute this to already having an established leadership development program in place, the Education for Liberation Project (ELP). ELP is a comprehensive training program that takes members through a process of deepening political education and organizing skills-

building, and then providing hands on opportunities to practice those skills and analysis through leadership roles in the organization. Our Leadership Development Model (see page 6), breaks down each level of the ELP program and the skills, training, and practice that members engage with at each level.

In ELP1, members are introduced to FIERCE’s political framework, anti-oppression analysis, and organizing model. During ELP1, members are exposed to workshops on racism, classism, capitalism, LGBTQ radical history, and youth organizing, among many others. By creating a shared understanding of intersecting systems of oppression and the resistance efforts of oppressed communities throughout history, we set the stage for FIERCE members to become organizers and radical grassroots fundraisers.

Once they graduate from ELP1 members can move on to ELP2, which focuses on building their skills in community organizing. Grassroots fundraising analysis and skills are incorporated into ELP2’s curricula and presented as part of a larger set of community organizing skills. In ELP2, members learn fundraising alongside base-building, campaign development, and media skills.

After ELP2, graduates move on to more advanced leadership roles in ELP3 and Fellowship positions. At this level, FIERCE provides paid fundraising internships and fellowships where members learn to coordinate nearly all aspects of our grassroots fundraising strategies, with the support of staff.

Our Leadership Development model ensures that by the time members take on significant leadership roles in fundraising, they have a solid grasp of FIERCE’s anti-oppression values, and hands on experience in our campaigns, base-building, media, and youth development programs.

To help you understand how we train and support members in fundraising see our Grassroots Fundraising Leadership Development Chart on page 7.

fierce's leadership development model

Education for Liberation Project (ELP): A leadership development program that builds conscious organizers through a paid internship of political education and organizing skills.

elp 1

- Objectives:**
- Introduce members to youth organizing and anti-oppression framework
 - Build a foundation of political education
 - Expose members to FIERCE's politics.

- Structure:**
- Run 2 cycles a year.
 - Each cycle is 3 days a week for 4 weeks (total of 12 days)
 - Each week is themed, with a different political education topic

- Content:**
- Orientation to FIERCE & relationship/trust building between members
 - Intro to Organizing (movement history and youth organizing 101)
 - Anti-oppression 101 (intersections of racism, homophobia, ageism, and gender oppression) and allyship.
 - Global justice & US Imperialism
 - Prisons and the education system
 - Safe space and gentrification (in relationship to FIERCE's campaign work)

- Retention Strategies:**
- Connect by building strong relationships between the ELP1 cohort and to FIERCE.
 - Empower & Agitate through relevant and interactive political education sessions.
 - Increase Engagement with FIERCE through one on ones and leadership opportunities.

elp 2

- Objectives:**
- Introduce members to organizing skills
 - Support members in the application of organizing skills
 - Engage members in more advanced political analysis education

- Structure:**
- Run 2 cycles a year
 - Each cycle is 3 days a week for 8 weeks
 - Each week is a mixture of political education workshops, skill trainings, and application days

- Content:**
- Relationship/trust building
 - Campaign development & power analysis of current campaign work
 - Base building, effective outreach and recruitment
 - Grassroots/Major Donor fundraising
 - Workshop & meeting facilitation
 - Two advanced political education sessions

- Secondary Skills:**
- Public speaking
 - Event planning
 - Direct action strategies
 - Media communication

- Responsibilities of ELP2:**
- Organize Let's Politik! (political education discussion for FIERCE members)
 - Organize FIERCE Friday events
 - Do street outreach and phone banking
 - Participate in major donor visits
 - Support campaign work

elp 3

- Objectives:**
- Support members in applying organizing skills in a program area of FIERCE
 - Engage members in more advanced political analysis education

- Structure:**
- Cycles run year-round
 - Run 4 cycles of 3 months each
 - 2 interns are responsible for 1 program area
 - Program staff directly supervise interns

- Content:**
- Each intern is responsible for one of the three following program areas
- Campaign Steering Committee
 - Grassroots Fundraising
 - Outreach & Base-building

- In addition to their responsibilities in their program area, members also participate in:
- weekly staff meetings and check ins
 - monthly political education study group
 - monthly relationship building activities
 - Coordinating committee report backs at the member meetings

- Retention Strategies:**
- Support the leadership development of members through regular one on ones
 - Encourage members to re-apply to ELP 3 to take leadership in another program area
 - Establish supportive working partnership with program staff and member

Grassroots Fundraising Leadership Development Chart

INTERMEDIATE GRASSROOTS FUNDRAISING TRAINING

This level of development focuses on providing in depth grassroots fundraising training for ELP2 interns with an emphasis on Major Donor fundraising skills & practice. Only ELP1 graduates that are accepted into ELP2 are eligible for this level.

What kinds of training & support are offered? An entire week of ELP2 is spent training interns on grassroots fundraising and major donor fundraising. These trainings prepare them for an actual Major Donor visit that they facilitate at the end of the week. Within this week of training, interns receive a daylong Introduction to Grassroots Fundraising training and a half-day training on How to Run a Major Donor Meeting. Interns are then split into groups of 5, and given time (1 ½ days) and instruction to help them practice and prepare for their major donor meetings.

What fundraising leadership opportunities do members have at this level? ELP2 interns plan and execute a Major Donor visit on their own. Each year, ELP2 interns raise over 3,000 for FIERCE through these meetings.

What are members' Roles & Responsibilities at this level? ELP2 interns plan the meeting agenda, prepare all the materials and Major Donor packet, and facilitate all aspects of the meeting including the Ask. All interns in the meeting play a role and talk about an aspect of FIERCE's work and/or their experience as a member. Interns execute the meeting with very little staff involvement.

* It's important to note that at this level, staff coordinate the logistics of the Major Donor meetings, including reaching out and communicating with the donors beforehand. Staff usually sit in the meeting to provide moral support for the members, but do not participate except during introductions and closing. Staff are responsible for taking notes of any follow up steps that come up in the meetings as they take up follow up work from that point on.

ADVANCED GRASSROOTS FUNDRAISING TRAINING & EXPERIENCE

This level of development focuses on providing advanced training for interns in ELP3 and Fellowship positions. Interns at this level are given high levels of responsibilities and function as part time program staff. Only ELP2 graduates are eligible to apply for ELP2 & Fellowship positions.

What kinds of training & support are offered? Interns and Fellows are given advanced training on Major Donor Fundraising and event fundraising throughout their internships. They are also given support through staff supervision, assigned readings, and one-on-one coaching. Training topics include: steps to organizing a Major Donor Campaign, Phone banking, in-kind donation procurement, ad and sponsorship solicitation, outreach, acknowledgements, online fundraising, etc.

What fundraising leadership opportunities do members have at this level? Major Donor Campaign Coordination, Bowl-a-thon Coordination & Special Events Coordination.

Roles & Responsibilities: Major Donor interns are responsible for learning and executing all aspects of the Major Donor Campaign. They are supported by Staff in performing their duties, but are responsible for high levels of leadership in the campaign including creating the campaign launch invitation card, tracking all renewal donors and prospective donors, creating call sheets and making all outreach calls/emails. They schedule major donor meetings, they create the meeting agendas, they recruit, train, and prep volunteer members participating in the meetings, they update all donor records, and write all thank you cards to donors.

FIERCE Bowl-a-thon & Special Events Fellows have high levels of responsibility and leadership. They are responsible for co-coordinating and executing all aspects of the event fundraising. In the case of the bowl-a-thon, FIERCE Fellows are responsible for all aspects of coordinating volunteers, planning the event logistics and program, developing the event theme and title, developing outreach and recruitment materials, soliciting ads and sponsors, creating the program book, procuring prizes and donations, and supporting team captain recruitment and outreach.

INTRODUCTION TO GRASSROOTS FUNDRAISING

This level of development focuses on exposing new members, members who have not gone through ELP, and ELP1 interns to FIERCE's fundraising model and introducing them to basic grassroots fundraising skills & analysis.

What kinds of training & support are offered? Members gain exposure to FIERCE's fundraising model through new member orientations and general member meetings. We also offer an annual Intro to Fundraising training that is open to all members, board, and staff.

What fundraising leadership opportunities do members have at this level? All members, even members who have not gone through ELP2, are encouraged to volunteer for the Bowl-a-thon and Major Donor Campaign. If a member becomes a fundraising volunteer, they will build their skills through mini-trainings and preparation meetings run by members in the advanced stages of development. In addition, they will gain skills through getting hands on practice.

What are members' roles & responsibilities at this level? Members at this level do not have high levels of responsibility, but they are encouraged to take part in and support FIERCE's fundraising work. If they volunteer they may have opportunities to participate in Major Donor meetings, help with Bowl-a-thon organizing, and join or start a team for the bowl-a-thon and raise money for FIERCE.

FUNDRAISERS

GIVEN HOW ISOLATED and overworked fundraisers often find themselves, it is not surprising that the average length of stay on the job is a mere 16 months.¹ GIFT asked several fundraisers of color to reflect on their experiences working in development as a way to identify challenges, celebrate success, and move us towards creating work spaces where fundraisers get the support and recognition they deserve.

1. How did you come to development work?

Somewhat on accident. I never thought I'd work in development. Really. An organization I trusted reached out, and each of us took a chance on each other.

Over ten years ago, I was a program staff person earning a wage

I fell into development completely by accident.

that was not enough to support my family. The only chance I had in changing that at the time was raising more money for the organization so that it could create a position that would pay better. Thus, the organization's first development director position came to be, and that was the first time I was a full-time development person. I still had my

program development and direct services duties, but my title was development.

I came to development work because of a desire to work for a social justice organizing group in any way I could. Development was what they were hiring for.

I joined the Development Committee at the nonprofit where I worked while still a program coordinator. The committee included the executive director, a board rep, and the development director. It was open to any staff so I signed up with hopes of gaining new skills and accessing more decision-making power and influence within the predominately white and mainstream organization. Of a staff of over 20, I was the only program person to show interest. Together with the development director we convinced the board to join the

Benevon program, another individual fundraising model. The four of us attended their training and I was hooked on the science of cultivation and the "ask."

I knew I wanted to work for social change and that I wanted to be behind the scenes. A speaker came to my class and described fundraising as a way to build power, and I thought, "Hey, I could do that."

I fell into development completely by accident. Since I was in high school, I have done lots of little grassroots fundraisers to raise money for my clubs and organizations, but it was never my passion—just a necessity to support work I cared about. I became the development associate at my organization because the position opened up and I wanted to work there.

I never thought I'd be a development director. I started out doing support and then eventual program work for a major nonprofit organization in the U.S. My path led me to positions in development when I started to study the subject of sustainability and its role in grassroots base-building organizations where I came up against a sad reality that none of these necessary organizations could exist without fundraising.

Having only previously worked in the for-profit/corporate sphere, I made an intentional decision to pursue my master's degree in public policy and begin a more socially and politically responsible career path. I was drawn to my current position in development primarily because of the work [my organization] does. [My organization's] mission and its record inspired me, so I jumped in wide eyed and eager to be part of a team that was working to support social change in the city I grew up in.

2. Please describe the orientation you received when you started your development job, and identify the most and least helpful aspects of it.

The orientation I had at my last development staff position was excellent. It was primarily provided by the outgoing development director who has decades of development and philanthropic experience. In addition, all of the management staff contributed to my orientation in various ways. The least helpful aspect was the unrealistic financial goal-setting, but that aspect improved after a couple of years.

I didn't receive an orientation at my current job, because my predecessor had left the position two months earlier. This was both

1 <http://philanthropy.com/blogs/prospecting/the-cost-of-high-turnover-in-fundraising-jobs>

ANONYMOUS

very helpful—allowing me to create my own plans from scratch—and very challenging by not having someone to explain and decode what had already been done or planned.

Orientation? It was really trial by fire. My predecessor had transitioned out several months before, and we were a month away from our big gala fundraiser event. I was given a giant binder of notes from my predecessor, copies of the *Grassroots Fundraising Journal*, and some orientation to our donor database.

I didn't receive much of an orientation. I was tasked with setting up development systems, and given the green light to approach whoever in the organization I needed to track down the information to put into the systems. At one point I received some very simple grant writing instructions. The instructions were to literally restate the question asked, and answer it as directly as possible. This was helpful.

My fundraising training was primarily hands on and experiential. My start date coincided with the prep and implementation of our fall appeal, so I needed to quickly learn our organizational best practices. My strategy was to just listen and watch my supervisor. I needed to see how the team had previously managed campaigns so I could understand where we needed to improve our

process. This approach was helpful because I believe the best way to learn is by doing. I was able to retain a lot of information about our organization as well as our donors early on by being thrust into projects.

This approach was a bit challenging for the same reason it was helpful. There was so much strategy and backstory to our process that it was often very daunting to think about everything that I needed to do considering I didn't have much experience to manage the project with. Outside of fundraising, I received a relatively in-depth training on our donor database. Managing the database also fell under my list of responsibilities, so it was important that I had a firm grasp on our standards and procedures. I was also

encouraged to seek out training opportunities outside of our organization, one of which being the 2012 GIFT Conference in Oakland, which was extremely helpful in giving me background on fundraising best practices and an opportunity to build community with other fundraisers around the country.

I transitioned from a program director role to my current position, so there was not any formal fundraising orientation. I have been active in the organization's grassroots fundraising efforts as a co-executive director since 2009.

Clear instructions were very helpful. Feedback was helpful.

On the one hand, it was nice to have the space to learn on my own. On the other hand, formalized or intentional training would have grounded me and seeded confidence. The absence of this training bred a looming insecurity in my work; I'm working to counteract that—or just let it go.

I didn't receive much of an orientation. I had to piece together what was going on with their fundraising by running reports from the database and searching through their grant files. A chart showing their fundraising activities from the past two years, the outcomes, and some tips or background information would have been extremely helpful.

My strategy was to just listen and watch my supervisor.

Orientation? It was really trial by fire.

3. What has been most rewarding in your work?

My organization organizes low-income Asian communities. My favorite part of my job is doing yearly grassroots fundraising trainings with members. I like to see fundraising as an organizing tool to help build community investment in sustaining the organization. Training our members helps me strengthen my political philosophy around fundraising and reminds me how fundraising can be fun and inspiring.

Providing tangible added value to the organization and its program work has been rewarding. Much of the work I do is behind the

**We are passionate,
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There is dignity in what
we do.**

scenes and pretty invisible. Informing program planning and design, and helping staff articulate their work in focused and passionate ways makes me feel good. I'm most gratified when my colleagues say, "Thanks for guiding me through that. My work is clearer to me now."

Training others to do grassroots fundraising is very fulfilling.

I would have to say that I feel extremely rewarded when we put on a campaign or event that our audience truly enjoys. Two things that come to mind are the continuing success of our capital campaign and our 2012 community gala. Both of these are examples of projects that I spend a large portion of my time on and have been well received. I also feel extremely rewarded when I see or hear our grantees share with others how helpful [our organization] has been to their work and grassroots movements. Hearing feedback from our grantees really helps to refocus me at times and puts the work that I do back in perspective, especially when I'm caught up in the details of a project.

Utilizing fundraising strategies as a way to engage people around issues of shared concern. Yes, the money is necessary, but the real juice is connecting with people.

Two moments come to mind. The first was an individual donor ask I set up with a relatively new donor. I did not know their background or much about their capacity to give. I had planned to ask for a \$1,000 gift to use as a challenge at an upcoming special event. We had a very engaging and passionate conversation about many social justice issues. Everything was going well. Before I could ask for a specific gift, the donor said, "I'm going to write you a check for \$10,000 today." I was completely floored! It was such a gratifying moment to know someone cared enough about our work to give such a large gift.

The second most rewarding experience would have to be coordinating an online giving campaign with a team of 16 fundraisers. I really enjoy sharing my passion for fundraising and supporting others to succeed. I've found that the team effort and the online

platform reduce many of the barriers people face with individual donor asks.

What's most rewarding is knowing that an organization that I am on the board of has been very successful in maintaining our mission for fundraising where the work and needs of our community fuel and direct the fundraising and not vice versa.

The most rewarding experience is when you see a volunteer give an amazing pitch for the organization.

4. What has been most challenging?

One of the most challenging aspects of the work is having to ask year after year and feeling pressure to come up with increasingly creative or innovative ways to ask and motivate people to give.

Developing leadership and commitment from multiple staff and board to actively participate in individual donor asks and cultivation meetings has been extremely challenging. Most people do not follow through with setting up meetings even after we provide training, detailed prospect lists, and offers of one-on-one support. I think we need to find more ways to explore the ways internalized oppression and socialization around money act as barriers to engaging with donors. We are considering designating two months next year, one in the spring and one in the fall, as "Donor Ask" months to create a sense of team effort and support for the board and staff.

Having limited programmatic and communications responsibilities has been challenging.

It's been challenging to adjust my communication style. [My organization] has a very individual, high-touch approach to fundraising. This type of strategy requires you to not only be on top of your donor background information, but to also be high energy and chatty when communicating, especially in written form. Coming from my previous work background I had to be very aware of my tone in emails coming across as too business-like or formal. These weren't major challenges but they were skills I had to master.

It's difficult when people approach fundraising as inherently stressful.

Time. My organization has a growing budget and base. I have a lot of asks of my time that aren't strictly development from supporting communications, technology and other work. I am constantly being pulled in all sorts of directions. Because of time, I struggle with trying to build organizational investment in grassroots fundraising and communications. I think our staff believes in grassroots fundraising and communications in principle, but most staff members don't feel like they have the time to prioritize it.

Secondly, I get bored. My job involves a lot of data entry and writing routine appeal and thank you letters. After two years, I feel like I need new challenges to keep growing. I find entry-level development jobs are rarely interesting enough to be sustainable.

Clarifying my role in an organization that did not previously have a development department has been difficult. Second, building a culture around development that breaks down the walls between programmatic and support teams (like development).

Before I mention either of these, I should say: feeling like I belong here. Development wasn't in my professional plans, and much of what I've learned has been by the seat of my pants. On low days, my lack of formal training is an insecurity that holds me back. Being part of a community of development professionals could counteract this.

When development is perceived as separate from program work, it hurts all of us in very basic ways. It prevented me personally from preparing mentally and professionally to do both. From the perspective of industry culture, it's been difficult to validate my work, get the resources, and build needed infrastructure in the face of a nonprofit mentality so weighted in fixing things outside of the organization (e.g., societal injustices) that the health and sustainability

of the organization itself is neglected. My job is to make sure that my organization is healthy and has the resources it needs to fulfill its mission. To do that, my organization needs to be willing to pause long enough to tune up and make the repairs necessary to keep the engine running smoothly and effectively.

I try hard to be bold when making my asks.

Then there's the misperception that development work is locked into money neediness, which makes development staff sleazy salespeople. Money is one part of the work, but there's so much more. Development staffers are far from sleazy, and none of the folks I've met have been salespeople. We are passionate, committed to justice, mission driven, hard working, and genuine. There is dignity in what we do.

5. What's the biggest fundraising mistake you have ever made, how did it get resolved, and what did you take away from the experience?

The biggest mistake I made was not following up and building relationships with major donors. We always said we would be better about contacting them and updating them regularly, but it somehow never made it on the top of the to-do list. Then asking time would come around again and I would realize that I hadn't contacted the donor since the previous gift. Big no-no! It hasn't been resolved and it's been eye-opening to realize how much more

awkward I feel around people who give large gifts compared to those who give smaller amounts.

My biggest mistake was not asking. Be bold in asking.

It's not so much a singular experience but more of a behavioral pattern that not only affected fundraising but my overall work. I had a profound fear of failure and feeling judged by those around me, and I allowed that fear to keep me from asking for help or admitting when I felt stuck. Once I learned, life got sweeter.

The biggest mistake was trying to apply a "table captain" format to an annual casual breakfast event after two previously successful years with a smaller event. While we raised more money than before, we were not able to effectively seat people with their captains and did not have a plan to feed almost twice the number of people! Sounds so ridiculous now, but we were experimenting and learning along the way. After that mishap, we shifted the event back to a casual, family friendly event and cooked food ahead of time to plan for larger crowds. The biggest lesson was to not assume any event can be more profitable. Some events are not meant to be huge fundraisers. This particular event draws a diverse crowd and continues to be a great "friendraiser" for us.

I honestly cannot think of a major fundraising mistake (knock on wood), but something that I definitely had to learn and make improvements on was my communication with team members regarding timelines, deliverables and expectations. I would say that during my first year, I was not as firm and communicative with my team and often assumed that people were on task with working to our agreed upon timeline. This caused confusion and frustration at times because team members sometimes felt that they did not know what was going on or what was expected of them. In my second year, I was able to be more organized about holding people (myself included) accountable and hitting agreed upon deadlines.

There were some egregious errors in mailings early in my tenure. Bulk mail is a tricky thing from placement of stickers to sorting envelopes. On top of it, I wasn't familiar enough with our database and donors to know how to make sure our mailing lists were in optimal shape. There were a lot of bounce backs. Over time, I have a much better idea about how long it takes to send a mailing, when we need to outsource to a mailing house, and how to check for quality control in lists and addresses.

The biggest mistake that I've ever made and one that I've made a few times has been asking too little when the potential to give more was there. After trial and error, more study, and information gathering, I try hard to be bold when making my asks.

I have made many small mistakes. They may have felt huge in the moment, but luckily they all turned out to be small. There's a lot of pressure on us, and a lot of expectation. It's easy to be hard

on myself. In the end, as long as I did the best I could (amidst all the competing demands and priorities), I try to let the mistakes go. People (and especially people of color) with development experience who are still willing to do the work can be hard to find. If we're too hard on ourselves we may not stay in development. We've got to stay and learn, and get great at it.

6. If money and time were unlimited, what would you like to see change for development staff?

Development staff are poised to advance and support a shift in organizational revenue models.

This is a tough question. I think a combination of regular professional development opportunities and fundraising technology for smaller organizations would be helpful. There are so many strategic ap-

proaches to fundraising that I think having the opportunity to regularly check in with others about what's going on would be extremely valuable.

I'd like to see development staff work together to create new cultures of giving and asking in a movement oriented way.

First, I would hire a part-time grants manager and admin support staff. That would free up much of my time to focus on grassroots fundraising. I would like to attend trainings on establishing relationships with foundation funders, developing major donor programming, and capital campaigns. Thankfully, our board has doubled in size and is actively supporting fundraising.

The creation of the perfect affordable database. For everyone to have access to good financial advice and planning, and for donating money and paying their fair share of taxes to be part of everyone's budget. For strategic planning consultants to band together and convince foundations to accept unsolicited proposals. To have curriculum in high schools that talks critically about wealth, poverty, the class structure, taxation, the common good, nonprofits, and philanthropy.

Training: Grounding in training is vital. This training would ideally include philosophical grounding (a framework for our role in social justice work, and a code of ethics for development profes-

sionals), training in fundraising planning and strategy, practice in individual donor and grant cultivation, and an integration of organizational and program development.

Organizational infrastructure: A team approach to development that involves the entire staff. Staff buy-in, and clear roles and responsibilities between program and development staff can help build a strong development culture.

Information management: One of the invisible aspects of development work is all the information we manage. It's a lot of work that should be acknowledged and supported with staff time.

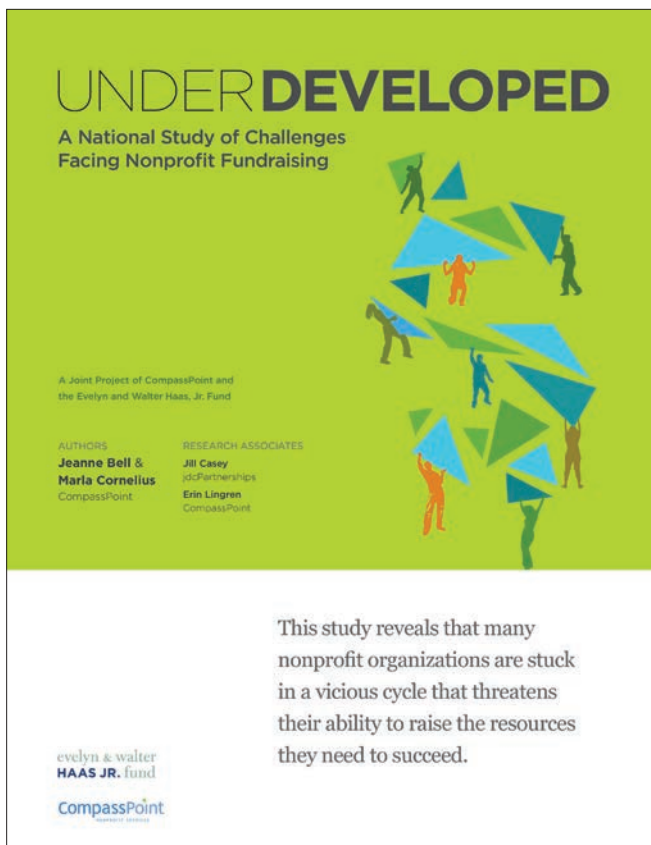
The more I see how development and nonprofits work, the more concerned I am about the sustainability of traditional nonprofit models. Development staff are poised to advance and support a shift in organizational revenue models. How can we evolve our models to keep our doors open with more consistency, longevity, and self-determination? I don't know the answer, and I do have a feeling that there's opportunity for positive change here. With the resources to explore these opportunities and pilot new ideas, we might be able to truly lead the conversations and direction of our work with fewer barriers.

I want to see more investment in communications and development capacity building. To really sustain our movements from the communities we serve and spread our message wider, I would love to build deeper staff capacity and buy-in. Then the development and communications positions would be more of trainers and facilitators than lonely workhorses.

I'd love to see all lead development staff at any given organization be a multi-person position—so I guess, shared leadership of development directors AND a person committed to data management who LOVES it! And, if both time and money were unlimited I'd love to be able to better balance my work life with my home life—spending 65 percent of my time and energy with my family and friends and another 25 percent of my time and energy on my work...with the remaining 10 percent for me.

It seems to me that VERY few people truly enjoy fundraising in and of itself, which I think may explain why it's so difficult to successfully fill development positions. I think the sector needs to reimagine how we can fulfill the fundraising needs of an organization without putting the bulk (and usually the most boring elements) of the work on development staff. Development staff work best when they feel like they have creative, meaningful engagement with the organization's cause as a whole. ■

Have a comment or reaction to what you've read? Please join the conversation (anonymously or not) at grassrootsfundraising.org/fundraisersanonymous.



Underdeveloped

Real Talk from GIFT about Challenges in Nonprofit Fundraising

Here are a few of the key takeaways from the report:

- Development positions are the “hardest to fill and retain.”
 - There seems to be a “revolving door” and “high turnover and vacancies” within development positions.
 - “The supply of qualified development directors is smaller than the demand for them across the nonprofit sector.”
 - Development staff when asked “anticipate departure” from the organization and don’t see themselves working in development into the future.
- “So many factors influence an organization’s fundraising success that it’s hard to know whether or not the organization could raise more money with someone else in the position.”
- Many organizations “lack the conditions for fundraising success, specifically with regard to having a team of fundraisers.” These lacking conditions include board and staff engagement in fundraising, organizational fundraising/philanthropy culture, and fundraising infrastructure (i.e., database, fundraising plan, etc.).
 - Organizations need a strong executive director and development director partnership that supports development work.
 - Many executive directors report not having the skills and knowledge to secure gifts, and one in four stated “they don’t particularly like doing it.”
- Nearly all (89 percent) of development directors reported “only little or moderate influence on the engagement of other staff in fund development or on annual budgeting.”

Why is this? What is and isn’t working about nonprofit fundraising? This report helps to further elevate many of the questions and experiences we have been talking about for some time.

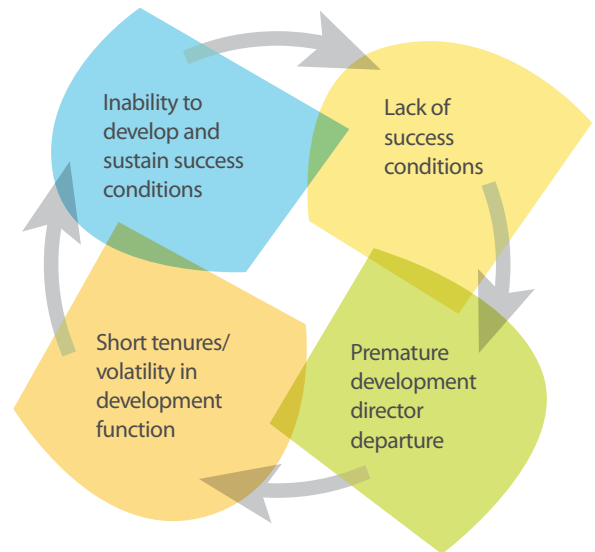
BUILDING AND SUSTAINING THE RESOURCES we need to advance social justice movements can be daunting but also rewarding. Having our communities rally behind us and leverage resources to support the causes we believe in is undoubtedly a powerful act. When we financially support projects we care about, we organize our collective power in service of our vision and values. Much of GIFT’s work centers on elevating the legacies of giving and resource sharing within working class communities and communities of color with recognition that many of our communities have been doing grassroots fundraising for generations, whether or not they have called it that. We believe that individuals and communities already have the skills they need to be fundraisers. They just need practice and support, including ongoing learning opportunities to deepen and refine these skills and strategies.

So what has changed over all these years? What is similar and different from these histories of fundraising to current day nonprofit fundraising? What can current nonprofit fundraising learn from these legacies? What current conditions make it more challenging to raise the funds we need to see the change we desire?

Development Field

A recent report entitled *Underdeveloped: A National Study of Challenges Facing Nonprofit Fundraising* published by CompassPoint and the Evelyn and Walter Haas, Jr. Fund sought to address the current sustainability challenges facing nonprofits in this political moment.

The Vicious Cycle



Given the findings of *Underdeveloped*, we asked people working in development (GIFT board members, *Grassroots Fundraising Journal* Editorial Board members, and some executive directors and development directors of color who we know and love) to share some of their thoughts and reflections on what they found most compelling from this report and what they felt was missing. Our hope is to leave you with additional questions and generative ideas to move forward with.

GIFT trainings and movement building work elevate the importance of investing in the leadership and professional development of fundraisers, the building of a fundraising team, and the creation of a culture of fundraising organizationally. These themes were reflected in the report.

GIFT stakeholders felt similarly and shared that while many of the statistics (regarding vacancy, transitions, and investments in development staff) were not news to them, the report highlighted how widespread these challenges are.

We asked each person, “What did you find most compelling about the report?” Here’s what they had to share.

“One of the most compelling things about the report was the documentation of some of the real challenges development directors face that we know anecdotally to be true, but is clear from the report that these challenges are quite widespread. This ranges from dissatisfaction on the part of executive directors and development directors with the job and/or performance of the development director, the high percentage of development directors who don’t see themselves staying in the field, and the lack of support or a sense that fundraising requires the engagement and participation of everyone in the organization in order to be successful.”

–Stephanie Roth, Consultant, Klein & Roth Consulting

*“I felt an odd sense of relief after reading *Underdeveloped*. For so long I’d internalized the perception that development positions were ‘revolving door positions’ all the while understanding that it couldn’t just be ‘bad fundraisers’ who had created this norm. The report not only spelled out the reasons for the ridiculous amount of turnover, it assured me that the problem does not (and should not) rest solely on the fundraisers’ shoulders. After this report, I think a lot more people in nonprofit organizations became aware that the assumption that a development director is solely responsible for ensuring the financial well-being and sustainability of an organization is completely unrealistic. We seriously need to disrupt the preconceived ideas and generalizations we have about how fund development can and should work.”*

–Bianca Escalante, Development Director,
Level Playing Field

“It was a great overview and very timely with the challenges that seem to keep deepening. I agree that creating a culture of fundraising seems easier at a small organization. We have no other choice with only a few staff and a small board. What I found most compelling was how many development directors and executive directors do not like asking for money. I would assume passion for the mission would go hand in hand with passion for fundraising for leadership. I was also shocked with how many boards do not raise any money.”

–Crystal Middelstadt, Resource Development Director,
Colorado Anti-Violence Program

“I have used the term culture of philanthropy everywhere since reading the term and its robust definition in the report. I think EBASE is well on our way there but it was great to have a term to coin regarding what successful grassroots fundraising is when valued across and up and down an organization.”

–Sadiyah Seraaj, Development Director, EBASE

What do you think is missing from *Underdeveloped*?

“The report had a narrow view of ‘a culture of fundraising/philanthropy.’ The frame I like to use regarding what it means to create a culture of fundraising/philanthropy is that fundraising is a form of engagement and organizing, that it’s one way among many [in which] people step up, get involved, and see themselves as making a difference in the world. It’s not the only way people make a difference, and sometimes we lose sight of the fact that people want to be more than a source of funds to the organizations they support. But if social change comes about because people stand up and say, ‘No, something’s wrong with the status quo, and I’m going to be part of doing something about it,’ then giving money, time, skills, connections, etc., is part of it all. In that view, fundraising is not a

compartmentalized and technical job that is relegated to the back office. The report really didn't touch on this."

—Stephanie Roth, Consultant, Klein & Roth Consulting

"What is needed is nothing short of a paradigm shift, and while the report did offer some tips for how to begin this process, I didn't find enough concrete examples of what organizations can do. Our organization was successful in getting people to understand that fundraising is important and that everyone in the organization can play a role. However, while the report spoke to fundraisers and even executive directors and board members, it left out the basics of how to truly contribute to fund development from a program staff perspective."

—Bianca Escalante, Development Director,
Level Playing Field

"I would also love to see more on tips to create realistic goals and support for board fundraising, barriers to entering or staying in the profession for people of color, LGBTQ, and other marginalized communities."

—Crystal Middelstadt, Resource Development Director,
Colorado Anti-Violence Program

Broadening Success

GIFT would love to deepen conversations that broaden the notion of success and sustainability within the field of development and movement building. GIFT Board Member and Pyramid Arts Center Executive Director Jose Dominguez states, "What does success and sustainability look like when working from a mindset of abundance? What is enough and when is it ever enough?" Dominguez continues, "The way to change the field is to change the context of the discussion and the people at the table. That means training fundraisers of color and other traditionally disenfranchised groups so that they can participate in a sustainable, meaningful way. That means working with allies and veterans of the fundraising field who will serve as a bridge for new fundraisers. That is where I put my energy these days—hopefully getting to scale with new voices and allies to change the dialogue of philanthropy."

Moving Forward

There are so many things needed to move this dialogue and practice forward. It's work we must commit to for the long haul and requires individual and collective buy-in to change organizational culture and practice.

As we see many progressive funders closing their doors and foundation dollars in general dwindling or priorities shifting,

we must now more than ever look to each other, our communities, and closest allies to create more connection, interdependence, and resource sharing among our networks. Let us continue to identify ways to collaborate and provide mutual support to one another.

We leave you with these tips for continuing to build a culture of fundraising and a stronger team of fundraisers for your cause:

Talk about money, race, class, and power dynamics openly and honestly. Create space to recognize and address the money trauma and baggage we all carry in order to get over our fear of asking. As we work within multi-racial and cross-class organizations and movements, it's important to continue to normalize and make transparent conversations about money, race, class, and power dynamics that can make this work especially daunting. We can't expect people to succeed with their fundraising if we haven't built a foundation of transparency, trust, and sharing of personal experiences and internal/external barriers for different marginalized and disenfranchised communities.

Invest resources in your people. Key volunteers, members, leaders, and development staff need more opportunities to build their skills and knowledge in fundraising. The more people who can share this knowledge and skill set, the stronger your fundraising team and culture of fundraising will be.

Create more peer learning and sharing spaces for fundraisers. Executive directors and organizers often have spaces to come together to share, learn, and strategize. Fundraisers rarely do. Many fundraisers in the Bay Area (as well as other parts of the country) meet regularly to discuss challenges, share experiences, and information with one another as a way to build skills, create a support network, and break isolation.

Build stronger systems for support and accountability. Determine the best ways that individuals who are fundraising for the organization can be supported and held accountable for their fundraising responsibilities. Fundraising needs to be more collectively held across all roles in the organization as much as possible.

Advocate for fundraising technical assistance and capacity building support. The more of us who share with funders the importance of technical assistance and capacity building support for our fundraising infrastructure and development, the better. After all, we need resources to raise more resources.

Join the conversation online at grassrootsfundraising.org/underdeveloped.

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