

# Grassroots Fundraising Journal

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## Mission & Money



Organizing & Fundraising  
Navigating Corporate Giving for Grassroots Groups  
Case Study: Advocates for Youth

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Our cover photo is from the Center for Popular Democracy's (CPD) report, *Seeding Justice: Revenue Generating Membership and Fundraising Canvassing for Community Organizing: Lessons From the Field*. Learn more about CPD's Sustainability Initiative in this issue's feature article and on their website [populardemocracy.org](http://populardemocracy.org).

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## Mission, Money & Collective Impact

**HERE AT GIFT**, we believe the way money is raised is as important as how it is spent. We try to be intentional about where our funding comes from and take into account how the way we generate resources impacts our work. In our March-April issue, we dove deep into the philanthropic waters and came up with some pearls of wisdom about strengthening effective partnerships between institutional funders and grassroots groups and movements. This issue examines two other sources of support: canvasses and corporate gifts.

We open the issue with an adapted excerpt from a recent report by the Center for Popular Democracy, *Seeding Justice: Revenue Generating Membership and Fundraising Canvassing for Community Organizing*. In it you'll learn about the revenue-generating experiments of their Sustainability Initiative, including effective best practices and key elements of success. Next, Armando Zumaya taps into his 31 years of fundraising experience to offer up his best advice for when it makes sense (or not) to pursue corporate gifts. Then, staff from Advocates for Youth, a Washington, DC-based organization that focuses on adolescent reproductive and sexual health, share how they have been able to grow their corporate sponsorship program without compromising their values.

This issue came together at the same time my LeaderSpring cohort—a brilliant and diverse group of nonprofit leaders in the East Bay Area—has been exploring questions around mission-driven funding and collective impact. I'm grateful to my colleagues and the staff at LeaderSpring for their willingness to consider these issues for their own organizations, and for deepening my own thinking along the way. For example, some say collective impact is best achieved when we work across issues, sectors and regions. This raises key questions, such as, how much political alignment is enough to partner and collaborate? How much should we focus on reforming existing systems and structures instead of building new and innovative ones that are less harmful to our communities and our planet? How can we move beyond turf wars and competition to find common ground and build our power through collaboration? Further, how can we shift from a mindset of scarcity to one of abundance and new possibilities?

The Money for Our Movements conference is one of the strongest examples I know of building collective resources and power. Grassroots leaders, consultants and funders contribute their time, expertise and money for grassroots fundraisers like us to strengthen our skills, analysis and sense of community. As workshop proposals came in, we were blown away by the brilliance and creativity of the GIFT community, and we don't want you to miss out on this year's event! Join us this August 12-14 in Denver for how-to workshops on topics including online fundraising, planned giving, and building stronger boards; a lively and entertaining debate about grassroots fundraising strategies in communities of color; and thought-provoking and inspirational opening and closing sessions where we'll explore new strategies and models to increase our effectiveness and sustainability for the long-haul. You can learn more and register today at [grassrootsfundraising.org/mfom](http://grassrootsfundraising.org/mfom). Can't wait to see you this summer!

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# Seeding Justice

## Revenue-Generating Membership and Fundraising Canvasses for Community Organizing

By Center for Popular Democracy

*The following article is an adapted excerpt from CPD's 2015 report, Seeding Justice, which can be read in its entirety at [bit.ly/1TGNnCO](http://bit.ly/1TGNnCO).*

**IN THE FALL OF 2013**, the Center for Popular Democracy and CPD Action (CPD/CPDA) launched the Sustainability Initiative in order to explore with our partners across the country various cost-effective membership recruitment models that could contribute to their greater financial resiliency. While foundation funding plays a crucial role in enabling grassroots organizations to achieve their goals, it ebbs and flows and, in most cases, comes with mandates that reflect the priorities of foundation leaders. In the wake of the 2008 financial crisis, many social justice organizations have been forced to rethink their overdependence on foundation funding.

Following the Great Recession, community organizations experienced a significant decline in funding from foundations,

which had undergone profound and widespread asset losses. The subsequent decrease in funding has set a new—lower—normal for foundation funding of social justice work. Even as American giving in 2014 exceeded the previous high-water mark from 2007, giving to public-society benefit organizations still has not returned to pre-Recession levels.

Meanwhile, giving from individuals in the United States has risen for the past five years. In 2014, individuals gave \$258.5 billion, exceeding the previous high-mark in 2007. Whereas 15 percent of total giving comes from foundations, 72 percent comes from individuals. While many of these individual donations were very large gifts (greater than \$200 million), giving by non-item-

izing individuals, who tend to give smaller amounts, grew by 4.1 percent. Yet, most social justice organizations have failed to fully leverage this revenue stream. Building a diverse funding base with revenue-generating canvass operations and small-donor programs can enable base-building organizations to scale up their work and enjoy a higher degree of institutional stability and independence.

CPD's Sustainability Initiative aims to help the community organizing sector solve the core challenges of financial sustainability and scale. In the first phase of the initiative, from May 2013 to May 2014, CPD/CPDA partnered with seven membership-based organizing groups around the country to launch revenue-generation experiments based on recruitment canvass operations and small-donor fundraising programs. During this phase of the initiative, we also interviewed key staff at organizations with successful canvass and small-donor operations to identify best practices and challenges; we created a user-friendly training manual for canvass and small-donor recruitment staff at base-building organizations; and we completed the first phase of our experiments, providing sustained technical assistance and support to our partners.

### Effective Canvassing Practices From the Field

CPD/CPDA and our partners invested in canvassing-model experiments as a means both to raise member-generated revenue and to deepen organizing relationships. Some organizations have already successfully implemented canvasses that provide a large portion of their total budgets and/or build their membership base. For example:

- The Fund for the Public Interest—the national training center for Public Interest Research Groups (PIRGs)—has a highly developed research and training program on revenue generation through canvassing.
- Maine People's Alliance has robust membership and fundraising canvasses.
- Working America has a sophisticated electoral canvass model.

In preparation for the Sustainability Initiative, we reviewed these models and spoke with key staff at 11 organizations with successful and thriving canvasses. These diverse canvasses provided the basis from which the Sustainability Initiative seeks to advance a canvassing model tooled specifically to the needs and mission of base-building community organizations.

According to the experience of those we interviewed, the best canvasses build organizational power by engaging community members in four key ways:

1. **Identifying issues and getting feedback from the community.** A robust canvass is an opportunity for an organization to speak directly with community members about issues and

campaigns the organization is working on. In particular, a canvass can invite the input of people who are not already active with the organization.

2. **Recruiting new members and developing leaders.** A canvass is a mechanism to recruit new members to the organization and identify new leaders. Almost all of the organizations we surveyed had a consistent system to rank contacts from opponent to potential leader. New York Communities for Change recruits a large portion of their new members and leaders (including several new canvass staff members) from contacts developed on the canvass itself.
3. **Building power.** Canvasses can introduce an organization to thousands of people. Those contacts may come to see the organization as a trusted advocate for their interests, enabling the organization to reach further than it might have before. Where those contacts become members, they build the organization's power even further. For example, Maine People's Alliance's (MPA) canvass has yielded members in one out of every 17 households in Maine.

"The biggest success is that we get to talk to a lot of people," says Maine's People's Alliance Executive Director Jesse Graham. "When running full steam in the summer, we have a one-on-one conversation with over 1,000 people a day. We have this paying for itself for the most part, so, at the end of the year, we not only talked to a lot of people and have gotten them to take thousands of actions, but we signed up several thousand new members. And we didn't spend a lot of money. We also are able to have the canvass support grant-funded and contract-campaign work, so we have a bigger overall staff. The canvass is also very effective in working on elections, which has allowed us to build significant power with elected officials."

4. **Raising money.** Canvasses can generate sustainable, independent income from members and from other supporters. Greenpeace, for instance, raises \$10 million—or half of its total operating budget—each year from its canvass operations. Washington Community Action Network (WashCAN) raises about 70 percent of its budget through canvassing.

### Key Elements of a Successful Base-building and Fundraising Canvass Operation

An effective canvass consistently strengthens an organization's membership and financial base, while providing leadership development opportunities. Canvass operations are challenging to set up because their success requires a number of critical elements including:

- talented, engaged canvassing staff;
- ongoing training;
- data management; and
- targeting and turf management.

We will explore two of these elements in details below. The remainder can be found in our full report.

### Talented, Engaged Canvassing Staff

The success of the canvass depends upon a strong and motivated staff, led by an experienced canvass director, who is the anchor of any successful canvass. The canvass director must be a strong manager and must be able to hire promising canvassers, train and support canvassers, provide clear expectations, and manage the administrative and data functions of the canvass. Among the organizations we interviewed, canvass directors most often were internal hires with direct experience canvassing and managing the field. They held stable, full-time positions, and few had been canvass directors at other organizations prior to taking on their current role.

While campus recruitment and Craigslist postings play a role in canvasser recruitment, the organizations we interviewed invested in developing pipelines for canvassers within their membership bases and through people who had canvassed for them before. In addition to actual interviews that help assess the candidates' mission alignment, more than half of the organizations had candidates observe or participate in canvassing as part of the selection process.

All of the organizations we interviewed are breaking from the tradition of paying low wages with no benefits to canvassers. In addition to paying better wages, some organizations also offer health care and paid sick days. The organizations found that this investment made for more successful canvasses, significantly reducing turnover and providing canvassers with a sense that their job is important to the organization. In many organizations, a canvassing job can be the entry point to a career ladder to other organizational positions.

Successful canvasses must provide clear expectations and accountability for canvassers to ensure that the operation is earning back the initial investment and generating ongoing sustainer income. All of the organizations we surveyed have weekly quota systems. While 100 percent of one-time donations are generally counted toward a canvasser's quota, organizations handle recurring or "sustainer" gifts differently. Most credit canvassers with eight to 12 months of a sustainer gift towards their quota. For example, a \$10 monthly gift might count as \$100 toward the canvasser's quota. In the absence of such a policy, canvassers are rewarded more for one-time gifts that may be less valuable to the

### The Rap

The rap is a crucial piece of all successful canvass operations. Some bigger canvassing organizations invest thousands of dollars in research to identify the successful elements of their raps. Other organizations rely on field testing and experience. In either case, raps are adjusted for each cycle of canvassing, for each issue, and for effectiveness—if something does not seem to be working, it should be changed.

Although the surveyed organizations agreed on the structure and key tactics for the rap, they varied widely on how canvassers are trained to deliver raps. At one end of the spectrum, WashCAN and Working America use a rap structure with key elements. They train canvassers on the flow of the conversation and brief them before sending them out, but encourage organizers to inflect the rap with their own style or emphasis.

At the other end of the spectrum, Take Action Minnesota drills canvassers on the rap so they know it by heart. Canvassers can then focus on other elements, such as body language and tone, while they are on the doors.

New York Communities for Change finds a middle ground, using what they call a "Choose Your Own Adventure" rap: The canvasser can decide which issue to focus on based on what they think will have the most traction with the person at the door.

organization over the long term than securing a sustainer gift.

When canvassers do not meet their quota, progressive corrections are implemented. Initial steps provide additional support to struggling canvassers. After repeated weeks of failing to meet quota, canvassers are fired. On the other hand, canvassers who exceed their quotas are rewarded in most of the surveyed organizations with proportional bonuses.

### Ongoing Training

Effective canvasses build in canvasser support through ongoing training programs, which start during the interview process. The training prepares canvassers with a deep view of the issues and with the tools to navigate a range of situations on the doors. The surveyed organizations generally followed a similar general training process:

- **Interview:** Assessing if the candidate believes in the mission of the organization. Providing the candidate the opportunity to see the canvass in action. Evaluating the candidate's ability to do the work.



- **Basic training on the fundamentals:** Training canvassers on general presence and body language when canvassing. Introducing the rap. Providing opportunities to practice and get feedback.
- **Shadowing current canvassers on the doors.**
- **Ongoing training:** Meeting for briefings before shifts. Practicing the rap and addressing new questions that arise while on the doors.

Organizations sometimes bring in other groups to provide new insights and input in the training process. For organizations just beginning a fundraising canvass, inviting those with deep canvass experience can be very valuable in helping to hone their skills. The Fund for the Public Interest and Greenpeace both have training centers that provide systematic training. The Working Families Party has an innovative model for developing canvassers' leadership. The core of their canvass operation is "the Bus," a team of 20 to 30 field managers that take turns serving as project directors. By rotating permanent leadership roles, the organization is able to develop more field managers more quickly, and less experienced canvassers see more opportunities for growth to develop.

### Case Studies of Successful Canvass Experiments

Our four most successful experiments were at New York Communities for Change (NYCC), Action United, Alliance of Californians for Community Empowerment, and Take Action Minnesota. What follows is a description of our work with the first two organizations. See more in our full report.

#### New York Communities for Change

NYCC aimed both to improve recruitment of new members through a more sustainable membership canvass and to increase its ability to engage new members as active participants in the organization. To accomplish these goals, NYCC:

- Restructured its canvass staff. NYCC shifted its canvass structure from a 12-person canvass team working part-time (\$12 hour, 25 to 30 hours a week) to a five- to seven-person canvass operation working full-time (\$15 hour, 40 hours a week).
- Increased training time and scope. NYCC increased training time with their canvass team from 45 minutes per day to 90 minutes per day. The extra time was used to train canvassers on skills and knowledge beyond basic canvass training, including more intensive campaign discussions and broader organizing training.
- Integrated the canvass with neighborhood organizing operations. Canvassers and organizers met daily to discuss local campaigns and canvassers' observations from the field.

They also focused on improving the transfer of data collected by the canvassers from the field to the neighborhood organizers.

- Focused on signing up "full NYCC members" via \$10 per month sustainers. Previously, the NYCC membership canvass focused their efforts on signing up "associate members"—one time membership between \$10 and \$60.
- Restructured the rap. Traditionally, an NYCC canvasser would knock on 80 to 100 doors in high density low-income turf and have brief five to six minute conversations on a specific campaign. The rap was revised so that canvassers were having longer, deeper conversations on the doors (12 to 15 minutes) that discussed not just a specific campaign but also the organization as a whole. The canvassers also asked contacts more questions about their specific community concerns.

The NYCC canvass operation ran for a total of approximately seven months, during which it achieved the following:

|  |           |
|--|-----------|
| Canvass Shifts Completed                       | 700       |
| Doors Knocked                                  | 42,770    |
| Contacts made                                  | 12,831    |
| Contacts engaged/educated on major campaigns   | 6,260     |
| Total full members (\$10/month sustainers)     | 910       |
| Total associate members (one-time dues <\$120) | 1,838     |
| Total membership dues collected                | \$ 87,253 |

The NYCC canvass was fully sustainable. The only additional costs were management and administrative costs (payroll, transportation). The goal is to eventually cover these costs as well.

|                                   |           |
|-----------------------------------|-----------|
| Cost of all canvass shifts        | \$ 84,000 |
| Cost of management/administration | \$55,000  |
| Total operational costs           | \$144,000 |
| Net Cost                          | \$56,747  |

In addition to a successful seven months of engagement and membership recruitment, the canvass also proved to be a successful tool to integrate with NYCC's organizing department and grow its active membership. The canvass was used to turn out new members to several events and neighborhood meetings. A total of 273 new active members joined through the canvass.

NYCC feels encouraged by the preliminary numbers of the reorganized canvass operation and plans to further develop and expand the program moving forward.

## Action United

Action United focused its sustainability efforts on developing a street canvass operation to build a sustainable small-donor base. The organization defined its goals as:

- Increasing the number of sustaining members of ACTION United.
- Reaching a total of \$5,000 in automated monthly income from sustaining members.
- Utilizing a street, door and phone canvass team to increase visibility and awareness of Action United's key issues.
- Building and developing a team of highly skilled and professional canvassers.

To accomplish its goals, Action United invested in its last goal first. It hired a canvass director with several years of street canvass experience. The canvass director trained two canvassers to build the program. After several months, the canvass director left the organization, and one of the canvassers trained on the program was able to fill the director position and continue to grow the street operation. The canvass team comprised six to 10 canvassers a day, and each canvasser worked between three and five days a week. Action United's canvass director, assistant directors, and field managers also ran daily canvass trainings. In the course of its canvass experiment, Action United exceeded its goals:

|  |           |
|--|-----------|
| Contacts made                              | 20,000    |
| Contacts who have made one-time donations  | 3,500     |
| Total full members (\$10/month sustainers) | 500       |
| Monthly income from canvass contacts       | \$ 6,700  |
| Total contributions collected by canvasses | \$168,877 |

## Lessons From Unsuccessful Canvass Experiments

Three of our canvass experiments were not successful and folded within three months. While the results were disappointing, they also provide valuable lessons regarding what steps are absolutely necessary to start new canvass operations.

One common factor of all three unsuccessful experiments was that the field director did not have extensive membership or fundraising canvass experience. In two of the experiments, the canvass projects were managed by community organizers who had some experience in canvassing for membership dues or donations, but no experience in training canvassers on how to raise money and sign up members, or in implementing the operations necessary to run a successful canvass (such as database and dues processing systems, statistical tracking and analysis, etc). In the other, the experiment was implemented by an organizer with extensive experience in running get-out-the-vote and civic engagement field operations, but no experience in membership or fundraising canvassing.

In all three cases, we attempted to provide training and consultation to the field directors—all spent between two and five weeks working with the New York Communities for Change canvass team. However, it became clear that far more training time was necessary to develop the necessary fundraising and membership recruitment skills, as well as the systems required to operate a successful canvass.

This suggests that one of the most basic requirements for an organization to develop a successful membership or donor canvass is a field director with at least two years of experience canvassing for membership or donations, as well as experience in managing canvass teams and supervising field operations.

These three organizations also struggled to integrate dues-collection systems into their existing infrastructure. One had a very robust database that took weeks to customize to make sure that the canvass efforts were accurately tracked and connected to the right contacts. The other two had very rudimentary databases and no system for collecting recurring dues.

Although its canvass-based sustainer program was not successful in this round, one of these three organizations had tremendous success integrating dues-paying membership recruitment into its ongoing organizing work. In 2014, this organization recruited more than 1,700 dues-paying members and changed its membership dues from a lifetime value of \$125 to a sustainer model of \$125 plus yearly dues of \$24. In late 2014, the organization began to enlist current members as sustainers in all of its organizing committees, and membership dues income surpassed \$80,000. At the closing of the year, the organization launched an aggressive membership recruitment program attached to its efforts to support more than 10,000 immigrant New Yorkers who stand to benefit from President Obama's immigration executive action. In the month of December alone, over 250 new dues-paying members joined the organization as part of this effort.

The experience of this organization exemplifies the need to carefully ensure that canvass-based membership and donor programs can be fully integrated into the organization's culture, methodology and systems. As CPD continues to evolve its Sustainability Initiative, the lessons from this round of experiments will inform our efforts and advance the field's ability to use canvasses to build the power and scale of movement organizations.

## The Value of Successful Canvasses Over Time

One of the key challenges of building a sustainable dues-collection and small donor program is that it takes time—at least a year, often more—for organizations to break even, and even longer to recover the original investment and start accruing new dollars. The most successful programs account for this challenge and plan ahead, taking the long view.



As part of this initiative, CPD helped organizations project their programs over three and five years. These preliminary projections show that increased investment in data systems, implementation of follow up programs (phone, digital and mail operations), and ongoing training of lead canvass staff, enables organizations to expand their canvass operations, increase the sustainability of these programs, and adapt their canvass models to advance other organizational goals.

### Conclusion


The Sustainability Initiative was a successful experiment for CPD/CPDA and our partner organizations. Through our interviews with experienced practitioners, as well as our partners' successes and challenges, we have refined a set of best practices that will hopefully be useful for other organizations looking to improve the effectiveness of their canvassing or to start up canvassing programs from scratch.

The most effective canvasses build organizational power by engaging community members to provide their insights, to participate in actions, and to contribute financially. In order to build an effective canvass, organizations need experienced, skilled field

directors; talented, engaged canvassing staff; high-quality, ongoing trainings that are integrated with the overall organizing program; effective data infrastructure; and a long-term strategy for achieving self-sufficiency.

Clearly, organizations need a lot of focused resources and infrastructure to effectively canvass. While this may seem daunting to take on, we hope our Sustainability Initiative inspires more organizations to think through how canvassing may be the right fit for their goals. ■

The Center for Popular Democracy (CPD) works to create equity, opportunity and a dynamic democracy in partnership with high-impact base-building organizations, organizing alliances, and progressive unions. CPD strengthens our collective capacity to envision and win an innovative pro-worker, pro-immigrant, racial and economic justice agenda. Learn more at [populardemocracy.org](http://populardemocracy.org).



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# Navigating Corporate Giving for Grassroots Organizations

By Armando Zumaya

**“NAVIGATING” IS THE RIGHT WORD** for entering the world of corporate giving: Imagine steering your philanthropic ship into a dark harbor as a storm comes up. There are shoals you can’t see; there is a light house and a safe harbor up ahead. Go too fast and you risk slamming into rocks; go too slow and you might miss an opportunity to dock in safety.

I am not sure how many of us own a yacht, but you get the idea. Corporate giving programs for grassroots organizations can be like docking that boat. Many powerful potential corporate partners can not only give dollars to your cause, but also visibility and legitimacy. What follows are my rules you should consider

when approaching a corporate donor, based on my 31 years in the field. My examples are real, but the names have been changed to protect the innocent.

## **Understand Your Partner**

Most companies give to nonprofits for very different reasons than foundations and individuals. They overwhelmingly want to give for public relations purposes. Philanthropy is good marketing and helps companies look good to their customers. As grassroots and progressive organizations, we often find this rationale repulsive, but why? These are for-profit companies after all, so of course their



philanthropy will be tied to their profits in some way. If you can make peace with this, it is possible to accept corporate support without compromising your mission and work. Still, it's important to always keep the public's perception in mind first, and take your eyes off the size of that oversized foam core check.

I have seen many development directors approach the community affairs or philanthropic arm of a company for giving. While that's a good place to start, it's important to also approach the marketing department. When thinking about which companies

## **ALWAYS KEEP THE PUBLIC'S PERCEPTION IN MIND FIRST, AND TAKE YOUR EYES OFF THE SIZE OF THAT OVERSIZED FOAM CORE CHECK.**

to approach, ask yourself about fit: What company serves your community? What company would benefit from being aligned with your organization's work? Of course, you should also ask yourself whether you want to be aligned with that company too. Think creatively about who your community is and who would want to appeal to it. For example, when I worked at an opera, luxury car companies vied to sponsor us because our audience was their clientele. When I worked on children's health, healthy food companies approached us to partner with them. Prospecting for a corporate partner can be a lot easier if you start with a good match.

### **Don't Sell Your Soul**

When I worked in children's health, a major soft drink company wanted to give us a massive gift and have a cause marketing campaign. We would be associated with sugary sodas, and our logo would be put on all their bottles. Our leadership rightly killed that deal. It takes courage and integrity to walk away from a gift that size. Too often, organizations don't walk away. They sell their integrity for a high price, but it's sold nonetheless. This will ultimately hurt your other fundraising efforts in the long run. It's difficult, for example, to see an individual major donor who was going to make a major gift but is thinking twice after finding out about your latest corporate sponsor. Also, you have to consider your community's reaction to you working with a soda company while talking about childhood diabetes. If a corporate sponsorship hurts your program work, it is ultimately bad for fundraising—and your mission.

To avoid these pitfalls, think about creating a corporate gift acceptance policy. If you're working on community health issues in poor neighborhoods, create a clear policy on what you will and will not accept. For example, you may not want to accept money from liquor, tobacco or junk food companies. Being clear about these boundaries shows integrity and creates a sense of trust with your staff, donors and prospects. To streamline the process, you can create a corporate giving committee made up of staff and board members that can approve or reject new funding opportunities depending on if they are in line with your giving policy.

### **Avoid Playing Twister**

If you grew up during the 1960s like me, you may remember that game, Twister, where you contorted your body to win. It's a fun game, but much less so when it comes to corporate philanthropic partnerships. How much can you contort your organization and its mission to win? Look realistically at what the deliverables are. Some companies only want to list your name on their website and get invites to your annual event. Others require a lot of reporting. And some want your staff to wear T-shirts with their company logo, have a video of your executive director speaking on their website, and require your staff attend their corporate events. How much is too much?

Don't agree to anything in writing until you check with your whole team. Always under-promise what your organization is going to deliver, or else you will risk the eternal ire of your program team. However, anticipate some level of obstructionism from your staff. For some staff, all profit-earning companies are evil, and they will do whatever they can to block any corporate gift. So you might need to do some education and have some forthright conversations with your staff about corporate giving prior to engaging in a partnership.

### **Assess the Risk of the Partnership**

Remember that alignment goes both ways. How will your organizations look next to that company? Do your research on their past donations, their politics, and any history of scandals. How risky is this?

I used to work at an institution where the prospect researchers developed a risk number for each corporate opportunity. The scores were based on past negative public relations issues in the last 10 years—for example, whether the executives had ever been in trouble with the law and/or whether they had any controversial spokespeople. They also polled the board quietly and privately for their perception of this company: Is the company's product causing harm in the community or is it contrary to the mission of your institution? Ask yourself these questions honestly. It may



be hard to predict crisis and controversy, but it's easy to identify past mistakes and problems.

In one situation, the high risk was ignored when a large seven-figure opportunity was dangled in front of our top executive. We started a corporate partnership just as one of their products was publicly recalled and their executive was hauled before Congress. For about a year, we had to keep explaining that snafu to every donor and prospect, and I am sure it lost us donors and tarnished our reputation. It's hard to quantify, but both those effects cost us revenue.

I have seen some organizations also ask for partnership agreements with back doors. Many companies will put escape clauses in their agreements. If your organization or its employees do some-

## **SMALLER COMPANIES MAY NOT HAVE A HISTORY OF PHILANTHROPY, BUT THEY OFTEN HAVE STRONG ROOTS IN THE COMMUNITY.**

thing awful and lands on the five o'clock news, the company can terminate your agreement. Make sure this type of clause goes both ways. Analyze partnership agreements for risk. Each company has different types of risks. Have a frank, open conversation with your leadership and board about it and come to a consensus.

### **See the Trees in the Forest**

A common mistake grassroots and progressive organizations make when looking for corporate donations is that they look only at mega corporations. What about smaller, regional companies? If you're doing community-based work, someone is making money in that community. People eat, drive cars, and buy clothes everywhere.

Several years ago, I was working on a school reform project to improve the schools in a small rural Central Valley town in California. This town was literally one of the poorest in the US. Our mission was noble and bold: to radically improve and reform the public school system. A new superintendent had called in my outside organization to create pivotal change. I needed to raise \$50,000 a year for something as vague as "public school reform" from this town of 24,000 people who were mostly living well below the poverty line. How?

Hanging around this town for a day, it became clear to me who was making money there. There were two huge international corporations operating in town, but they were notoriously cheap and not philanthropic. My inquiries to them were bounced up to corporate and went nowhere. So, who else was making money

here? The small food markets were all owned by one Chinese immigrant family that had owned them for 20 years. There wasn't a big chain supermarket. With the help of the 14-year-old son translating for me, I made a pitch to the head of the small grocery stores. He totally got it: The schools were awful, and without good schools, this town would always be poor. He told me, "I will step up and put my money in the pot." I asked him for \$5,000, and he wrote the check five minutes later. That's low-level corporate giving, but corporate giving nonetheless.

Using the momentum from this relatively small player, I then went to the banks, hardware stores, and cattle farmers, and asked them for help. If someone who ran a few small markets could put down \$5,000, of course these larger businesses would look bad if they didn't also give. I didn't have to say that to these businesses directly—it was obvious.

I ended up raising that \$50,000, and showed them the results of their dollars ever year, like a return on investment. Every year for three years they all renewed their giving. The big corporations in town eventually, through pressure from their employees, started giving too. Of course, there is also the intangible pride of having lifted their own community up. That school district is doing incredibly well now, and people are actually moving to that town for the schools!

Smaller companies may not have a history of philanthropy, but they often have strong roots in the community. Approach these companies, and you might be surprised at the results.

### **Play the Field**

Playing the field is a bad expression to hear when you're dating someone, but a good one when you're looking for corporate partnerships. If you have a sterling reputation, built over years, if people love your organization, that has great value. For a marketing VP at a company, bringing in a strong cause marketing partnership is good for their company and their career. Consider "exclusive" industry-based sponsorships—for example, your organization will only have a single banking, airline or supermarket sponsorship. You can sell that exclusivity to these companies to sweeten the deal. They are competitive even if they tell you they are not. Play them against each other. If your brand is flying high, if you are getting the love from their customers, then don't settle—negotiate hard. Do your research, and find out what that company is giving nationally to organizations like yours. Why be happy with a \$35,000 gift if they are giving \$100,000 in other cities?

### **Go for the Bank Shot**

Companies have lots of buckets, some of which you can't see. When you ask a company for money, it may come from their

foundation or it may come out of their marketing budget. You can hit many buckets in one ask. For example, if you run a domestic violence shelter and you approach a department store, first get the gift amount agreed upon, then start talking about in-kind and other types of giving. Remember this is a business, and they are used to aggressive asks. This isn't a foundation. Can they donate clothes and makeup for survivors of domestic violence? Can we do a week of special register add-on giving with visible signage for the shelter? Can we send out a slip of paper in the credit card bills for a month that highlights the shelter? Pitch them lots of ideas.

### Do Your Research

When approaching and looking for corporate partnership, prospect research is everything. Where and how you approach a company is everything. Is your first meeting with that local supermarket chain with their regional marketing VP or the CEO themselves? How do you know who would be more receptive? How can you get to the CEO? We can always cold call, but if you do your research, you can find the connections—through your board, current and former staff, major donors, friends, or colleagues. Who can get you in? Who can make a phone call and give you a warm referral?

### Conclusion

Those of you who know my work know I teach and consult around building other types of fundraising, especially individual major giving programs. In most places, corporate fundraising is still going to be less than five percent of total philanthropy. Some areas have more, and some have much less. It's an important way for our organizations to diversify of our funding. While it is wise to proceed with caution in pursuing corporate partnerships, our caution shouldn't keep us from exploring these opportunities.

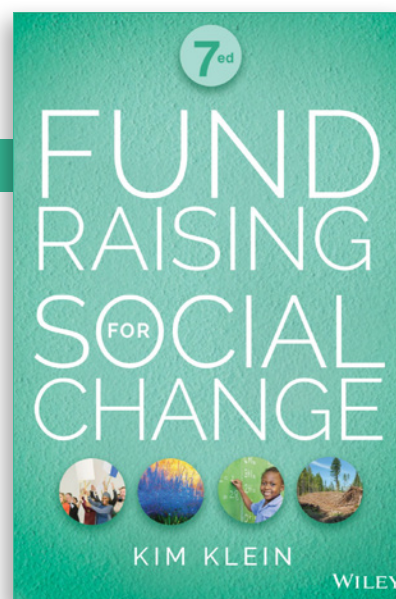
As grassroots organizations, we have to challenge the notion that all companies are bad and only part of the problem. These days, there are more and more socially active and responsible companies. Which ones are in your town? Who needs your donors as clients? It's an uphill battle to get your first corporate donor, but it gets easier as other businesses see who you keep company with. Keep at it, and learn as you go. ■

Armando Zumaya has been in fundraising for 31 years in a variety of roles that have given him a unique perspective on development offices, prospecting and the role of prospect research/management. Learn more at [armandozumaya.com](http://armandozumaya.com).

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Advocates for Youth 2015 Urban Retreat Attendees

# Corporate Funding More Straightforward Than You Think

By Jennifer Stark and Eleanor Allen

**SOME WOULD HAVE US BELIEVE** that there are two camps when it comes to corporate fundraising: the “I’ll take money from anyone” side, and the “hell no” side.

On the “hell no” side, many distrust the “hidden” interests of corporate money. But if you think about it, all types of funders (foundations, individual donors, and yes, corporations too), have interests and agendas. The key is identifying where those interests intersect with those of your organization. And, for nonprofits that like to think they aren’t engaging corporations at all, they may forget they have an employee retirement plan or organizational investment strategy that places them squarely in the middle of the corporate sphere.

Corporate giving is a philanthropic fact of life and a source of revenue for many nonprofits. The annual Giving In Numbers survey concludes that 56 percent of companies increased their

total giving from 2012 to 2014. Led by CECF and The Conference Board, the survey found that the business case for societal engagement is strong, with companies increasingly seeing community investment as essential to their operations. Just like foundation grantmaking, corporate giving officers and decision makers have philanthropic goals, opinions, and the ability to forge relationships and make useful connections. Corporate giving is actually more clear-cut than some forms of nonprofit fundraising because it is often tied to bottom line corporate goals and objectives.

You can find a happy medium of raising money from corporate funders and staying true to your organization’s values. We tend to forget that progressive people work in all sectors, including corporations. So, we challenge our friends at progressive organizations large and small to think more strategically about corporate funding for their work as a means of diversifying their revenue



and their universe of stakeholders. Having the corporate “wind at your back” can actually enhance your organization’s credibility in some spaces, open new doors, and provide a way to get input from someone other than the usual suspects who may always support everything you do 100 percent.

## YOU CAN FIND A HAPPY MEDIUM OF RAISING MONEY FROM CORPORATE FUNDERS AND STAYING TRUE TO YOUR ORGANIZATION’S VALUES.

Drawing upon our experience securing financial and in-kind corporate gifts for domestic and international nonprofits large and small, here are some questions to consider when getting started with corporate fundraising.

**Are there aspects of my organization’s work that align with a company’s interests?** Not every program you work on is a great fit for corporations. That is okay. You don’t have to like everything a corporation does, nor do they have to like everything about your work. But are there areas of common ground like education, youth leadership development, access to healthcare, or financial literacy? Lead with the area of common interest when approaching a corporation.

**Is your organization a good investment?** Just like in foundation grant seeking, you must share key accomplishments and stories that demonstrate your ability to achieve your mission, whether that is policy change, service delivery, or leadership development. Corporations are looking for a return on investment (ROI) in every aspect of their work. If your programs lend themselves to metrics where you can say for every dollar spent on X, we have Y impact—say it.

**Do you have a relationship with someone working with the corporation that can vouch for your organization’s work?** Just like foundations, corporations don’t want to be out on a limb. Being able to send signals that you deliver on your work and that the XYZ Foundation of Greater City has been supporting you for 10 years is important to mention. Of course, you should also mention if you have any recognized and respected board members from the community and/or beneficiaries that have gone on to do great things. This makes your organization credible to a corporate audience.

**Does your organization have any vendors?** Your organization’s vendors are businesses, and you already have a relationship with them. Start by asking them to sponsor an event, training or

conference you are doing, or ask them to give back on an annual basis at year-end. This is a great way to start small and get your feet wet in corporate fundraising—and collect some supporters who might be able to help you fundraise in the future.

**Can you offer some visibility for corporate support?** Simply put, corporations generally want good public relations from giving. I’m not talking a billboard or a commercial spot on television. Think about where you are a trusted voice and where you can recognize a company by including a logo or a sentence that thanks them for their support. It doesn’t need to be outlandish or over the top. Note the partnership or their contribution in a regular newsletter (print and/or online), a place on your organization’s website, social media platforms, signage at an event, or a shout-out from the podium.

**Can your organization authentically engage a corporation?** This is a tricky question and requires some emotional intelligence. But the payoff can potentially be significant funding for your organization. Are you willing to engage with the corporation on areas where you have a shared agenda as well as discuss areas where it is not so clear cut? Is there a way that input from each others’ perspectives will strengthen your respective work? This doesn’t mean you have to give away all your secrets or vice versa. And

## PARTNERSHIPS WHERE YOU CAN ENGAGE STAKEHOLDERS BEYOND THE USUAL SUSPECTS WILL STRENGTHEN YOUR WORK AND POTENTIALLY HELP YOU IDENTIFY FUTURE BOARD PROSPECTS.

it certainly does not mean you have to undermine your values. What it does mean is that you are willing to walk in their shoes long enough to understand how your work comes across to them, where you add value to their work, where they might add value to your work, and of course, where you can agree to disagree. Partnerships where you can engage stakeholders beyond the usual suspects will strengthen your work and potentially help you identify future board prospects. Grassroots organizations often go kicking and screaming into corporate fundraising only to make new friends in different arenas that lift their causes to a new level.

### Case Study: Advocates for Youth

As staff members at Advocates for Youth, we have seen firsthand how impactful the transition into corporate fundraising can be.



PHOTO BY LLOYD WOLF

Advocates for Youth 2015 Urban Retreat Attendees

As background, Advocates for Youth partners with youth leaders, adult allies, and youth-serving organizations to advocate for policies and champion programs that recognize young people's rights to honest sexual health information; accessible, confidential and affordable sexual health services; and the resources and opportunities necessary to create sexual health equity for all youth.

Just three and a half years ago, Advocates raised very little corporate funding. After two years of sustained effort (approximately a third of the time of one of two full-time fundraisers), we raised over \$700,000 in corporate support ranging from \$5,000 in event sponsorship, to six figure grants.

How did we do it? By being true to ourselves and to our mission. For example, in one corporate grant application we wrote: "Since its founding in 1980, Advocates has never wavered in its commitment to ensuring that adolescents' rights are not ignored nor sacrificed for political expediency and has long considered one of its core strengths the ability and willingness to speak truth to power, holding both its allies and opponents accountable."

At first we started small by trying to attract corporate sponsors from the \$500 to \$5,000 level to support our annual youth leadership development institute in Washington, DC. We created a sponsorship prospectus, solicited our vendors to get some early credibility, and asked our board to think about potential connections. Now having completed three years of soliciting support for this event, it has grown to about \$30,000 annually with about half coming from corporations (the rest comes from organizational partners and coalition members).

We identified a handful of issues on which we work where we thought there would be corporate interest: HIV/AIDS, international development, LGBTQ youth issues, and access to family planning services for young people. We were challenged to come up with a narrative to make it clear to someone that didn't know us well that we were a trusted messenger when it comes to reaching young people, health care providers, educators, and others that strive to meet the sexual health needs of young people—especially marginalized groups like youth of color and LGBTQ youth of

color. We had to create copy that succinctly stated what we do, how we do it, and who we reach (think scale and scope), as well as some key examples.

We made a list of corporations funding in this area ranging from pharmaceutical companies to insurance companies and beyond. We let everyone on our board and staff know what our intent was and to be on the lookout for requests for proposals and funding insights.

A committed team of fundraising and program staff wrote one of our most compelling proposals ever. From creating a striking proposal cover using photos taken by staff in the field to incorporating the voices of our youth activists themselves to create a riveting, ambitious narrative, we were awarded a \$250,000, 18-month grant from the Nike Foundation to elevate the voices of girls in the post-2015 United Nations development processes. We would have done this work regardless of whether we had dedicated funding for it, but certainly funding at this level made a significant difference.

We began to deliberately cultivate relationships with alumni of our programs who worked in the corporate world—people who already thought we did great work and may have funded us long ago. We also began to leverage social media to follow and track philanthropic staff at a few corporations. We tweeted one of these Corporate Social Responsibility (CSR) folks directly, which led to discussions about our work and, ultimately, funding.

Staff began going to conferences and events with an eye on what corporations were sponsors and supporters. This led to other introductions, conversations, and eventual invites to submit for funding for our work on the areas we suspected would align with corporate interests.

Ultimately, the corporate funding potential was always there for Advocates for Youth. It was just a matter of focusing on it deliberately, putting together the right narrative, and securing some early wins. Indeed, success breeds success—both internally and externally.

The fact that Advocates for Youth is both a national and international organization opens up many opportunities for corporate support given the reach and scope of the work. However, competition can be fierce. For organizations that are local or regional in scope, look at who is in your backyard, put yourself in their shoes, and take a chance crafting the copy that you think would get their attention. Try engaging a few corporations by giving them a call and asking for an exploratory meeting. Attend a conference they are sponsoring and try to make some connections. Follow and engage them on social media. Whatever strategies you employ, you may be surprised to find someone who is a personal ally of your organization and can generate corporate support in the form

of funding and/or connections that will ultimately push forward your mission. ■

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Jennifer Stark is a fundraiser and organizational management specialist whose mantra is “no money, no mission.” In her past four years at Advocates, she has diversified the organization’s revenue by adding a corporate philanthropy program, piloting a Youth Fundraising Advisory Board, deepening and expanding foundation prospecting and building a base of individual donors. Eleanor Allen has an extensive background as a strategic researcher and versatile writer for high-profile campaigns and national nonprofit organizations, along with a proven track record in foundation relations and grants management. She is responsible for contributing to the success of Advocates for Youth’s development program raising approximately \$6.5M annually through prospecting, research, proposal and report development and ongoing cultivation of foundation funders.

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