

Grassroots Fundraising Journal

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A PUBLICATION OF



**Importance of Upgrading
Love & Systems**

Communicating through Design

**Transforming Philanthropy through
Donor Organizing**



\$10 FOR 10 FIGHTS

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ON OUR COVER

This image was part of the Causa Justa :: Just Cause (CJJC) 2013 sustainer campaign, called \$10 for 10 Fights. Donors who committed to giving \$10 or a month received this poster. Designed and illustrated by Design Action Collective, the image is an homage to a Vietnamese revolutionary poster and illustrates two CJJC members to signify black and brown unity. The sustainer campaign encourages long-term support through monthly donations, an integral way for supporters and allies to stop gentrification and displacement and to join the housing justice movement in the Bay Area. For more info, go to cjjc.org.

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Deepening Donor Relationships

By Jennifer Emiko Boyden

Although I've never had "fundraiser" in my job title since I've been at GIFT, I have had the pleasure of working with our donors, subscribers and advertisers since day one. And as I approach my 10-year anniversary here, I am reflecting on the relationships that have blossomed and grown with many of you during the last decade.

Some relationships have grown organically, as we collaborated on *Journal* articles, built resources for the Money for Our Movements conference, or came together to connect more social justice fundraisers with the collective expertise and knowledge of the broader GIFT community.

Other relationships began awkwardly or took more time to develop. I'll never forget reaching out to a long-time donor and advertiser for her mailing address when I first started at GIFT, and she politely let me know that I'd likely find it in our database. Whoops.

The articles in this issue of the *Journal* remind us that fundraising, like organizing, is fundamentally about building relationships, and that we should treat our donors as we would family or friends. We also offer concrete ideas for how you can reach out to supporters you may be struggling to connect with, and show how deeper levels of engagement translate into increased giving.

First, read Kim Klein's revised and expanded version of her classic article, "The Importance of Upgrading," for practical tips to keep our donors engaged and motivated to increase the size of their gifts. Nisha Anand follows with ideas for how we can be better stewards to our major donors through a thoughtful combination of love and systems. Next, Nadia Khastagir and Poonam Whabi of Design Action Collective share ways we can communicate with our base in between asks, and how utilizing design that supports our content maximizes our effectiveness. We close out this issue with a powerful story of transformation from Zeke Spier of Social Justice Fund Northwest, which has grown its donor base from 300 to 1,800 since 2010 through its innovative Giving Project model.

If you find these articles as helpful and inspiring as I do, please join us at the fifth biennial Money for Our Movements conference August 2-3 in Baltimore. Don't miss the opportunity to come together with social justice fundraisers from around the country to strengthen our skills, share our success stories, and build community with each other. Register today at grassrootsfundraising.org/conference!

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The Importance of Upgrading

By Kim Klein

ORGANIZATIONS THAT WANT TO GROW and thrive in this century need to be clear about three things:

1. **Givers give.** In the United States, 70 percent of the adult population makes regular donations to nonprofits. Many thousands more give money in much more informal ways such as helping homeless people asking for money on the street, buying raffle tickets and products from schoolchildren, and giving money to friends and relatives in need. More people give away money than vote, than volunteer, or than attend any house of worship. These people are going to give to your organization, or they will give to another one.
2. **Givers give when they are asked.** Our fantasy is that people who care about any given issue simply go on the internet to find great organizations who they decide to support with their donations—and there they find your organization! The fact is that people give when they are asked, and they don't when they are not.
3. **Givers give their favorite organizations the biggest gifts.** The real money in fundraising lies with donors who increase their giving. Encouraging a donor to go from \$250 to \$500 or \$1,000 to \$2,000 requires asking that person. It is rare that someone simply decides on their own to give more money every year.

Given these three premises, the primary question an organi-

zation needs to ask itself is: How can we encourage donors who clearly like our work and who are able to give larger donations to do so? This question leads to many related questions: How do we know someone can give more? How much more should we ask them for? How often can we ask for more?

Most organizations spend a lot of time trying to bring in new donors with events, social media, direct mail, and so on. They thank those new donors, and then they leave them alone and go looking for more new donors. Even if they do a good job asking people to give again and again, they rarely do a good job personally asking donors to increase their giving. So then, how can you focus on retaining and upgrading donors without losing sight of needing to acquire new donors?

Let's look at an example. A few years ago, a great organization asked me to evaluate their fundraising program. They had grown steadily for seven years, and their budget had increased from \$200,000 to \$550,000. Then they maintained that income for three years. However in the past three years, their income started to shrink and slipped to just under \$525,000. There was no clear explanation for this: they had not lost any major grants nor had any of their major donors left. The development director claimed to be raising money the way she always had: using board and volunteers to put together a good combination of major gifts, special events, membership, and about 20 to 25 percent from grants. The executive director said, "We need to figure out why we

are not growing, and now we are slipping. I think it is because of rising inequality—it is much harder for donors to give now than it used to be.”

While I agree that inequality is on par with climate change in how serious it is, I doubted that this was the root of their problem. I started by looking at their attrition rate, figuring that if they hadn't lost any major donors, perhaps they had lost a large number of smaller donors. Just a reminder: your attrition rate, or its sibling, your retention rate, is calculated by taking all the donors you had in the previous calendar year and comparing which of those donors gave in the most current complete calendar year. In other words, which of the people who gave in 2012 also gave in 2013? Expressing that number as a percentage of loss gives you your attrition rate; expressed as a percentage of renewal gives you your retention rate.

An acceptable attrition rate is about 35 percent. This means if you have 1,500 donors, you need to acquire 500 new donors every year just to stay the same size. Sure enough, this was part of the explanation for the organization I was studying. Their attrition rate had gone from 30 to 40 percent, and their rate of replacement was not keeping up. Since they had not been calculating their attrition rate, they hadn't noticed that their total number of donors was shrinking.

Three years ago this group had 3,000 donors, but was now at 2,700. However, this loss only accounted for about \$7,500. So, I had to then look at why they were experiencing a larger than usual attrition rate. Had something else happened? Was there an issue or problem no one was talking about that was undermining confidence in the organization? Talking to board, staff, and some key donors privately revealed nothing along these lines. In fact, the organization was still very well respected.

After more searching for clues in all the wrong places, I started looking at donor records. Here I found the main problem. Not only was their attrition rate higher than is healthy, they were also experiencing a phenomenon among major donors I have come to call “donor slide.”

About 250 people were giving \$250 or more for a total of \$300,000 in gifts ranging from \$250 to \$20,000. The handful of people at the top were holding steady, but more than half the donors in the \$250 to \$2,500 range were either giving every other year or, more important, had decreased their gift size. Of those who were giving regularly, about 100 had dropped their gifts from their all time highs. So people who had given \$2,500 went down to \$2,000, \$1,500 to \$1,200, and the like. Even the donors the organization was retaining were gradually shrinking their gifts.

Adding attrition and donor slide altogether accounted for the \$25,000 shrinkage in income in the past three years and portended

a steeper drop if something wasn't done soon. I asked the organization a series of questions that would be useful for any group with a donor program:

1. What kind of major gift campaign do you run each year with current major donors?

In this case, the development director said, “Someone from the board offers to meet the handful of really big donors we have. A lot of these donors are included in program activities, some are on the board, and others volunteer in other ways. The biggest donors have a great sense of involvement. As to the rest, board members are assigned names. We offer to visit anyone who has given more than \$250. Anyone giving \$50 to \$249 is called on the phone, and all phone calls are preceded by a personal letter or email.”

This level of attention helped explain why they still had a strong fundraising program. They were doing a very good job maintaining relationships with their donors. In many organizations, we see that the biggest donors get the kind of attention they would imagine they should get relative to their gifts. Donors at the other end of the spectrum don't expect a lot of personal attention and don't get much. So the biggest and the smallest donors are generally satisfied by how they are treated by the organization. If, however, someone gives \$500, and that is a lot of money to that person, they will often receive not much more attention than someone giving \$50. In many organizations, it is in the mid-range donors that we see a lot of attrition and shrinking gifts.

2. Do you call donors to ask why they have decreased their donation?

The immediate response was, “No, of course not, that is not our business, how awful...” But why not? Think of it from the donor's point of view. If you are not in touch with your donors at all, then calling to find out why they have lowered their gift would be rude. But if you call to thank your donors and are in touch with them from time to time otherwise, then asking them about their gift will not be rude. Do it this way: “Thank you so much for your gift of \$1,200. It means a lot that you continue to give. Last year you gave \$1,500, and I just want to make sure that this decrease doesn't have anything to do with us.” People will generally be happy to tell you why they had to give less this year. They will be happy you noticed.

3. How often do you ask your donors to increase their gift?

The development director replied, “We haven't done that in a long time because everyone is giving so generously. We felt that we didn't want to bug them.”

But from the donor's point of view, why agree to meet in order to be asked to do what you did before? Where is the excitement in that? From time to time (every two or three years at least),

A Story of Two Donors

MARIA HAS BEEN GIVING to a local wildlife rescue program for seven years. Her first gift was \$200, then \$200 twice in one year, then \$500, then \$400, then \$200, then \$100, and finally \$35. Maria says that when she makes a gift, she gets a lovely personal thank you note from the director or a board member. She reads the newsletter and she is invited to open houses and other events. No one has ever called her, offered to visit, or personally invited her to see the rescue program. She says she loves the organization's work. When asked why she had decreased her giving from her top gifts of \$500 and \$35, she said, "It has nothing to do with the group, but \$500 is a lot of money for me. For them, it is probably not that much. I could tell that my giving wasn't that important because whatever I sent, I got a lovely note. I will always support them, but I prefer to make my biggest gift to an organization that really needs that kind of money and doesn't have many other donors."

Ironically, Maria's gift of \$500 put her in the top 20 donors for this group, a fact that she had no way of knowing. Unfortunately, the organization feels it is intrusive to ask to meet someone who has given a big gift and rude to ask someone why their gift has decreased. Without communication between them, the group's assumptions and Maria's interpretation that nothing she gives matters that much will leave both of them in the dark.

CLAUDIA BECAME A MEMBER of a community organization with dues of \$35. The following year, she saw that for a \$50 membership donation, she would get a free T-shirt. So, she sent \$50. Later a board member approached her for \$100 for a special project, and she gave that amount. Each year she was a member, she got three appeals and four newsletters. She was often invited to local events. She occasionally responded to the extra appeals. One time, after she received a raise, she gave \$500. After that, she stopped receiving the extra appeals. She got another T-shirt and an annual report, but no more invitations to actions or events. As she described it, "The more I gave, the less attention I got. So, I decided to go back to just giving my dues. I liked the extra appeals — they told me what was happening, and, if I had extra money, I could share that. I liked being called to go to things, but once they thought I was a 'major donor,' they stopped treating me like a regular person."

Even though Maria and Claudia had very different experiences of being major donors, neither organizational strategy was productive. Donors need to be treated like friends, not put on a pedestal or a shelf.

you need to ask for enough money that the donors will have some questions before they can make their decision. These questions will most appropriately be answered in a meeting, but few people will agree to a meeting unless there is something more at stake than just thanking them for what they do already.

Anyone who has ever been to a fundraising workshop has heard the adage, "Fundraising is about building relationships, not about raising money." This means that you treat your donors the way you would treat a friend or a neighbor. If a neighbor who is normally out and about suddenly isn't around for a few days, you call to see if he or she is okay. If a donor who gives several years in a row doesn't give this year, you call to see what is happening. Our desire not to "bug" or "pester" people comes from some deep insecurity about our work. Can you imagine saying to a friend, "I promise to only ask you to do something with me once a year," or "I haven't heard from you but figured that was none of my business, so I didn't call"?

The simple fact is that organizations that don't ask their donors for more money from time to time give the impression that not much is happening. We are all eager to avoid looking greedy, but our efforts "not to be like those groups" give us little room to figure out who we want to be. What programs do we need to have? How much will it cost this year to make the changes we want to make? Donors will be excited about new programs and new directions. They will be concerned and want to help if you lose government funding or have a huge influx of people who need your services. They care about the organization, and you need to show that you care about them by being in touch and asking them to help.

Social change isn't cheap, and the price is going up. Your donors know that—and they want to know that you know it too. ■

Kim Klein is co-founder of the *Grassroots Fundraising Journal*.

Want to learn more about keeping donors engaged and motivated to increase their gifts? Check out these and other articles in the *Journal* archive @ grassrootsfundraising.org/archive! Free if you're a subscriber, otherwise \$3 each:

Welcoming Your Friends' Friends by Nzinga Koné-Miller

Common Mistakes in Building Relationships with Donors (and How to Avoid Them) by Stephanie Roth

Keeping Donors in the Know by Kristin Cashmore

Committed for the Long Haul: Tips on Successfully Stewarding Your Mid-Level Donors by Will Cordery



Love & Systems

Building Lasting Relationships with Your Donors

By Nisha Anand

IMAGINE YOU HAVE TAKEN A GREAT DEAL OF TIME to plan the perfect garden. You took into consideration climate, shading, usability, and so much more. You took great care to plant the seeds just so. Since you are a good researcher, you know your vegetables will begin to grow in six months.

Six months later when you visit your garden, there are no vegetables.

Too often I have seen organizations take such careful steps to get great donors on their prospect lists and forget all the care that is needed to make things grow. The water and sunlight in relationship building with your donors is called stewardship. And just like with gardening, without stewardship, there will be nothing to make dinner with when you need it most.

LOVE & SYSTEMS

I have come to think of relationship building in all aspects of fundraising as a balance between love and systems. The well-planned and researched garden is absolutely necessary. A system in place for watering and maintenance is critical. However without the somewhat intangible ingredients of love and care, results are mixed. Remember how we are told to talk to our plants? Now that is an exercise in love!

SYSTEMS

No matter the size of your organization and your operating budget, a few systems must be in place if you are serious about donor stewardship. These are absolute non-negotiables:

- **A great data tracking system**

Many great databases exist out there to track information. Use one! The more information you can put into your database (in

a logical and organized way), the better. Remember you will not always be the person in the fundraising role. Set yourself and those who come after you up for success.

It goes without saying that donations should be tracked meticulously. But also track in-person, email, and phone conversations. Use a bullet-point summary or “top-line notes” with links to full conversations, or include all the information if your database is capable. Some databases are set up to send out “ticklers” and other reminders for stewardship. Make technology your friend here—the larger you grow, the more important these types of technological shortcuts will become.

A good database is only as good as the person entering the data. Make sure there is a system in place as to who, how and when all data will be entered. Every person who uses the database needs the same training to ensure uniformity of data and, ultimately, usability for fundraising success.

- **Quarterly touches**

At a bare minimum, all donors need a “personal touch” every quarter. This is not a generic newsletter, email forward, or blog. This is a personal call, voicemail, or email from the person responsible for stewardship. In these days of information overload, the personal touch is more important than ever. During times of important campaigns, weekly contact may be advisable.

As you can see in Figure 1 on the next page, quarterly touches are rarely one size fits all. In Q1, this staff member sent all the donors different videos/stories matched to their personal interests. In Q2, the touches were all the same, but the personal call allows room for relationship building and

Major Donor Tracking – Quarterly Contact Cheat Sheet					
(very basic sheet)					
Name	Q1	Q2	Q3	Q4	Next steps (running list)
Terri	Sent silly viral video of “green cats”	Development director called to invite to party	Executive director sent personal email update	-	Plan Q4 ask
Tenzin	Sent video about important congressional issue	Development director called to invite to party	-	-	Draft email update – ask for in-person meeting
Nikki	Sent news article about their senator	Development director called to invite to party	-	-	Ask to volunteer
Amar	Sent video of a campaign rally	Development director called to invite to party	Invited them to local group’s movie night	-	Plan Q4 ask

FIGURE 1

growth. The running list column can be edited regularly to help you plan next steps.

■ **Weekly maintenance**

Set up a system for checking in with your work and/or your team weekly. This could be as simple as reserving an hour of your work week for “major donor upkeep.” There are three basic check-ins necessary every week:

1. **Is anyone on my list due for a touch this week or shortly thereafter?** This could simply be a calendar or spreadsheet you check or a data system you have set up.
2. **Were there any interesting things that happened that week (with our work or with the world) that would interest some of my donors?** This kind of thoughtfulness and outreach takes very little time but goes a long way in donor stewardship.
3. **Is there absolutely anything to add to the database that can help us with future relationship building?** Any email correspondence or connections need to be entered right away. There is nothing worse than a stack of 100 emails in your “need to be entered” file. Make time to clear the weeds!

Love: Trust Your Instincts

Getting to know your donors and building lasting relationships is more of an art form than a science. Stewardship feels similar to any type of relationship building. Some ideas to practicing this type of love are obvious when we stop thinking of donors as dollars and instead think of them as family.

Learn about your donors:

- Get to know your donors like you would anyone entering your life. Find out their interests, and support them in their

other endeavors. Your donors care about your mission. Just that alone means you share something in common. From there, many things can grow.

- Remember to send them fun items too—successes from partner organizations, interesting news stories, or silly memes are all fair game in this day and age.
- Remember the small things like birthdays, children, or any big event happening for them. Personal cards and well wishes are not just important for cultivation; they are the right thing to do as a fellow human.

Include donors in your work:

- Seek their counsel when needed. We all like to be recognized for the gifts we bring to the table. Anyone that loves your work enough to contribute significantly must also have other gifts they would like to contribute.
- Always make sure to include your donor base when you have something to celebrate. Your organization’s success is also their success. They have invested their resources to see your work thrive. Invite them to the celebratory dinner!
- Also include them in your struggles. Self-reflection and growth are acts of love. We don’t always get things right, and sometimes we will fail. Admit where you went wrong and where you could have done better. Your donors will appreciate the thoughtfulness and honesty.

Technology: Great for Systems, Terrible for Love

In my 15 years as a development professional, I have watched technology in our field grow and explode. We now have data at our fingertips that allow us to target any demographic from our list with a personalized email at the drop of a hat. Links on our website can automatically update addresses and donor information. Our volunteers can now fundraise with

Tech Based Solutions Worth Trying Now

• “Pings,” “Ticklers,” and “Reminders”

There are many calendars that send you reminders for events coming up. Some of these tools set up reminders in your calendar or send you text messages. Now, good databases can also analyze your data and give you a reminder too. For example, your database may be able to scan for people in your “major donor” or “VIP” category and ping you if you haven’t communicated with them in three months.

• Constant Contact, Mail Chimp, and other email solutions

Old school development directors remember bringing our lists to mail houses in order to supervise a letter merge. Now, we can digitize personal correspondence in seconds. Victories and touching stories are so easy to share. Take advantage of it. Also make sure to analyze your click through and open rates so you can keep sending out your best stuff.

• Volunteer Fundraising pages

It has never been easier for your board members, VIPs, and community to fundraise on your behalf. Databases that provide this functionality also capture new prospects at great rates. Having a follow up plan to process and make sense of all the new email addresses is a must if you fully want to take advantage of this feature.

• Petitions and “Crowd Sourcing”

Many organizations struggle with new member acquisition—the ability to bring in a stream of new prospects in order to replace lapsed donors and grow the donor base. With online petitions and a variety of crowd sourcing options (i.e., Help us come up with a slogan! Give us your best idea! etc.), new names can come in fast for the digitally savvy.

• Document Sharing

The major leaps in online document sharing can really help build the fundraising culture of the entire team. Many donors are involved in other parts of the organization. Having an easy way for program staff to see what is going on with donors (and vice versa) can amplify your organization’s power to “love.” If not everyone can access your database, a basic Google Drive set up can let your team check in on progress and alert you to important developments.

FIGURE 2

Kickstarter-like campaigns that directly feed into our data systems. Facebook likes can be translated and analyzed to maximize donor outreach. It is a good time to be a tech-savvy development director.

However, just as with your garden, you must use the right tool at the right time. Just because you have access to an industrial grade tiller does not mean you want to use it to pick out weeds from in between your greens.

Use technology appropriately. A few mail merge mix-ups and offended donors (“What, I just gave you \$5,000! Why would you ask a week later?!”) will definitely help you course correct. However, if you start thinking of your tech as your “systems helper” and not as your “tool for love,” you may save yourself from some embarrassing communications. See Figure 2 above for tech-based solutions I’ve found helpful.

A Note on the Ask

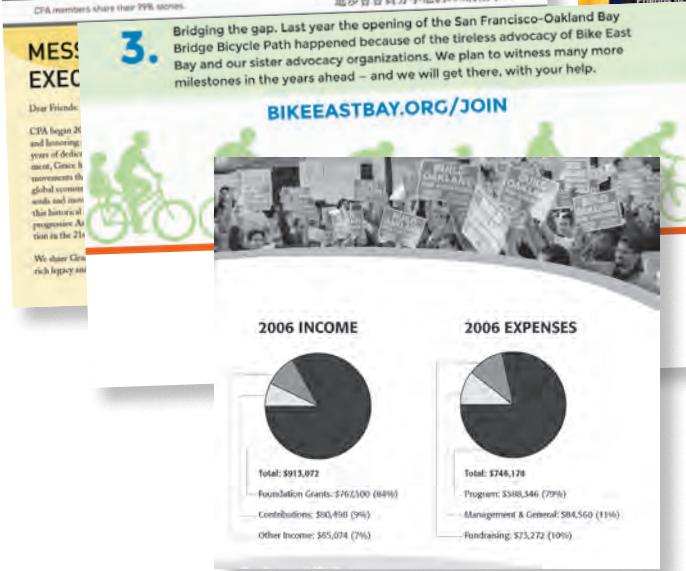
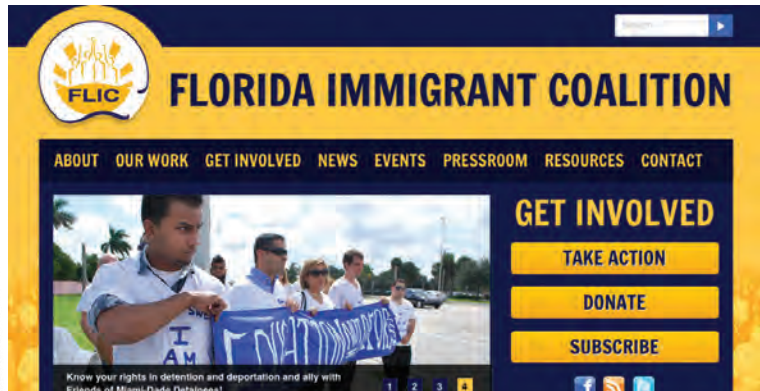
Many great things have been written about conducting major donor campaigns and helping askers get over fears. To add an obvious point to these existing conversations, if you have been in charge of stewardship, you should be the one to ask, follow-up, track, and thank.

In addition, I see many people get lost in the particulars around asking for money. We spend so much time planning major donor campaigns and develop all sorts of materials to prepare our team to make an ask. Sometimes this amount of preparation can amount to procrastination and busy work. It is often unnecessary to assemble a team of solicitors with major donor lists under 50. Just like your backyard garden, bringing in a dozen helpers would just trample up all the hard work you have been putting in. Sometimes the right tool for the ask is simply, well, simple: just ask.

Moving Forward with Love & Systems

Do not just leave your garden to chance. So much can happen in the course of the year that will leave your basket barren when it is time to fundraise. I believe in “love and systems.” I have watched great things grow when organizations are intentional and thorough with their stewardship. Plant your garden, and maintain its excellence. When it is time for the harvest, we can all feast and enjoy the reason we are all at the table: your mission and vision growing in the world. ■

Nisha Anand is the director of external relations at Rebuild The Dream and a senior trainer and consultant for GIFT.



Communicating through Design

By Nadia Khastagir & Poonam Whabi, Design Action Collective

STAYING IN TOUCH WITH YOUR DONORS throughout the year—and not just when it’s time for an appeal—is an important way to keep your donors engaged by letting them know what is going on with your organization. Your donors and members should know about the important work you are doing year round. There are many options and strategies that can be utilized for them to easily engage and get involved with your organization.

At Design Action we have been designing printed materials and websites for the Left for over 12 years and have seen a lot of strategies for fundraising. We also know there are a lot of “accidental” in-house designers out there. Since our mission is to advance the messages of the social justice movement through well-crafted visual communications, we also share skills and resources with those doing design work for the movements themselves.

Print is Not dead!

Many organizations have had to take drastic cuts in their spending, and print publications are often the first thing to go. Although publications can be easily distributed online through email and the web, many community-based organizations still need to print their newsletters, flyers, and updates to hand out in person to members (and potential members) who do not have internet access.

Newsletters

Printed newsletters are a great way to keep in touch. They should be sent out on a regular schedule, whether monthly, quarterly, or yearly. A well-designed newsletter will stand out in the mail and will draw in your audience to read your updates and find ways to engage.



Member profiles value the contributions of your members and build anticipation for your publications.

Divide the newsletter into bite-size sections that appear in each issue so the reader can anticipate what is coming. One important section to include is a member or donor profile. This will engage your base, create excitement for the work you all are doing, and build anticipation for who will be profiled in the next issue.

Other useful and interesting items to include in newsletters are calendars of events, timelines, a letter from the executive director, analysis about the issues confronting your organization, and some fun facts or tidbits.

Create a design that represents your organization's mission and tone. A short newsletter will allow the reader to digest it in one sitting. A longer newsletter will give space for more in-depth analysis about the issues you are working on. Design elements such as pull quotes, text boxes, and lots of photos will make your newsletter visually dynamic and more readable. It is possible to speak to a wide audience (donors, members and funders) through a newsletter design while capturing the spirit of your organization.

Many organizations prioritize making their newsletters bilingual, which can be logistically challenging. It is possible to lay out bilingual newsletters in a way in which one language does not take precedence over the other. Vary the layouts and the photographs so speakers of both languages can enjoy the entire newsletter, not just half of it. Chinese Progressive Association, POWER and

PODER— all San Francisco member-based organizations—use effective bilingual newsletters that are inclusive of all the members of their multilingual bases.

If you rely on volunteer designers with varying skill levels, it is still possible to create a simple design template that is visually powerful. InDesign is the professional layout program that we use, although it requires some graphic design understanding and skill. Unfortunately, it is marketed for larger pocketbooks than our grassroots budgets. There are other layout programs available, such as Publisher, which are consumer-oriented in price and skill-level. However, be aware that there are many nuances to printing, so taking a course or tutorial will be a good place to start in understanding how to prepare files for the printer.

Annual Reports

Annual reports are an important way to report your financial statements to your donors while showcasing all the great work you have done in the past year. We have seen the gamut of different annual report styles from 16-page conceptual reports, to short, 4-page summaries.

Whatever the length, it is important to put a lot of thought into how to amplify the effectiveness of your annual report. You can design the report in an infinite amount of creative ways. The main elements always should include:

- a letter from the executive director(s);
- narrative, whether visual or written, about the programmatic work and successes of the year;
- a showcase of highlights, media attention, and publications;
- financial statements of income and expenses;
- a funder and donor list; and
- a staff and board list.

Visually, conceptual reports are beautiful, but also tend to distract from the content. These types of designs place a lot of emphasis on a metaphor or abstract design that carries through the report. Good design should support the content. Throughout the various sections of your report, compelling photos of your base are a beautiful way to drive the narrative and create excitement for your work.

E-newsletters

E-newsletters are a cost-effective way to stay in touch with your base and keep your organization on their radar.

Many user-friendly and powerful mass email service providers are available to you, such as Constant Contact, Mailchimp and Vertical Response. The cost of the service will vary depending on the size of your list. For example if you have less than 2,000 subscribers, Mailchimp will allow you to send up to 12,000 emails

a month for free. After some initial set-up, such services can help you save time by easily automating subscriptions via an email sign up form embedded on your website. They also allow you to track open rates, see which links within your content are clicked the most, and know how many people unsubscribe from your list. This data allows you to be more effective in your email communications, which is important since your organization likely has limited time capacity that needs to be used wisely. Successful open-rates vary between 20 and 30 percent depending on who your base is, when you send it out, the industry you are part of, and the number of subscribers.

Not only is it more work to manage your list without an email service, sending emails straight from your email account make it more likely that your messages will end up in your supporters' spam folders. Legally, you must include the option to unsubscribe in your email, which is automatically included in an email service.

What is the goal of your newsletter? That is the question that should drive the planning of your email. Is your email an action alert? Or is it a more traditional newsletter with multiple pieces of content? Is it a fundraising appeal?

In most cases, the goal is to direct people to your website to read further content or take action, to raise awareness on a campaign, or to get donations for the organization. Tailor the content to meet the specific goal of each e-announcement. You can target different audiences depending on the nature of each e-newsletter. In the sign up form for your email list, you can ask specific questions in order to segregate the list by region, interest, or ways that the member engages. You may also brand each type of email differently through unique banners or different color schemes. Visually the reader should know they are all from the same organization, but the look of each one can be different based on the type of announcement it is.

When writing an action alert, make sure you give readers all the information they need in order to take action. Because our inboxes are overloaded, keep content as short as possible with just enough information to engage the audience, so they click on the button to take the action you are asking. Don't distract them with other content in the sidebar of the newsletter. Keep it simple and direct.

Overall, keep the design of your e-announcements visually consistent and aligned with your website and visual brand if possible. Most email services come with free preexisting templates that are a good start, but it is worthwhile to invest in a customized template which matches your organization's visual brand.

To maximize the reach of your e-announcements, make sure to have an email list sign up section on your website in a visible location.



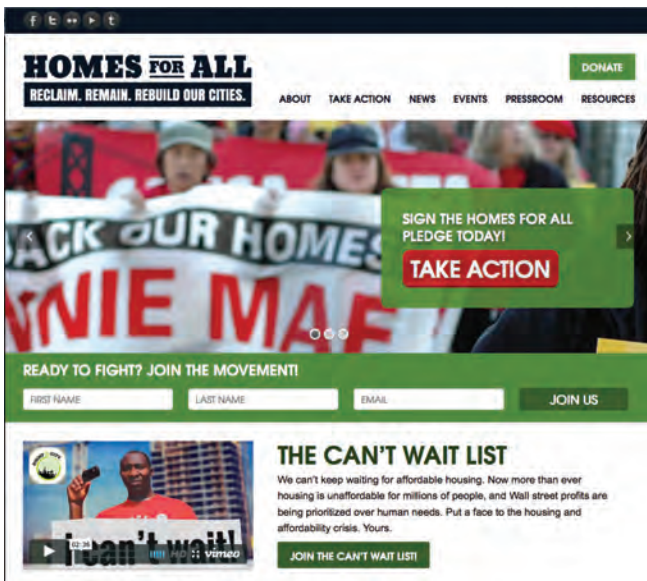
Causa Justa :: Just Cause has one email template specifically for a single action alert.

Websites

When thinking of your website architecture, the first step is to define and prioritize your goals for having the website and how they relate to the overall goals of your organization. Assuming raising funds is one of your goals, think about what donors need to see in order to inspire them to give money. For example, your website might include:

- annual reports on how you use your money;
- success stories from the community or personal stories from your constituency talking about how your work has impacted them; and
- facts and figures to support your success stories.

When designing the website, make sure your donation asks are high up in the banner or content area and are very visible. You can also include sidebar widgets that say things like, “Your donations help to do _____. Donate now.” You can also set up your widget so the blurb changes every time the website loads.



Homes for All has a loud and clear place for people to Take Action and sign up for joining the movement.

Many creative online fundraising tools inspire people to donate, such as videos or animations that tell stories about how the donations are used. People like to see where their money is going.

It is important for donors to see that you are an active organization that regularly connects with its constituency. It helps to post regular updates and use social media in a manageable capacity.

Conclusion

These are just some of the standard ways that you can keep in touch with your base throughout the year. The key throughout is for donors to see that you are an active organization that regularly connects with its constituency. It helps to post regular updates and use social media to its fullest. There is no shortage of simple and creative outreach opportunities you can leverage on a more frequent basis through sharing images on Facebook or Instagram, YouTube videos, Twitter comments, and much more. Having a multi-faceted communications strategy will allow for maximum reach to your members and donors through both printed and web media. ■

Design Action Collective is a creative communications studio serving the movement for social justice with graphic design and web services, based in Oakland, CA. www.designaction.org

Causa Justa :: Just Cause's \$10 for 10 Fights campaign

By Lorraine DeGuzman

We asked supporters and allies to choose a campaign fight that Causa Justa :: Just Cause (CJJC) is up against, and to make a commitment to help win these fights by donating \$10 or more a month. Our fights in 2013 included:

- Fight for a voice in elections
- Fight to end secure communities
- Fight for the leadership development of communities of color
- Fight for "hassle-free" housing
- Fight evictions
- Fight for habitable homes
- Fight landlord neglect
- Fight for a voice to end displacement
- Fight for homes for all
- Fight against single room occupancy evictions

We sent supporters who were already sustainers a CJJC shirt and asked for "selfie" photos in their shirt holding up a sign showing a CJJC fight that they are supporting with their donation. We posted these photos on our Flickr, Facebook, and Twitter accounts. We also featured these supporters on our website.

We reached our goal of 100 sustainers at \$10 month or more to help CJJC win these fights:

- CJJC pressured San Francisco Supervisors to pass the Hassle Free Housing Ordinance in San Francisco.
- CJJC, with other housing rights organizations, won progressive legislation that places a moratorium on further market-rate condominium conversions for 10 years. We are one step closer to stopping rampant evictions.
- CJJC members pressured the San Francisco Board of Supervisors to unanimously pass a resolution severely limiting local law enforcement to collaborate with U.S. Immigration and Customs Enforcement (ICE) to detain and deport immigrants in San Francisco. We are one step closer to ending the Secure Communities program.
- CJJC was part of a statewide coalition that passed the TRUST Act in California which allows counties to opt out of Secure Communities.
- CJJC won a 10% cap on rental increases in Oakland. We are one step closer to ending displacement.



Project Manager Karen Toering guides last year's Environmental Justice Giving Project participants through a democratic grant decision-making process.

Transforming Philanthropy through Donor Organizing

By Zeke Spier

IN 2010, SOON AFTER OUR 30TH ANNIVERSARY, Social Justice Fund NW was faced with a difficult (and common) problem: our donor base was aging and shrinking, and our relationships were feeling increasingly tenuous. Many of our 300 donors, especially those giving the most, had been contributing for 10 years or more. Additionally, only a few dozen were younger than 40 years old. We had been running significant deficits for two years, and our reserves were depleted.

Social Justice Fund is a member-funded foundation that makes grants to small-scale community organizing groups working for justice and equality in Washington, Oregon, Idaho, Montana, and Wyoming. Our ability to fund our grantees is almost completely

dependent on our fundraising. Just as many larger progressive funders were cutting their grants, we too had less to give.

As our board and staff met to figure out Social Justice Fund's future, everything was on the table including merging with another organization and closing our doors. We tasked small groups to explore the implications of these options. One of the groups had the broad and ambiguous goal of finding "new models" that would bring sustainability. As 2010 rolled on, we realized that we had already started a new program that could become the new model we needed.

Four years later, we have more than 1,800 donors, the majority of whom are under 40 years old. We have doubled our income

“I HAVEN’T FELT THIS EXCITED ABOUT SOCIAL JUSTICE WORK IN A LONG TIME. WHO KNEW THAT IT WOULD BE FUNDRAISING THAT WOULD MAKE ME EXCITED!”

~JENN BOWMAN, NEXT GENERATION GIVING PROJECT 2011

and are investing in future growth. In the rest of this article, I will share the details of our model and the lessons learned for others who want to maintain and grow their donor base.

Next Generation Giving Project

Starting in the late 1990s, Social Justice Fund made a concerted effort to engage a cross-class and cross-race base of donors. This was crucial to our mission because our grant decisions have always been made by groups of donors through a democratic, consensus-based process. Doing this well requires a lot of intention. We started leading racial justice trainings and cross-class dialogues to create trust and shared analysis in our decision-making committees. We also refined our grantmaking training and decision-making process to work better for diverse groups.

This process worked well to make good funding decisions, but the committee structure only allowed a subset our membership to participate. Additionally, we did not have a good mechanism to channel the energy and dedication of community members into community building or fundraising success. Most important to the formation of this project, we hadn’t successfully engaged a key group: progressive young people with financial wealth.

Working with leaders of the local chapter of Resource Generation (which organizes young people with financial wealth to leverage resources and privilege for social change), we developed a project that built on our experience and was consistent with our values. We worked with people from many backgrounds to make sure the project was appealing to Resource Generation constituents, while still working as a cross-class and cross-race space. We ended up recruiting 18 participants, all less than 40 years old, to participate in a six-month process we called the Next Generation Giving Project. Six of them were Resource Generation constituents, while the other 12 were recruited through our existing membership, our grantees, personal relationships, and word of mouth. Our goals were to:

- move money towards social change;
- build cross-class community;
- engage younger (under 40) folks in philanthropy;
- build skills as donor organizers; and
- educate ourselves about needs and potential of the social change sector in the region.

The group was one of the most diverse in terms of race, class, nationality, gender, gender identity, and sexuality that many of us had ever worked with. Social Justice Fund staff facilitated seven

meetings that included community building, a cross-class workshop, a panel of movement leaders, training on grantmaking and fundraising, and our grant review process. In addition to participants themselves making meaningful donations, we asked each of them to make one-on-one asks to their friends and family.

We set what we thought was an ambitious goal of \$50,000. As the process unfolded, it became clear that we were being too modest. Participants were having personally transformative experiences around their relationships to money. They were giving more generously than they ever had before. We talked about fundraising as donor organizing, and they fully embraced the transformative potential of this frame.

The group ended up giving and raising \$135,000. In addition to this success, there was a level of energy and excitement among participants that we had not seen in a long time. Most important, we realized we could replicate this process.

The Giving Project Model

We decided to fully embrace the Giving Project model. We developed a plan to stop all our other programming and focus on launching four Giving Projects for 2011. We started sharing the new model with our supporters, and the response was even more enthusiastic than we expected. Many of our long-term supporters increased their giving, and a number of lapsed donors returned. We exceeded our budget by \$100,000 and were able to hire staff to build all four projects.

By the end of the year, we had revitalized the organization. We had more than doubled our membership to 800, we had dozens of mostly young leaders eager to take on leadership roles, and our existing supporters were more dedicated than ever.

We continued to expand through 2012 and 2013, refining our process and learning many lessons. We have led as many as nine projects a year. Giving Projects are organized around identity (like the Next Generation Giving Project and LGBTQ Giving Projects), specific issues (like the Criminal Justice Giving Project and Environmental Justice Giving Projects), or geography (like the Montana Giving Project).

We transformed our traditional fundraising model to one where half our income and almost all of our new donors come through volunteer donor organizing. We stayed true to our mission, prioritizing the participation of those usually left out of philanthropy. In 2013, nearly 50 percent of the 150 participants in our Giving Projects were people of color. We now have a donor base of

1,800 (and growing), and we have granted more than \$1.4 million through Giving Projects.

Although we are still making changes and improvements, the basic Giving Project process is solidifying. What follows is a more detailed description of the process:

Introduction and storytelling. During this full-day meeting, we start by establishing group agreements and reminding ourselves of the goals of the project. We spend some time grounding ourselves in the history of social justice movements. The biggest section is based on personal storytelling—we help each participant refine a one-minute story about why they care about social justice (and why they joined the project) that they share with the full group. These stories help create a sense of community for the cohort and become the first part of participants' fundraising pitches.

Race and class workshop. We spend a full weekend digging into analysis of race and class. We bring together groups across these identities and ask them to talk about money and racial justice. Digging deep in these areas is vital to the success of the project. We developed this workshop ourselves, borrowing from organizations like People's Institute for Survival and Beyond, Western

us. We take time for participants to create their own prospect lists and plans for action.

Grantee Summit. As our projects proliferated, we grew what started as grantee panel discussions into a cross-project summit. We bring together movement leaders who work on issues like immigrant rights, gender justice, environmental justice, and economic justice so our participants can hear directly from the front lines of social justice work. In addition to getting inspired by all the amazing activism happening in our region, we learn about how difficult it is for small, grassroots groups to get sustainable funding. Often, this summit motivates participants to start or accelerate their fundraising, while building community among the multiple stakeholders of our organization

Grantmaking training. During this evening meeting, we ground our conversation in the analysis we built around race and class. We talk about the principles of social justice philanthropy, including a commitment to addressing root causes, building grassroots leadership, and a process that is transparent and inclusive. We talk about the grantmaking steps and criteria as well as effective group decision-making processes.

I REALLY TOOK [FROM THIS PROCESS] THE CONCEPT OF A DONOR COMMUNITY. MONEY FOR NONPROFITS IS “OUT THERE”; NOW I KNOW THAT THE CONNECTION CAN BE THROUGH ME.

~LYNN SEREDA, ECONOMIC JUSTICE GIVING PROJECT 2012

States Center, and Class Action. We build a shared framework around individual, institutional, and systemic racism and learn to apply it in our work together. During the class conversation, we explore our own class backgrounds, what we learned about money growing up, and how that affects our relationship to giving and fundraising. We ground the conversation in collective liberation and how all of us—those of us with more privilege and those who have been more marginalized—can take action for justice.

Fundraising training. In this powerful evening training, participants each announce their personal meaningful gift to the group. Although contributions have ranged from \$50 to \$20,000, we celebrate each gift equally. Our staff meets with each participant individually to help them decide what gift amount is right for them (as well as check in on how the project is going), and the group trusts the process. As we get into the training, we emphasize the donor organizing concept—the way we raise money is more important than the amount. Our goal is to engage people in meaningful conversations about justice, tell our stories, and challenge others to make meaningful contributions along with

Grant screening. This full-day meeting kicks off the formal grantmaking process. Each participant reads 12 to 35 applications and scores them. These scores become a starting point for conversation. Our goal is to narrow down the field to select groups to do site visits. In the process of discussion, participants also draw upon the collective knowledge of the group and learn from each other. This meeting is the first time that the need for funding becomes concrete and further accelerates participants' continued fundraising efforts. Staff members continue to provide extensive one-on-one fundraising support outside of formal meetings.

Site visits. Over the course of a few weeks, participants travel throughout our region to meet with potential grantees in person. Hearing about the work from organizations in their own words and own space is not only crucial for our grantmaking process, it deepens the commitment of participants. We train our participants to mitigate the power dynamics that often show up in site visits. These site visits can be a way to build relationships throughout our organization's community, which includes our grantees as well as our members.

Final decision. Participants report back from site visits and make often impassioned cases for groups to be funded. The final fundraising tally comes in, and we spend the day allocating our resources. (15 percent of the money raised goes back to Social Justice Fund to offset the costs of operating the Giving Project; 85

percent goes directly into the grants). We celebrate, struggle, and sometimes shed tears as we make tough decisions. If participants weren't already convinced that grassroots social justice organizations are underfunded, they are now. They leave with renewed commitment as well as the empowering feeling of having raised and given away tens of thousands of dollars.

MANY PEOPLE WHO WERE FEELING LESS CONNECTED REENGAGED BECAUSE OF ALL THE NEW ENERGY.

Celebration and evaluation. The group has now spent about six months together and gone through politically and personally intense work. We take the time to celebrate our accomplishments while capturing wisdom about how we could improve our process. Because we don't just fund organizing—we are organizing ourselves. We talk about how these new alumni can stay involved and develop their leadership with Social Justice Fund.

Lessons Learned
Each project results in new lessons for our model. Many of these lessons are applicable to other organizations seeking to sustain and build their donor bases.

Engage people fully.

The combination of building community across identity, developing shared analysis and strategy through political education, and implementing clear action steps with support adds up to deep volunteer engagement. Our Giving Projects would not work without all of these components.

Don't underestimate your base. It is possible to raise significant funds even without wealthy people. In one of our projects, no one could make a personal gift above \$1,000, but we were still able to raise more than \$30,000. Donors that had been giving \$50 to \$100 were able to give and raise thousands through this process.

Ask more, get more. Under our old model, we struggled to get our donors to join our grantmaking committees. Participating in a Giving Project is at least four times the work, but recruitment is easier. People are looking for meaningful ways to engage that challenge them.

New momentum is contagious. We were initially worried that this shift in our work would alienate our long-time supporters. The opposite happened—many people who were feeling less connected reengaged because of all the new energy. We were overdue

for an organizational reinvention that could kindle new interest and excitement.

The details matter. As we improved our fundraising support, the average number of gifts that each participant successfully asked for increased from three to seven. Shifts in our recruitment conversations significantly increased our retention. Continuous experimentation and evaluation have been crucial to our progress. It has taken three years to feel like we're starting to know what we're doing.

Moving Forward

In addition to the great financial outcomes, we are starting to see the impact of the leadership development we have done through the Giving Projects. More than half of our board members are now Giving Project alumni. Other alumni have stepped up their fundraising and leadership in other organizations and projects that they care about.

We still have a lot to learn about this model. Most of our new efforts are focused on how we can get the donors that came to us through participants' fundraising to renew their gifts. This is a staff-intensive model, so building a long-term donor base is important to our sustainability.

Despite these questions, we believe that our Giving Projects are a uniquely effective way of using donor organizing to build the funding base for progressive movements. We believe that many organizations—and our movements—could benefit from launching similar donor organizing projects.

One of our grantmaking criteria is that the organizations we fund bring people together to build collective power in order to create systemic change. We hold ourselves to the same standard. This is exactly what our Giving Project members are doing. Our movements will be stronger and more sustainable when more people are activated as donor organizers who use their passion and their stories to build the collective power and resources we need to fuel this work. ■

Zeke Spier is the executive director of Social Justice Fund NW where he has been engaging donors for seven years, moving millions of dollars to grassroots organizing in the Northwest. He sits of the boards of Emerging Practitioners in Philanthropy and Resource Generation.

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—BARACK OBAMA

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