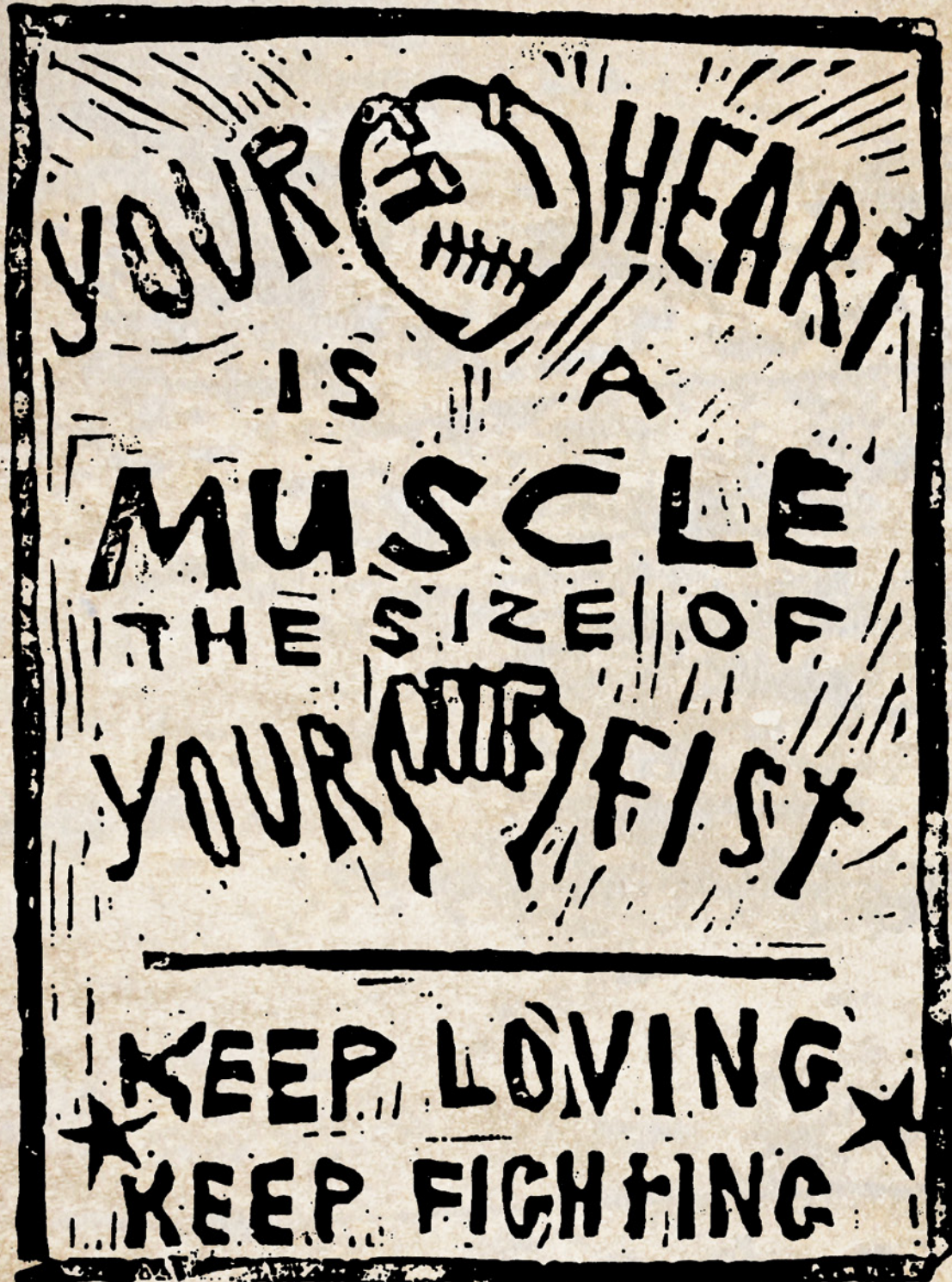


# Grassroots Fundraising Journal

VOLUME 34 NUMBER 4 • JULY–AUGUST 2015

A PUBLICATION OF

**GIFT**  
Grassroots Institute  
for Fundraising Training



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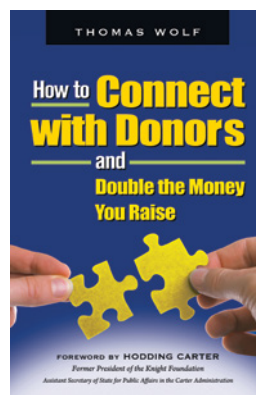
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#### On Our Cover

The art on our cover was designed by Dalia Shevin, one of the activists involved in the 2000 RNC protests. R2K Legal used the same image, along with the "Liberation" image above, on thank you cards to supporters. You can read more about this successful fundraising campaign on page 12, "Fundraising for Direct Action & Legal Defense: A Case Study of the 2000 RNC Protests."

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## Waging Love

By Crystal Middlestadt

**IT'S A PLEASURE TO WRITE TO YOU** as the newest member of GIFT's staff. To start this issue off, I wanted to share news from the 2015 Allied Media Conference (AMC), produced annually by Allied Media Projects in Detroit. Each year, the AMC is a deep reminder of why I do this work. The incredible struggle and brilliance that comes from inviting 2,000+ social justice organizers, media makers, technologists, fundraisers, and educators to imagine and co-create a more just and equitable world is humbling. The AMC reminds me that when we center the leadership of those on the margins and bring our whole selves to our work, movements, and communities, **beautiful and complex new possibilities begin to emerge.** This year was no exception. As the massacre in Charleston weighed heavy on our hearts, the grief, pain and anger were palpable. In the face of the ongoing attacks on Black lives and communities, we were invited to Wage Love and to remember that imagination and speculation about our futures is a political act. In the words of Grace Lee Boggs, "A revolution that is based on the people exercising their creativity in the midst of great devastation is one of the great historical contributions of humankind."

Ryan Li Dahlstrom of GIFT was thrilled to collaborate with Tanya Mote (Su Teatro), Lisa Weiner-Mahfuz (The Religious Coalition for Reproductive Choice), and Allison Budschalow (Media Mobilizing Project) to coordinate the second **"Resourcing and Sustaining Our Movements"** track at the AMC. Participants were invited to explore creative responses to common fundraising, resource organizing and sustainability challenges that many of us face daily, within and outside of nonprofit structures. This year's track was comprised of 10+ workshops including *Fundraising Your Story*, *Kickstarting and Sustaining Trans and Queer People of Color Artists*, *People-Powered Movements*, *How to Start a Major Donor Program*, *Crowdfunding to Build Community (Not Tap it Out)*, and *Building Our Movements Without Losing Ourselves*. We know that sustaining our movements is about more than raising money. We must also build cultures and communities of care so that we may thrive, individually and collectively.

One of the ways GIFT builds cultures and communities of care is by publishing the *Grassroots Fundraising Journal*, elevating success stories and best-practices to support our community of social justice fundraiser organizers. Caroline Picker of Puente Human Rights Movement kicks off this issue by sharing how their community rallied together to raise over \$100,000 in just six weeks, enabling them to purchase a place of their own. Next, Dan Shephard encourages us to rethink traditional planned giving programs in favor of gift planning programs that can include all types of outright and deferred gifts. We follow with an excerpt from Thomas Wolf's book, *How to Connect with Donors and Double the Money You Raise*, which underscores the importance of maintaining our integrity while building relationships with challenging donors. Ezra Berkley Nepon and Kris Hermes close out the issue with an inspirational case study of activists raising \$200,000 for bail and legal defense costs of protesters arrested during the 2000 Republican National Convention, and share fundraising tips to support your direct action organizing.

I look forward to meeting many of you in the coming months. Until, then, I invite you to imagine and build with us as we work to grow the base of people developing grassroots funding strategies for long-haul movement building work.

*Crystal*



Puente members at the opening celebration in Puente's new home in August 2014.

# Planting Roots for the Migrant Justice Movement in Phoenix

By Caroline Picker

**ON ANY GIVEN MONDAY EVENING**, pink streaks from another spectacular Phoenix sunset light up the sky as cars pull into the Puente Human Rights Campus, a former church and the accompanying pastor's house. A table of member-organizers just inside the front door of the community room greets newcomers and returning faces alike to our weekly member meeting. In the courtyard, community members sell snacks to raise funds to pay bonds for people held in immigration detention. Arriving kids take off running to the childcare room and pull out blocks, kickballs and puzzles with friends they haven't seen since last Monday. Bags of fresh produce harvested from the on-site community garden are handed out to those who want them.

Slowly, the community room fills up with 60 to 100 people ready to tackle their kind of work: sharing information about neighbors and friends who are currently getting arrested and sent to ICE; assigning who is setting up the sound system and distributing water at the next march; strategizing how to put the final nail in notorious Maricopa County Sheriff Arpaio's coffin; and

envisioning the next steps in the fight against Arizona's draconian anti-immigrant policies.

In a different room on site, a group of youth are planning their next photography project to stop the unjust separation of families and snapping portraits of the people lingering around the snack sales table. Elsewhere, volunteer artists and designers are silk screening posters for actions happening around Phoenix relating to various social justice issues. The Uno por Uno (One by One) legal clinic is conducting consults with people with loved ones in detention or facing deportation themselves, planning deportation defense campaigns, and teaching people how to fight their own cases.

Just two blocks away, the Arizona State Capitol and the Governor's tower are visible from the Puente parking lot. These are the offices of former Governor Jan Brewer who signed SB1070 into law and the legislature which in previous sessions proposed new racist bills almost every day. These offices are where the policy of "attrition through enforcement" was enacted, which aimed to make life so miserable for undocumented immigrants that they



self-deport. These policies stripped away public benefits, in-state tuition, language access in public education, and the ability to work, all while ramping up legalized racial profiling and the enforcement dragnet that sends people to jail for corporate profit. These are the very policies that those meeting down the street at Puente have been steadfastly working to dismantle.

A year ago, these Monday night meetings happened in a tiny two-room office with one bathroom that the landlord never fixed. The kids played among cars in the crowded parking lot. The church with which we shared a wall often blared synthesizer music during services that filtered in and drowned out our conversations. We had outgrown our meeting room: people crammed in the doorway and lined up outside, trying to hear and participate in the strategizing going on inside. The one desk partitioned off from the main meeting space wasn't separate enough for Uno por Uno legal consults to happen at all.

It was clear that we needed a place as large as our dreams, or at least large enough to nurture them into fruition. The idea of owning our own space was always in the back of our minds but seemed unrealistic if not impossible. Because of our members' low incomes and exclusion from the work force, it was hard to imagine the idea of raising enough money to be able to put down roots in this way. We looked into bank loans but weren't eligible to borrow an amount large enough. The predatory interest rates were another barrier given our budget, existing resources, and fundraising capacity.

However, as a result of a successful capital campaign, we signed a mortgage and made a down payment on a new building in June 2014. Purchasing our own building has allowed us to dream bigger, to envision the work we have ahead, and grow our community's power with our roots firmly planted. Owning property so close to the seat of those who have attacked us is indicative of how far we have come in our struggle and symbolic of our vision for justice.

## About Puente

The Puente Human Rights Movement was founded in 2007 in response to the first "secure communities" agreement between police and federal immigration authorities in Arizona. This agreement led to cruel attacks on our community, with Arpaio launching raids in neighborhoods and against day laborers. Since then, we have always prioritized the leadership of those most impacted by anti-immigrant policies and laws. We develop, educate and empower migrant communities to protect and defend our families and ourselves.

When we build our community's power to overcome fear and to come out of the shadows as undocumented, we throw a literal and metaphorical cog in the deportation machine. We work to build a community of resistance and a culture of inclusion through which marginalized migrant communities can enter into the public debate and engage in improving our communities. In just a few short years, many of our members have gone from

being scared of leaving their houses to organizing actions and events, conducting outreach and education, leading programs, and participating in civil disobedience.

## The Possibility of Owning a Building

Doors opened to allow us to really consider owning our own building just months before it became a reality. While staff were driving some visiting supporters to the airport, we casually mentioned the possibilities that purchasing property would open up for us. This led to a relationship with a donor who was newly inspired by our work and looking for a community-based investment of a significant sum of money. After several phone conversations with us, she agreed to offer us a mortgage for \$350,000, the bulk of the money it would take to purchase a building, with the lowest IRS-required interest rate. We started looking at possible spaces that day and found the one we would eventually purchase within a week. We met a new local supporter who worked in commercial real estate who personally donated to cover all of our closing costs as well as finding us an inspector and a real estate attorney who donated dozens of pro-bono hours. Through this process, we relearned one of the key lessons of organizing: share your vision as often and with as many people as possible.

## \$75,000 in Seven Weeks

Once we found the perfect property with a mortgage from someone who shared our values and was committed to prioritize community benefit over monetary returns, we had the task of raising \$75,000 to cover the remaining cost of the building in seven weeks, when our current lease expired. This number was extremely daunting to us, even though fast, short-term fundraising is what we had learned to do best. Because of the crisis of enforcement and deportation, we frequently find ourselves in the position of having to raise between \$5,000 and \$15,000 within a matter of days to pay for our members' bonds to secure their release from detention. But this was something different: How do we fundraise not for an immediate crisis, but for our long-term vision of ending that crisis once and for all?

So we did what we always do: At our next member meeting, we discussed the possibilities of owning our own space and what it would mean for us. The enthusiasm was palpable in the room as people started shouting out ideas: space for our growing membership to meet and hear each other; childcare and after-school programs that prioritized empowerment and culture; more than one bathroom; a worker-owned silk screening studio to create just jobs; housing for people released from detention; and application drives to help people apply for deferred action. It was immediately clear that even as the crisis continues, having a rooted location from which to grow our work was a critical part of strengthening our ability to fight back. Our members already talked about Puente as extended family; now they would start proudly talking about the new building as home away from home, a place of belonging.

## JUST LIKE OUR MEMBERS ARE TOLD ONLY LAWYERS CAN STOP THEIR LOVED ONES' DEPORTATIONS, WE INHERIT THE BELIEF THAT ONLY RICH PEOPLE CAN GIVE.

Through a wide variety of gifts and the hard work of many, we were able to pass our fundraising goal of \$75,000 and raise \$100,000 in just six weeks. In addition to food sales, yard sales, car washes, and our goodbye party from our old space, these funds were raised from almost 200 individuals, many of whom were first-time donors to our organization.

Here are some key lessons we learned during this capital campaign:

### **Get everyone involved, and value all levels and types of gifts.**

We started this campaign without a staff member dedicated to fundraising, so we relied largely on volunteers. Our members organized collective yard sales, sold tacos in their neighborhoods, washed cars on Sunday mornings, and passed a hat in weekly meetings. Our staff, board and dedicated volunteers all challenged themselves to make new kinds of asks in new kinds of ways. In our weekly fundraising committee meetings, we equally recognized someone who earned a large gift from a major donor and someone making their first ever fundraising phone call. We used social media, our email list, phone calls, video conferencing, and one-on-one meetings to reach previous and new donors. One quarter of the gifts we received were less than \$25. Our new home wouldn't have been possible without every penny that was contributed in every kind of way.

**Let the work speak: Communicate with vision.** We called our capital campaign "Sembrando Raíces" ("Planting Roots" in English) because that is what owning a building would allow us to do. We consistently reiterated this vision as part of our political platform against criminalization and deportations when we made individual and bulk asks through social media and email. We knew it was this compelling vision that would inspire people to give. We used graphics, including a donation thermometer in the shape of a corn plant, and videos, in which our members spoke about what Puente means to them and what a new building would allow us to do. We wanted everyone who gave to understand what they were becoming a part of with their gift.

**Engage existing donors as organizers.** Just as we cultivated leadership in our members, we cultivated leadership in our existing donors, asking them not to just increase their gifts but to fundraise and organize their networks to support our capital campaign. A previous local donor threw a house party for us, inviting friends who had never before considered supporting the migrant rights movement. Three others who lived out of state fundraised among their networks via emails, phone calls, and a video conference in which Puente staff presented about our work and the new building. These three supporters collectively raised \$35,900 from over 30 donors, most of whom were new to giving to our organization.

### **A Place to Call Our Own**

At our first Monday night meeting in the new space, we talked about the layout of the building, realizing how much room we still had to fill even once each of our existing programs had a designated space. Sitting on the pews that we hadn't removed yet, with a baptismal pool still in place, we planned the murals that would cover the former church walls. Within a month of moving in, we painted the walls and transformed the space from a church into our home. Dozens of members put in countless hours of work. Repairs, lights and signs were taken care of by our community. Even if sweat equity couldn't buy us a building, it would clearly help us maintain it. Our new home enabled us to host the first annual Arizona Statewide Human Rights conference, as well as a human rights tribunal to document testimony of the abuses experienced by Arizonans in order to bring them to the UN.

These convenings were a small taste of what we continue to build in Phoenix: an organizing hub and community space that hosts cross-movement dialogues, cultural events, and local and national gatherings of groups who share a similar mission. The benefits far outweigh the extra administrative work of owning property: We have a reliable new funding stream in the form of rental income; we have a unique resource to share with Phoenix movements as the only organizing-based space in our area; we have sufficient space for our programs and offices, which can continue to grow for years to come; and, most importantly, we have a place for our community to proudly call home, amidst a climate of racism and hate in Arizona. When our sister organizations come to visit, they ask how we made this possible, and if our mortgage lender has a cousin because they want to figure out how to do something similar in their town as well.

Just like our members are told only lawyers can stop their loved ones' deportations, we inherit the belief that only rich people can give. And while it is true that we couldn't have purchased this building without major donors who share our values, we wanted to break the idea that we can't own. Our community can raise money and can give dollars, time and labor to lay the foundation and build the infrastructure that enables our movement to grow. Our experience has taught us that true change will come only when impacted communities organize, act and speak for themselves. What's true for organizing is true for fundraising as well, and we have a place of our own to prove it. ■

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Caroline Picker is the communications and development director at the Puente Human Rights Movement in Phoenix.



# Two Steps to a Successful Planned Giving Program

By Dan Shephard

**CONGRATULATIONS!** You're convinced the time has come to start a "planned giving" program for your nonprofit. This is a sign of aspirational growth and organizational maturity. But please take a moment, before you read further, to use the space below to write down your organization's definition of a "planned gift."

Now, please turn the page.

Our GIFT to you!  
Get **neon** CRM  
**FREE** through  
**2015**

Details at  
[neoncrm.com/gift](http://neoncrm.com/gift)  
888.860.NEON or [sales@z2systems.com](mailto:sales@z2systems.com)



Proud  
supporter of



You just defined your goal from your perspective, which is valuable. This definition will represent part of any gift conversation. Take a moment now to put yourself on the other side of the coffee table and write down what you believe the typical new possible donor's definition of a "planned gift" might be.

I hope this gives you food for thought, and cause to pause. Consider my own definition of a planned gift, which is based on my conversations with hundreds of potential donors: A planned gift is one that requires forethought by the donor, and usually the participation of one or more allied planning professionals (lawyer, accountant, realtor, investment broker, etc). Note that words like "outright" and "deferred" do not appear in this definition.

Now you're ready to consider my two steps to start a planned giving program for your nonprofit.

### Step 1. DO NOT Start a Planned Giving Program

Several months ago I received a request from Western Wildlife Corridor (WWC), a small nonprofit in Cincinnati OH, to help them create a "planned giving" program. I met with the board president and asked him for clarification—just what did he mean by planned giving program? He replied, "You know, wills and trusts," and then handed me a folder of brochures he had collected from other nonprofits promoting their bequest programs.

I complimented him on his foresight and commitment to his organization's funding future, and then asked him to reconcile his focus on bequests with the organization's mission, which was land acquisition for conservation. Wasn't he interested in promoting outright gifts of real estate in addition to encouraging gifts via wills? It stopped him in his tracks. He and the rest of the board were so focused on establishing a program similar to those in the brochures they had collected that they had entirely overlooked the potential from outright gift plans.

After further discussion and research, we committed to designing a **gift planning program** for Western Wildlife Corridor, components of which are used as examples in this article.

This experience illustrates the great shortcoming with the long-standing definition of, and mind-set around, "planned giving." The narrow focus on a few deferred gift planning strategies leaves a lot of gifts on the table.

### Step 2. Start a Gift Planning Program

Development directors and executive directors of nonprofits of all sizes fantasize about the day when they will be ready to start a planned giving program. For far too many, that day never comes. Some don't know what to do first. Some assume they can't afford to start. Some are frozen with the fear of learning the legal and technical aspects of charitable gift planning.

Too many fundraising professionals believe they must become planned giving experts before they can announce that their charities seek and accept planned gifts. Too many can't even define exactly what a "planned gift" is. They convince themselves that it's beyond them. Too many believe all the parts must be in place prior to contacting prospective donors. Once this sort of inertia sets in, the potential for progress is halted.

By the way, while you're waiting and procrastinating, your prospective donors are making or updating their wills, planning to sell their businesses and retire, and converting appreciated property into income streams for retirement. They aren't waiting for you to get ready, nor are the other nonprofits they support—you know, the groups whose brochures you're looking at for reference.

### Two Steps to a Successful Gift Planning Program

Here is a proven two-step approach to starting a charitable gift planning program that includes both outright and deferred gifts.

#### Step 1. Preparation

**Draft gift acceptance policies** that address what sorts of gifts you will accept and under what circumstances. This starts with examining a menu of the traditional giving strategies—both outright and deferred—you may want to consider for your program. The menu you might choose from typically includes:

- **Real Property** (outright and deferred): Do you have the resources and willingness to conduct due diligence reviews of offered gifts of real estate, and to liquidate any accepted real estate?
- **Tangible Personal Property** (outright and deferred): What will you accept, and how will you either use or dispose of it?
- **Life Insurance** (outright and deferred): What types of life insurance will you promote, accept and acknowledge?
- **Deferred Compensation Plans** (outright and deferred)
- **Charitable Gift Annuities**: Do you have the cash reserves to back the issuance of charitable gift annuities? Are you prepared to apply for a state license?
- **Charitable Remainder Trusts**: Is your organization willing to serve as trustee? What minimum amounts will you accept if you serve as trustee?
- **Charitable Lead Trusts** (outright and deferred): Is your organization willing to serve as trustee? What minimum amounts will you accept if you serve as trustee?
- **Wills and Revocable Living Trusts**: What proof will you require that a will bequest actually exists? Draft sample bequest language to share with donors and their professional advisors.
- **Retained Life Estate**



Regardless of whether you decide to focus on only a bequest program or something more inclusive, it is vital to draft your pertinent policies regarding what gifts you will consider and under what circumstances. Only once you have written your rules and guidelines will you be able to comfortably (and safely) invite meaningful gift planning conversations with potential donors. You're welcome to refer to my sample Gift Acceptance Policies, available on my website at: [thefrontlinefundraiser.com/resources](http://thefrontlinefundraiser.com/resources).

**Create basic marketing materials** that might include a brochure, announcements in your newsletter or magazine, and/or a modest addition to your website. Base your design on those gift planning strategies you choose to pursue and accept. The layout and copy of the brochures you collect and the websites you visit are valuable references, but be careful not to let them influence you to focus on too narrow a perspective.

**TIP:** Assign each member of your governing board the task of bringing you samples of the promotional materials they receive in the mail from other charities they support. Ask each to provide the URL addresses of their favorite nonprofits' giving websites. Don't lose sight of the fact that those other charities your board members also support already have their gift planning programs in place. You don't want to be left out of the conversation a day longer than you have to in order to get in the conversation.

Components of your marketing materials (print and electronic) might include:

- **A simple, focused introduction/invitation.** This simple copy appears at the top of both the giving brochure and giving website of Western Wildlife Corridor. Note that reference is made to gift plans both outright and deferred.

*When you donate to Western Wildlife Corridor you help people in our community protect the lands that enrich your life—protecting natural habitats for flora and fauna, contributing to clean air and water, and inspiring you with natural beauty.*

*Your contributions may be in the form of annual sustainable gifts, special gifts to acquire and maintain property for preservation, or to permanently endow our mission of protecting and preserving the Ohio River Corridor.*

*Thank you for exploring how you can support Western Wildlife Corridor.*

- **Donor endorsements.** These illustrate to readers what others have done and the benefits to both your organization and the donor. Here are a couple of examples from the Giving to Western Wildlife Corridor brochure:

"Knowing now that the property we have cherished and enjoyed for 50 years will forever be preserved with no development, no concrete, no blacktop—just natural—gives us a feeling of real joy and satisfaction."

*(Donor's name) (photo optional)*

"One of my concerns was to make gifts that didn't commit me to something I might not be able to afford in the future. Naming WWC as beneficiary of portions of two Individual Retirement Accounts was the perfect solution for me."

*(Donor's name) (photo optional)*

- **Brief explanations of your selected giving strategies.** A newsletter (whether print or electronic) is an excellent vehicle for short descriptions of various giving strategies to educate readers. Each issue can highlight a different strategy or message. Here are two samples:

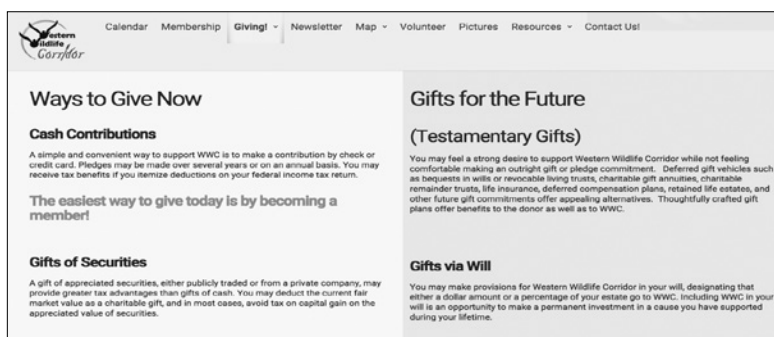
### Bequests: Simple & Safe Gift Planning

You may feel a strong desire to support Western Wildlife Corridor while not feeling comfortable making an outright gift. Deferred gift vehicles such as bequests in wills, revocable living trusts, life insurance, deferred compensation plans, and other future gift commitments offer appealing alternatives. Thoughtfully crafted gift plans offer benefits to the donor as well as to Western Wildlife Corridor.

### Perpetual Gifts

Charitable gifts designated to permanently endowed funds provide benefits to both Western Wildlife Corridor and to those visionary philanthropists who participate. The principal of a gift to establish an endowed fund is invested and not invaded; only earnings are expended for the donor's stated purpose. Endowed funds support maintenance of conservation properties and educational programs. Please consider what lasting impact you would like to have on Western Wildlife Corridor through your own philanthropy. What legacy would you like to establish through your giving?

- **A brief listing of the specific giving strategies (both outright and deferred) you have decided to promote and invite.** This, too, can be done in both print and electronic materials. A screenshot from WWC's giving web page follows on the next page.



- **An invitation/call to action.** This allows readers to request details, and you can follow up. Be sure to mention each gift strategy you have elected to pursue and accept, as well as a space for responders to inform you that your organization is already in their estate plans. (See Figure 1 below.)

**TIP:** Consider assigning pertinent components of this project to either a standing committee of your board or forming an ad hoc committee to help guide your decisions.

**Expand your donor recognition program** to include those whose gifts are deferred and endowed. A comprehensive donor recognition plan also addresses lifetime giving, providing donors multiple incentives to consider a full array of gift planning strategies. A sample stewardship plan, that both acknowledges and motivates donors, is available at: [thefrontlinefundraiser.com/resources](http://thefrontlinefundraiser.com/resources).

A key companion to this plan is your policy regarding gift valuation. Inviting a generous donor to transfer \$100,000 into

a Charitable Gift Annuity, then recognizing her for only \$87,000 due to her age can be more than counter-productive. A meaningful (to both your organization and your donors) recognition program will provide incentives for additional gifts, both during and after your donors' lifetimes. Refer to my article, "The Five Definitions of Gift Valuation," at: [thefrontlinefundraiser.com/resources](http://thefrontlinefundraiser.com/resources).

**Identify your go-to gift planning expert,** the professional who can speak with your prospective donors about wills, charitable trusts, appreciated assets, hard-to-value assets, etc. You may have an in-house expert; you may need to identify one or even several allied professionals on whom you can call as needed. At minimum, find an attorney with expertise in estate and tax law who will be available to you upon request.

**Identify your major donors/prospects.** Set your threshold amount for a minimum major gift. You may already have a dollar amount you use in that definition. If not try this:

- Sort a list of all your donors from last year in descending gift amount order; include all gifts during that year from each donor.
- Go down the list until you reach 75 percent of the total dollars given, then count the number of donors at that point. If it's too many to manage, move up the list to identify the number of individuals and key institutional donors you choose to manage as your major donors.
- Give yourself permission to add the names of others you

Figure 1

**IS THIS THE RIGHT TIME**  
for you to consider your special support?

Your contributions may be in the form of annual sustainable gifts, special gifts to acquire and maintain property for preservation, or to permanently endow our mission of protecting and preserving the Ohio River Corridor. **Thank you** for exploring how you can support Western Wildlife Corridor.

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

Address \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_

E-mail \_\_\_\_\_

- I am interested in learning more about
  - \_\_\_ a gift of real estate
  - \_\_\_ a conservation easement
  - \_\_\_ a gift of securities
  - \_\_\_ a gift of life insurance
  - \_\_\_ a gift via deferred compensation plan
  - \_\_\_ a gift that provides lifetime income
  - \_\_\_ a gift through my will
  - \_\_\_ other \_\_\_\_\_
- \_\_\_ WWC is already in my estate plan (Please provide details)



know should be included due to leadership, gift potential, lifetime giving, etc.

- Include your board members, whether yours is a working board or a fundraising board. At minimum it will help you educate them and grow their capacity.

**Decide how much time you have and how many prospects and donors you will select to manage.** If your research identifies more names than you feel comfortable committing to, pare down the list.

- Prioritize them based on such key indicators as giving history, rated gift capacity, level of engagement with your organization, and age. Focus on those most likely to have both the motivation and the means to give.
- Consider allocating two hours per contact (travel and meeting time), and determine how much time each week or month you will commit to this vital work. Set your weekly/monthly goal for those key contacts. Give yourself permission to adjust after several months, but keep your commitment to meeting your goals.
- If you initially identify 12 board members and only 12 other major prospects to pursue, you can probably find the time to contact two of these key donors each month.  $24 \text{ names} / 12 \text{ months} = 2 \text{ contacts per month}$ , if you make only one annual contact with each.

**TIP:** A successful gift planning program is not a passive activity. In addition to the promotional materials you will share with prospects, you must actively engage them in order to invite gift planning conversations. Otherwise, what's the point of starting?

## Step 2. Execution

**Identify opportunities for contact and cultivation.** Start on this now, not after you complete your to-do list from Step 1.

- Identify reasons to contact—plan a special meeting with a particular donor or prospect based on your realization that this person ought to be visited due to gift potential, gift anniversary date, birthday, etc.
- **TIP:** Plan to personally visit and thank any donor of \$1,000 or more; learn what's behind that \$1,000.
- Invite potential donors to or meet up at special events (including scheduled activities in your stewardship program).
- Determine frequency of contact—anywhere from annual to monthly. Refer to your highest rated prospects for future gift plans, and decide who warrants your individual attention.

**Design a plan to make those contacts.**

- At identified events, special invitations can be sent in groups or individually.

- At minimum use events as an occasion to thank and inform them.

- Decide before each thank you or stewardship contact if it's a good time to discuss a new gift. Look for opportunities.

- Your objective should ALWAYS be to look for the next gift.

**Start inviting conversations about charitable gift planning with your prospects.** Remember that your prospect's definition is the one that matters; don't limit yourself.

- Invite gift conversations, not planned gift conversations. Don't ask about will bequests; ask about gift motivation.

- Proactively seek the gift that is available, whether outright or deferred. The gift plan is the plan that gets the gift. If the best plan happens to be a gift via will, then that's the gift plan. If it happens to be the transfer of \$10,000 in appreciated securities, that's the gift plan. Those who tell you (because you asked) that they are promising candidates for charitable gift planning may very likely become the first donors to your gift planning program.

**Refer to your gift acceptance policies** on those giving strategies you discuss with a prospect to decide if you can accept the gift being discussed.

**Seek help** from your identified gift planning expert as needed. Participate in those conversations, and take full advantage of these learning experiences. You'll be utterly amazed at how competence breeds confidence, and how confidence builds your fundraising capacity.

**Complete any required gift documentation.** After all, you just closed a gift! Go out and celebrate, then do it again tomorrow.

## A Beginner's Alternative: It May Be Okay to Start an Estate Giving Program

You may not be ready for even this modest approach to starting a gift planning program. A number of smaller nonprofits take a simple first step by focusing on a single giving strategy: starting an estate giving program.

The steps above are still valid, but you only need to pay attention to a select few of the giving strategies mentioned. Start by considering this short list of estate giving bequest vehicles:

- **Bequest via will:** There are three basic types of bequests: a specific bequest; a residual bequest, which leaves the remainder of one's estate after debts, taxes, expenses and other bequests; and a contingent bequest, which provides for a contingent beneficiary if one's first-named beneficiaries do not survive. Sample will language (see below) for each type can be included in your promotional materials.

**Specific Bequest:** "I give, devise and bequeath all my right, title, and interest in and to (describe the specific property—

real, personal, securities, other) to \_\_\_\_\_ or,  
 “I give, devise and bequeath (insert dollar amount or percent of estate) to \_\_\_\_\_.”

**Residual Bequest:** “I give, devise and bequeath my residuary estate, which is all the rest, residue, and remainder of my property, real and personal of every kind and description and wherever located (including all legacies and devises that may for any reason fail to take effect), belonging to me at the time of my death or subject to my disposal by will, to \_\_\_\_\_.”

**Contingent Bequest:** “If the above-named beneficiary predeceases me, then I give, devise and bequeath such amounts or property absolutely to \_\_\_\_\_.”

- **Bequest Beneficiary of Life Insurance:** Charity may be made the beneficiary of a policy if the policy owner asks the insurance company for a Change of Beneficiary Form and names charity as beneficiary of all or a portion of the policy.
- **Bequest Beneficiary of a Deferred Compensation Plan:** Charity may be made the beneficiary of a plan (Individual Retirement Account, 401(k), 403(b), etc.) if the plan owner asks the plan administrator for a Change of Beneficiary

Form and names charity as beneficiary of all or a portion of the plan.

- **Bequest of a Donor Advised Fund (DAF):** The donor who has established a DAF may make provisions for its eventual distribution to one or more named charities. You can request/suggest that your nonprofit be named the final beneficiary of the DAF.

Even if you decide to start small, with only an estate giving program, begin with your end in mind. Schedule a review of your new gift planning program after six months or a year. Assess what’s working, what needs attention, and how you want to expand your program. Look for opportunities to open the giving door wider as your capabilities and resources grow. Aspire to as full a menu of giving opportunities as makes sense during each periodic review.

Dan Shephard is the founder and Principal of The Shephard Group, through which he provides training and consulting services focusing on frontline fundraisers. He is the author of *Charitable Choices—How to Avoid Donor’s Remorse*.



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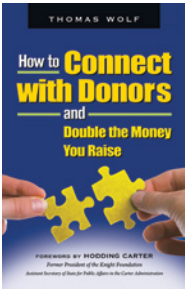
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# But I Can't Stand the Fellow!

By Thomas Wolf

*This article is adapted from Thomas Wolf's How to Connect with Donors and Double the Money You Raise, available at [bit.ly/1IZvdfx](http://bit.ly/1IZvdfx). ©Emerson & Church, Publishers. Use promo code GRF at checkout to receive FREE SHIPPING on new orders through 7/31/15.*

**THERE WAS NO QUESTION STEPHEN HAD MONEY**—lots of money. The way he threw it around when he came to town, there was no mistaking the fact that he intended to use his largesse to establish his clout. I had little to do with him until one day he phoned. He'd heard about the work of our organization and had an idea. He thought it would be very worth my while to meet with him.

Since Stephen was the talk of our small town, I mentioned to a few people that I was going to see him, and the response was always the same: "Be careful." But I was simply going to meet Stephen, have a tour of his renovated house, and hear him out. That was all. I knew how to deal with people like him, and I knew how to say "no."

I visited Stephen and was impressed with his house, one of the most historic in town. But once he started talking about himself, discomfort set in. He spent a lot of time telling me about his seven homes, his private plane, his two sailboats each with its own crew. He was the kind of fellow to whom I take an instant dislike. But he had money, and he was making it clear that if I played my cards right, my organization could have some.

Overly friendly, I feigned interest and expressed admiration where the cues were obvious. Later I professed friendship and went to his house when summoned. In the end, my organization received his money, one of our largest gifts ever. I was cautiously pleased and so were my trustees.

But no sooner did we receive his gift than I got a lot else besides it. Phone calls came at unexpected hours filled with advice, much of it impractical or downright loony. Conversations were often spiced with derogatory comments about friends and associates I respected. I wanted to rebut Stephen but felt awkward, and then felt even worse about my cowardice for not doing so. At the end of the year, he offered even more money, and I had to make a decision. I went to some valued trustees to seek their advice.

Interestingly, the board was split. One of my trustees, old and wise, said we should take the money. "So you have to put up with some bizarre behavior. It's part of your job." He recalled a similar situation on another board where the headmaster came to him complaining about a donor whose money was gained in a shady manner. "It's tainted money," said the headmaster, "and it doesn't feel right." My board member shot back: "The only tainted money is the money we taint got."

But the majority of my trustees saw how uncomfortable I was. More importantly, there was growing talk in the community and among other donors that this wasn't a good situation for us. Stephen had a checkered reputation. They urged me to walk away, and in the end I did so, leaving a large sum on the table.

My experience with Stephen points to a dilemma about our relationships with some of our donors. Good fundraisers have to be willing to be friends with their donors and to build strong relationships. But should we play nice with people we really can't stand? How authentic are we if our "friends" include people like Stephen? Or should we simply admit that these efforts are manipulative ploys to secure money and not worry about it? What is our responsibility to our organizations, to the donors, and most importantly, to ourselves?

As one donor whom I asked to join my table at a fundraiser said out of the blue, "My husband told me tonight, 'Watch out, they're just after your money. They'll pretend to be your friend, but just know what they are after.'"

Sitting next to her I felt odd. Sure we wanted a gift from her. But I thought the evening was fun for both of us, and we were having a good time. Should I have felt guilty?

Everyone is suspicious of the sycophant who lavishes praise in advance of asking for money. But what of the fundraiser who goes about the process with subtlety and skill? Should we be even more on our guard? Is there any way to tell when people are being authentic?

This, perhaps, is the crux of the issue. When we're inauthentic, donors can tell. But the opposite is true as well. When we act with integrity, it comes across, especially as donors come to know us.

My friend, Andrea Kihlstedt, an exceptional fundraiser in her own right, makes an interesting and important distinction: "We can be kind and gracious in the face of challenging behavior. That's okay. But we shouldn't try to become everyone's friend or pretend we enjoy working with donors who are troublesome. In the end, maintaining our integrity may be the most important thing that keeps us from growing cynical."

I agree wholeheartedly. ■

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Dr. Thomas Wolf is principal of WolfBrown, which assists nonprofit organizations and the philanthropic sector.



ART BY MORGAN FITZPATRICK ANDREWS

# Fundraising for Direct Action & Legal Defense

## A Case Study of the 2000 RNC Protests

By Ezra Berkley Nepon & Kris Hermes

*This article was originally published on Interface: a journal for and about social movements. [interfacejournal.net](http://interfacejournal.net)*

**THE YEAR 2000 SAW THE PRECIPITOUS RISE** of the global justice movement. Following the Nov. 30, 1999 protests against the World Trade Organization in Seattle, mass demonstrations erupted in resistance to the IMF/World Bank in Washington, DC (April 2000) and Prague, Czech Republic (September 2000). The December 2000 U.S. Supreme Court ruling in *Bush v. Gore* marked the beginning of eight long years of President George W. Bush. Less known, however, are the groundbreaking and foreshadowing events that unfolded in Philadelphia during the July/August 2000 protests against the Republican National Convention (RNC).

That summer, under the authority of then-Philadelphia Police Commissioner John Timoney, local, state and federal governments colluded to violate laws protecting free expression. Timoney used Philadelphia as a laboratory to develop our contemporary form of political policing, later coined the “Miami Model” after the brutal police response to the 2003 Free Trade Area of the Americas protests, carried out by then-Miami Police Chief Timoney. For the police, the RNC protests in Philadelphia offered the opportunity for a trial run of a repressive strategy that has since become

the norm. Philadelphia police violated protesters’ human-rights through beatings, preemptive and mass arrests of more than 400 people, and levying serious felony charges against nonviolent demonstrators.

At the same time, activists from several social movements came together in creative and determined ways to challenge this repression. Once arrested, RNC protesters defiantly refused to give their names, jamming up the booking and charging process in a moving and resolute example of jail solidarity. Activists maintained their collective resistance despite further violence perpetrated against them by jail authorities. And after they were released, hundreds of activists filled the courtrooms to keep the pressure on.

None of this would have been possible without the underlying legal support and fundraising apparatus that achieved unexpected results. R2K Legal, an activist and defendant-led collective, organized hundreds of people to engage in court solidarity to politicize trials, build support, and fight the charges. In a very short period of time, before the advent of social media and online crowdfunding tools, activists managed to raise \$200,000 for bail and legal defense



## FRUSTRATED THAT PLANS FOR AN UNFETTERED POLITICAL CONVENTION HAD BEEN FOILED, THE POLICE ACTED OUT BY ASSAULTING AND ARRESTING HUNDREDS OF PROTESTERS.

costs. How did a scrappy radical protest group raise so much money in so little time? What worked, what didn't work, and how can we use these lessons in our fundraising work today? What follows is a case study of the RNC 2000 protests, nearly 15 years later.

### Funding Direct Action Organizing

The Aug. 1 Day of Direct Action against the RNC was designed to include a major march with floats and giant puppets, while a series of smaller affinity groups attempted to block major intersections in the city to tie up traffic and put a stop to business as usual. The protests were organized to resist a number of foreign and domestic policies, with a special focus on the expanding prison system in the U.S. Fundraising for the costs of these protests began in May 2000, with a draft budget of \$30,000, which included:

- *Outreach and education*: printed materials, postage, phones, informational event costs
- *Communications*: cell phones, website, press release, flyer distribution
- *Logistics*: food, water, convergence space, welcome packets, loaner bicycles
- *Medical support*: first aid supplies, other protective gear
- *Legal support*: office space, phones, other office equipment
- *Travel scholarships*
- *Fundraising costs*

There were no plans for a bail fund because Philadelphia police did not have a track record of requiring bail for arrests at demonstrations.

The Philadelphia Direct Action Group (PDAG), which was largely responsible for organizing the Aug. 1 Day of Direct Action, encouraged people around the country to organize benefits, house parties, group endorsements, and other methods of grassroots fundraising in order to raise enough money to cover the projected budget. Local and regional activists got creative too, putting on fundraising events that drew attention and much-needed money to the mobilization in the final month before the protests.

Besides events, most of the money PDAG raised came from individual donations by supporters sending in checks, which were solicited by letters, flyers, in-person conversations, and email lists. PDAG also applied for and received several small grants.

In order to build its fundraising capacity and keep things moving, PDAG delegated complete fiscal authority to a fundraising

committee. While this structure enabled us to get the job done, the relaxed level of oversight made the fundraising committee vulnerable. Hindsight taught us that if any members of the committee had been dishonest or ill-intentioned, it could have been disastrous.

In order to receive tax-deductible donations, PDAG needed a nonprofit organization to act as a fiscal sponsor. In the final weeks before the protests, we changed fiscal sponsors three times in search of a stable fundraising “home.” These quick transitions came in response to complex logistical demands: PDAG’s fundraising team needed a high level of autonomy and access to funds on short notice in order to serve the fast-paced organizing.

### All Hands on Deck! Raising Funds in a Time of Crisis

On Aug. 1, the big day of direct action protests, Philadelphia was in a state of pandemonium. With the help of undercover infiltrators, police raided a West Philadelphia warehouse, arresting more than 70 people inside, and seizing puppets, signs, banners and other protest materials before the activists could even hit the streets. Meanwhile, protesters filled the streets and blockaded several of the city’s major intersections for hours, interfering with the transportation of delegates to the convention site. Frustrated that plans for an unfettered political convention had been foiled, the police acted out by assaulting and arresting hundreds of protesters.

Aug. 1 was also a time of crisis for PDAG, as our bank account was in the red. Despite strong fundraising efforts, the group had failed to reach our goal of \$30,000. As the protests began, we did not have the money to reimburse expenses that people had put on their personal credit cards. With downtown Philadelphia under police siege, more than 400 protestors were in jail being held on bails ranging from \$3,000 to \$1 million—and PDAG had no money in the bank. This was an “all hands on deck” moment. And we had to ensure that the group’s only designated check-signer stay out of jail.

On Aug. 5, the newly formed R2K Legal Collective sent out its first email fundraising appeal, which read in part:

*Activists who came out to the Philly streets to make their voices heard, to demand a response to the issues of police brutality, the criminal injustice system, and the brutal effects of corporate globalization are being met with inhumane and torturous conditions in Philly jails and prisons. Our first priority is to get*

*people out of these conditions—and that means an urgent push to raise bail funds and legal fees. We are asking people to make donations, to organize benefits, to ask everyone you know to give to this fund. This is a way you can contribute whether or not you live in Philly: by helping us get people out of jail.*

Emergency calls for funds were sent out over email, posted to various websites, and spread through countless letters and phone calls. People were encouraged to send checks, donate online, and wire funds. Some people earmarked their contribution for a particular arrestee, often those with serious felony charges. In a very short period of time, we received hundreds of donations. Ironically, after the scramble to find a fiscal sponsor, most of the donations were used for legal fees, which are generally not tax-deductible.

We experienced incredible generosity and solidarity from all directions. One \$8,000 contribution was handed off to a fundraising team member at a concert in New York. Another supporter mailed in a \$2 money order from a small town in the Midwest. A political prisoner sent a letter of support along with a modest donation. It was a powerful example of everybody giving what they could.

Quickly following the mass arrests of Aug. 1, several foundations gave sizable grants, including Bread and Roses Community Fund, Tides Foundation, Funding Exchange, and Peace Development Fund. We also received a number of emergency loans to support the bail fund—\$30,000 in total—all of which was paid back within a year. Complementing these grants and loans, we received a staggering array of in-kind donations, including phones, fax machines, printers and other office supplies, as well as basic necessities like food, water and toiletries.

### Distributing Bail Funds

In order to pay bail in Philadelphia and many other U.S. jurisdictions, you need sizeable assets. Without a house or other valuables to use as collateral for bail, protesters could still be released with 10 percent of the bail amount in cash and a “surety”—someone local who would be responsible for ensuring that the defendant showed up in court. As a result, the fundraising committee had to collect and manage huge amounts of cash, presenting a considerable challenge in an era before widespread use of online banking and other electronic financial services.

It was difficult to find people who were available and willing to transport large amounts of cash (up to \$10,000) to pay bail. With numerous key organizers swept up in the mass arrests and a frenetic, understaffed environment in the legal office, the process of bailing out protesters broke down. R2K Legal often sent whoever happened to be around to pay bail, including one new person who was previously unknown to organizers. A couple of organizers were making gut decisions about how trustworthy people were. Although all of the funds earmarked for bail made it to their destination, a few of the surety signers disappeared, and, as a result, some bail payments were never returned after the trials concluded.

### Transition from PDAG to R2K Legal

Within a few weeks after the mass arrests, organizers recognized that the legal defense process would require a multi-year strategy and a structure to coordinate support. Many of the PDAG organizers and participants were now also co-defendants, and the PDAG structure was not designed to outlast the demonstrations. To move forward, R2K Legal created a new fundraising committee, which quickly drafted a budget and began to develop ways to solicit funds for the more serious criminal cases and to pay back people who had loaned money for bail. The budget was an ambitious \$200,000 and included costs for office space, utilities, equipment, phone and internet service, investigation fees for the more serious cases, evidence maintenance and research, attorney fees, an elaborate outreach effort, and media work. While most legal workers and lawyers volunteered their time and skills,



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nominal stipends were briefly provided to a handful of people. Over time, line items on the budget changed considerably as the legal needs became clearer, but the overall amount of \$200,000 remained relatively unchanged.

In order to sustain contributions to the legal support effort after the crisis of freeing jailed protesters was over, activists held countless fundraisers across the country and as far away as Berlin, Germany. From mud-wrestling parties and poetry readings to puppet shows and concerts, thousands of dollars were raised in the months after the protests. The Boston Philly Defense Group (reformed as the Boston Activist Defense Association, or BADAss) organized a few events, including a concert and a house party for wealthy donors, which netted more than \$4,000. There were also several educational fundraisers in smaller cities from Bethlehem, Pa. to Fort Bragg, Calif., which raised hundreds of dollars and garnered media attention in local papers.

Locally, Philly activists and supporters of the legal defense effort organized an amazing array of fundraising events, which served multiple purposes: raising money, building a culture of solidarity, and boosting morale. Here are a few examples of these events:

- The Philadelphia chapter of the National Lawyers Guild (NLG) and the radical bookstore Wooden Shoe Books organized a fundraiser featuring a talk by civil liberties watchdog and author Chip Berlet entitled, “Dissent and Surveillance: Protecting Civil Rights and Civil Liberties.”
- Several screenings of the award-winning, one-hour documentary *Unconventional Coverage* were held as fundraising events across the city. The film, which was produced by BiG TeA PaRtY and subpoenaed as evidence by the Philadelphia District Attorney’s Office, featured Elizabeth Fiend, the host of Philly’s only anarchist cable TV show.
- In January 2001, The Virgin Bride Cabaret included poetry, puppetry, dancing, live music, and an “eye-popping” fashion show featuring a dozen naked male RNC arrestees (and friends) who were all modeling floral and fruit-decorated mirkins (pubic wigs).
- A couple of weeks later, in the middle of a snow storm, supporters hosted “Pancake Palooza.” Inspired by a similar event in San Francisco, which raised \$2,200 for R2K Legal, the Philly Pancake Palooza brought together an array of artists who shared politics with the protesters. For five hours and a suggested donation of \$10 to \$100, the Palooza offered an all-you-can-eat pancake extravaganza.

Some money also came in from unexpected sources like record labels. RNC arrestee and musician Christopher Perri devoted part of his CD proceeds to R2K Legal. Sub City Records also agreed

to donate five percent of the retail price of every record sold by Adam and His Package for more than a year, directing hundreds of dollars to the legal support effort.

## IT WAS A POWERFUL EXAMPLE OF EVERYONE GIVING WHAT THEY COULD.

### Nurturing the Donor Base

In the first six months after the protests, R2K Legal raised about \$130,000. Most of that money came from individuals, many of whom sent attached notes offering solidarity, love and support. This inspired us to put thought and care into sending thank you letters to all of our supporters. We made a card with two woodcut images, designed by Dalia Shevin and Morgan Andrews, activists involved in the RNC protests. One image displayed the words, “Your heart is a muscle the size of your fist, keep loving keep fighting,” and the other featured a flying monkey wrench emblazoned with the word “liberation.” A quote by Audre Lorde accompanied the images: “When I dare to be powerful—to use my strength in the service of my vision, then it becomes less and less important whether I am afraid.”

Gradually, as interest in the RNC protest fallout began to wane, the fundraising working group shifted focus from fundraising events to targeted direct mail campaigns. Although it was somewhat unusual to send follow-up asks to donors from an emergency solicitation, we believed that our donors also cared about the long-term legal battles and the social justice movements at the core of our work. R2K Legal sent a mailing with return envelopes enclosed to hundreds of donors, giving them a legal update and an explanation of why funds were still needed. Hundreds of additional dollars were mailed in.

As we approached the one-year anniversary of the mass arrests, we were close to meeting our goal of \$200,000. One of the last formal fundraisers was held July 18: “Freedom Breakfast,” a \$100-per-plate fundraiser. There was a lot to celebrate at that point, given the overwhelming criminal court victories, but R2K Legal needed money to launch our civil suit effort against the City of Philadelphia. The Freedom Breakfast invitation encouraged prospective donors to hold the city accountable for its “overreaction and malicious conduct resulting in major civil rights violations and the suppression of dissent.” Former defendants spoke, as did an R2K Legal attorney and the National Organization for Women’s Pennsylvania chapter president.



## Fiscal Closure

In the end, more than \$200,000 was spent on criminal defense, civil litigation, legal fees, and office expenses. R2K Legal even paid travel costs for defendants and their witnesses, though many young activists also received travel grants from the Rosenberg Fund for Children. Long after the criminal cases and civil lawsuits were resolved, R2K Legal still had about \$15,000. Some of the remaining money was used to print thousands of “Know Your Rights” brochures, and some of it funded a website for the nascent Philly legal collective, Up Against the Law. A portion of the money also went to support another one of the mass mobilizations happening at the time. By 2008, the account had been whittled down to \$5,000, at which point the current R2K Legal treasurer carried out the will of the collective, giving the remaining funds to the lawyers who did the bulk of the R2K Legal pro-bono criminal defense work.

## The Legacy of Fundraising for the RNC 2000 Protests

The legal fallout from the RNC 2000 protests lasted for almost 10 years. Hundreds of activists fought their excessive charges and were vindicated in the courtroom, in the mainstream media, and among the general public. By the time the last trial occurred, more than 90 percent of the cases had been dismissed. More than 40 activists had been charged with serious felonies, but in the end not a single person was convicted of a felony. This powerful legal success story was accomplished by the hard work of the defendants, their supporters, and a small group of committed activists who raised funds behind the scenes.

While the political and fundraising landscapes have changed in the 15 years since the RNC protests in Philadelphia, many of the lessons remain relevant to our current social change efforts. With the increased demand on activists to raise bail for comrades who are locked up as a result of increased arrests, effective fundraising is more crucial than ever. Here are a few key lessons learned that may be helpful in your direct action organizing:

**Plan ahead for your fundraising and cash needs.** This means getting structures like bank accounts in place before you need them. Running funds through a personal bank account or PayPal account will likely need to be reported as income on personal taxes, so organizational accounts are ideal. But you also need an account you can access quickly and easily 24 hours a day, seven days a week.

**Plan for fundraising expenses.** This may include banking fees and deductions that come off the top of a crowdfunding campaign (up to 10 percent), phone bills, the percentage of bail fees that don’t come back after a trial is complete, and postage and printing supplies for thank you notes.

**Assign trusted people (primary and back up people) to handle the finances, sign the checks, and hold the debit/credit cards.** These people are signing up to explicitly avoid arrest. Depending on planned activities, people who handle the finances may need or want to be off-site during a direct action event. Know that this role may last well beyond the event of a specific action. Use a buddy system when transporting cash.

**Prepare tracking documents so you can sign cash in and out of the coordinating space, and track all income and expenses.** In the chaos of activity before, during and after an action, it’s easy for funds to slip through the cracks. (For example, we found a bunch of checks between two folders, months after we had received them).

**Take the time to acknowledge and thank your donors (including in-kind donations).** The movement is a long haul, and donors who know that their support matters are more likely to stay connected.

**Remember that you are not alone, and let others know what you need.** In 2000, over 400 people were arrested. Even without the social networks we have now, that meant that 400 people’s friends, families and communities went into action to spread the word about how to support.

The fundraising experience during and after the RNC 2000 protests was trial by fire. Once the crisis of mass arrests hit the national media, our capacity to fundraise was enormous. With money coming in from all over and so quickly, we were all swept into a steep learning curve in the most successful fundraising effort we had ever undertaken. We tried our hardest under tremendous pressure, and looking back, we recognize that we desperately needed more structured accountability and more guidance. And still, the results were extraordinary: We got all of our people out of jail, and kept them out. We share this story with hopes for the same results for all who organize for direct action and legal defense! ■

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Kris Hermes is a Bay Area-based activist who has worked for nearly 30 years on social justice issues. In July, PM Press will publish Hermes’ *Crashing the Party: Legacies and Lessons from the RNC 2000*, which centers around the development of repressive policing policies and how activists worked collectively to overcome that repression.

Ezra Berkley Nepon is a Philly-based writer, grassroots fundraiser, and activist who coordinated much of the fundraising and finances for the Philadelphia Direct Action Group and R2K Legal Defense. Nepon is the author of *Justice, Justice Shall You Pursue: A History of New Jewish Agenda*, and is a recipient of the Leeway Foundation 2014 Transformation Award.

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