

Grassroots Fundraising Journal

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Contents

Volume 35 | Number 5 • September–October 2016

FEATURE



2 How Donors Decide: Lessons From a Year of Exploring Donor Attitudes on Long Island

After a year of working with mystery donors and focus groups on Long Island, Tamara Murray of Wonder: Strategies for Good and Amy Simon of Goodwin Simon Strategic Research, share valuable insights into what makes donors tick.



8 The POC Majority: Preparing Your Organization for Demographic Shifts

People of color are fast becoming the majority across the United States. Baby Boomers are reaching retirement age, and Millennials are increasing their ranks in the workforce. How can we continue to deepen our support from these communities? Stan Yogi shows us how.



14 Gift Planning: Your Guide to Transformational Gifts

Starting a planned giving program can seem like a daunting task. But Impact Communications tells us not to believe the hype. They debunk common myths about legacy giving and provide simple steps you can take to get your program off the ground.



On Our Cover

This issue's cover features fun photo booth pics from the Money for Our Movements reception. Thanks so much to everyone who joined us, especially our amazing host committee members for organizing such a fabulous celebration!

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Expressing Our Gratitude

AS YOU CAN SEE FROM THE PHOTOS on our front cover, we had a blast in Denver last month at the Money for Our Movements conference. In addition to seeing old friends and making new ones, it was wonderful to be part of a space where so much mutual sharing and learning was happening. For those of you who weren't able to join us this year, we sincerely hope you can make it to the next one! We encourage everyone to visit grassrootsfundraising.org/mfom to download workshop content and check out photos of the event (please check back soon for video footage).

We are grateful for the over 150 volunteers (including 110 presenters), 38 sponsors, exhibitors and advertisers, and nearly 300 individual donors who made Money for Our Movements possible. Thanks to the generosity of the GIFT community, we were able to offer over 70 workshop sessions, 80 Consulting Café slots, and three informative and engaging large group sessions, all with Spanish language and ASL interpretation services.

We'd like to give special shout outs to our visionary opening keynote speaker, Allen Kwabena Frimpong, who encouraged us to choose courage even in the face of fear; our fabulous debate team, who explored the politics of grassroots fundraising as well as equitable alternatives such as reparations from institutions; and our brilliant closing panelists, who validated fundraising as a revolutionary act, calling for bold shifts in resourcing our movements.

We open this issue with a piece by Tamara Murray and Amy Simon, who share lessons on what motivates donors to give and keep giving based on their year-long study of donor attitudes on Long Island. Next, we zoom out for a more macro look at changing demographics in the U.S., with Stan Yogi encouraging us to continue building support from communities of color. He provides us with tips to effectively engage both younger and aging generations. And because getting a planned giving program off the ground is imperative with Baby Boomers reaching retirement age, we offer a piece by Impact Communications that debunks the most common myths about legacy giving and suggests simple and easy ways for us to get started. We hope the tips and insights in the issue support your critical work of building resources for social justice.

As always, we are open to hearing your feedback on *Journal* articles, and welcome your suggestions of themes, topics and authors. This is *your* publication, and it's only as useful as it is relevant and helpful to your fundraising efforts. Get in touch anytime via email at jennifer@grassrootsfundraising.org.

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How Donors Decide

Lessons From a Year of Exploring Donor Attitudes on Long Island

By Tamara Murray and Amy Simon

PICTURE SUSAN: a woman sitting in front of her computer at home on Long Island, New York. Stirring her tea, she eagerly navigates to the homepage of a grassroots organization in her community that helps families with childcare and school advocacy to make a \$100 gift.

Her fingers tap at the keyboard, and she clicks “Donate.” Im-

mediately, she feels rewarded for having done a good deed—until she checks her email.

In her inbox, the message reads: “This is confirmation your credit card has been charged \$100.” Nothing about her generosity. Nothing about the difference her gift will make. Just a receipt, like she withdrew cash or stopped at a convenience store.

Now, another surprise: Susan isn't just any donor, she's a mystery donor. Like a secret shopper, she was recruited to make donations to grassroots organizations so we could see how organizations treated their donors. The findings were surprising.

What we learned from our mystery donor was part of a larger research project to help grassroots organizations on Long Island with their fundraising. We tested language and donation appeals in focus groups; we surveyed donors and learned more about their giving motivations.

While this project was focused on Long Island donors and grassroots organizations, there are some useful, broadly applicable takeaways that may help strengthen fundraising for your own organization. Before you frantically start reviewing your list for a name that looks like a mystery donor, read on for lessons that will take your fundraising communications from good to great.

“They Only Give to Groups in Manhattan”

When Horace Hagedorn, the founder of Miracle-Gro plant food, passed away at age 89, he left his estate for philanthropic purposes under the charge of his wife, Amy. Amy decided early on to spend down the assets he designated because the need for social justice today is great.

For years, the Hagedorn Foundation worked closely with small grassroots organizations to improve the lives of Long Islanders. As the spend down date drew near, the Foundation proactively asked its grantees how they could help with the transition.

“It's hard to find donors on Long Island—they only give to groups in Manhattan,” was the most common answer. Small, local organizations were having a hard time breaking through.

The Foundation partnered with our two consultancies, Goodwin Simon Strategic Research and Wonder: Strategies for Good, to learn more about Long Island donors and how Long Island grassroots organizations could better communicate with them. Another consultant was brought on to help with prospecting. What resulted was a one-year research project diving deep into the fundraising practices of Long Island grassroots organizations and the motivations of the donors they sought to engage.

Background on the Research Project

Our research findings are the result of interviews with donors and executive directors, secret shopper-style donations, audits of fundraising communications, donor focus groups, and a survey of Long Island donors. Together with our colleagues, we set out to answer the following three questions:

1. How can Long Island nonprofits communicate with donors effectively?
2. What are the profiles of typical Long Island donors?
3. What motivates Long Island donors to give to particular issues?

While we're highlighting what we consider to be broadly applicable lessons from this research, it is important to note that Long Island-based organizations and donors were the focus of this research.

LESSON 1

Poor Stewardship is a Deal-Breaker

What did our mystery donor's donations reveal? In many cases, grassroots organizations were not upholding their end of an unconscious, psychological contract: what donors unconsciously expect from the nonprofits to whom they give.

Half of the organizations never sent a formal thank-you for the gift, either by email or mail. The only response received was an email receipt that included basic transaction details, like the date of the gift, donation amount, organization name, and the last

THE DONOR DID NOT SENSE RECIPROCITY (A THANK-YOU IN RETURN FOR A GIFT) AND WAS COMMUNICATED WITH LIKE AN ATM, NOT A PERSON.

four digits of the donor's credit card. In one organization's case, not only was there no thank-you, but our mystery donor received five additional appeals within three months of her initial gift.

If our mystery donor was a real donor, it is unlikely they would give again. The donor did not sense reciprocity (a thank-you in return for a gift) and was communicated with like an ATM, not a person. They were not shown they were genuinely valued by the organization.

In one case, our mystery donor made an unsolicited \$500 gift to a small organization. The donor received one thank-you note and an additional appeal, but no other communication from the organization. A phone call would have been an opportunity to learn about a potential major donor and strengthen a new relationship. Experts at donor stewardship know that someone who gives an unsolicited gift of \$500 may very well be able to give \$5,000, \$10,000 or more.

Finally, our mystery donor encountered some embarrassing mishaps when making gifts online. On more than one occasion, the main link to the donation page was broken. Only after sleuthing around on other pages was she able to find a link that worked. Another organization had an event from 2013 as the featured item on their homepage. While every organization is allowed its mistakes, errors in an organization's basic operations, like online donation capabilities and regular website maintenance, send the message that the organization is disorganized and cannot be trusted to put donations to good use.

Our survey of Long Island donors reinforces the need for basic donor stewardship and engagement. The top three reasons Long Island donors said they had stopped making gifts to an organization were:

1. They received too many asks for money.
2. An organization was poorly run or seemed ineffective.
3. A lack of transparency about finances and where donations go.

These are all issues readily addressed by basic donor stewardship. It can be easy, in the quest to find new donors, to focus on inventive ways to get donors' attention, like the Ice Bucket Challenge. More often than not, however, there is a need to focus on the fundamentals. Are you thanking your current donors and sharing the impact of their gifts? Does a donor's experience with your organization create a sense of trust and professionalism, or does it create doubt and confusion?

The Unconscious, Psychological Contract

There's an unconscious, psychological contract between your organization and your donors. That's according to Dr. Phyllis Watts, our frequent collaborator and a psychologist who advises organizations on the behavior of their target audiences.

The contract is unconscious because donors give for what they see as selfless reasons. They don't consciously expect something in return when they make that first donation. But unconsciously, they have core expectations that need to be met:

- Feeling genuinely valued and respected;
- Sensing reciprocity in the relationship (giving and receiving);
- Trusting in the organization, including accountability, transparency and honesty; and
- Being seen as more than just an ATM.

The contract stays unconscious unless it is violated; then, it becomes very conscious.

LESSON 2

Shared Values Help You Connect

A challenge grassroots organizations can face is connecting with donors, not just logistically but also emotionally. If an organization's issue—like expanding local bus service, for example—doesn't impact a donor's daily life, what will motivate them to give?

We began looking for common threads and shared motivations for donors on Long Island. What spurred donors to support

A CHALLENGE GRASSROOTS ORGANIZATIONS CAN FACE IS CONNECTING WITH DONORS, NOT JUST LOGISTICALLY BUT ALSO EMOTIONALLY.

grassroots organizations in their community working on issues that don't affect them? Why did people who give to large, national organizations also give to small organizations two towns over?

The question providing the most insight may seem like the least likely one: Why do you live on Long Island?

If you aren't familiar with Long Island, it's a two-county island connected to New York City by bridge, highway and train. The mid-20th century saw its population and suburban development skyrocket. That growth has continued with subsequent waves of immigration—making Long Island increasingly racially and ethnically diverse. Our interviews, focus groups, and online survey, which were conducted among whites, Latinos and Latinas, African Americans and Asian/Pacific Islanders, revealed that Long Island donors share one thing: a love of where they live.

"It's a great place to raise a family, many said. It's suburban, with tight-knit towns and beautiful beaches—it's not the city," we heard over and over again.

"We're different from the rest of the state," a female donor said in a focus group. "When people ask me where I'm from, I don't say New York. I say Long Island."

We heard stories about the aftermath of Hurricane Sandy, when Long Islanders stepped up to help one another despite their differences.

This shared Long Island identity is important. There is a collective value donors share: a family-oriented way of life. They feel strongly that Long Island is a great place to live where neighbors help each other. It's not about just expanding local bus service, for example. One message that resonates with donors is keeping Long Island a great place to live and raise a family—by making it

possible for hardworking Long Islanders who rely on buses to get to work and support their families.

What Long Island donors value may not be the same as what donors in San Francisco, Minneapolis or New Orleans value. In your community, that shared value might be the belief that getting a good education shouldn't depend on where you grow up. Perhaps donors in your community would support your work because they believe in teaching their kids to value and respect all different kinds of people—regardless of their background or where they come from.

When you connect your organization's mission with a higher, shared value—no matter what it is or where you work—you will capture the attention of donors.

LESSON 3

Clear, Visual Language is Essential

"I have no idea what this organization does." That was the near universal reaction of donors to "About Us" descriptions of local, grassroots organizations that we shared with them in focus

MOST GRASSROOTS ORGANIZATIONS WERE MAKING A POOR FIRST IMPRESSION WITH POTENTIAL DONORS.

groups. That was after we gave the descriptions some minor editing to remove commonly used nonprofit jargon.

In other words, we found that most grassroots organizations were making a poor first impression with potential donors. Even organizations working on issues strongly aligned with Long Island values, like improving schools, drew skepticism because of opaque phrases like "increasing student success." This was especially true among male donors, who often wanted to understand the nuts and bolts of an organization's work before deciding whether to give. Without understanding, the connection with a donor was lost.

Clear, visual language was the solution. In other words, when we revised the "About Us" statements to paint a picture of an organization's work and results, donors responded positively.

One organization that "empowered women" received more support when they described that they "taught women their rights in the workplace." Same with another organization that provided "support for new immigrants" when they talked about providing "English classes and job skills training."

Think about what your work looks like in the world. If you

took photos, who would appear in them and what would they be doing? When you read your donor communications, look for places where you're using shortcuts like "increasing student suc-

THINK ABOUT WHAT YOUR WORK LOOKS LIKE IN THE WORLD. IF YOU TOOK PHOTOS, WHO WOULD APPEAR IN THEM AND WHAT WOULD THEY BE DOING?

cess," and say what you really mean, like tutoring and mentoring so kids graduate. If it's language you can see in your mind's eye, it passes the test and will likely connect with donors.

LESSON 4

Different Donors Gravitate to Different Types of Organizations

Sitting around a focus group table one evening were a group Long Islanders. All of them were there because they had made a donation to a nonprofit in the past year, and they were reviewing brochures about different organizations in their community.

Some were scoffing. *"I don't understand why you need an organization for this,"* they said. Keep in mind, these are people who make charitable contributions.

They were talking about the organizations working on systems change: providing leadership training, reforming laws, or encouraging political participation. The organizations that helped people find jobs or provided after-school services—the direct service organizations—made sense to them. Donating money to help others get registered to vote, for example, didn't.

That is because some donors in the room are what we call direct service donors. They are more likely to give to organizations providing concrete services that make a difference in the lives of people struggling around them.

Systems change donors, on the other hand, are more open to donating to policymaker education, grassroots advocacy, and similar efforts. Even within the exact same issue area, such as the environment, there are donors who gravitate to supporting beach clean-ups and those who gravitate toward clean ocean regulations.

We learned that systems change donors differ from the general population of donors. Systems change donors on Long Island have notable attributes. They are more likely to have a graduate degree or an annual household income of more than \$100,000. They also are more likely to belong to a union or describe themselves

UNDERSTANDING THE DIFFERENCE BETWEEN DIRECT SERVICE AND SYSTEMS CHANGE DONORS IS IMPORTANT.

as “very involved in their community” or “very liberal.” While this data is limited to Long Island, we have seen in other donor research that higher education levels often correlate with being more interested in systems change giving.

Understanding the difference between direct service and systems change donors is important. Think about your organization’s work and which category of donors it is more likely to appeal to when deciding how to target prospective donors.

LESSON 5

Successful Appeals Reach the Head and Heart

We are strong believers in the science of story—and you should be too. Stories enable us to walk in someone else’s shoes and feel empathy. Empathy is a requirement for altruistic behavior like making a donation.

The stories we tested in fundraising appeals highlighted a need or problem and explained how an organization’s solution, pos-

ONCE A STORY HAS ENDED AND A DONOR IS ASKED TO MAKE A DONATION, THEIR BRAIN GOES FROM EMPATHETIC TO LOGICAL.

sible only because of its donors, helped overcome that challenge. Consider the following micro-story:

“My boss made me work 12 hours a day without overtime and would humiliate me. I didn’t know my options. Because of your support, this organization helped me and other workers in the cleaning business start our own cooperative. Now we’re the owners and the employees, and we can take better care of ourselves and our families. My life has changed so much.”

Stories like these were effective because they allowed potential donors to walk in the shoes of someone who benefited from an organization’s work. This story in particular connected with Long Island donors’ desire to help hardworking people. The protagonist of the story was also especially powerful: She wasn’t positioned as a victim. Our research shows donors are more willing to help those who are do-ers and willing to also take action to help themselves.

But we also learned that many donors need to hear both stories

and the nuts and bolts of your work. Donors need to feel empathy first, then feel confident that your work is a good investment.

Once a story has ended and a donor is asked to make a donation, their brain goes from empathetic to logical. As they consider a dollar amount, they care more about numbers—especially about impact. Impact facts can demonstrate you are making a difference: the number of young people who go on to college after a program; policy changes your organization influenced; or the number of people who found jobs. Notice these examples focus on outcomes and results, not just the activities an organization undertakes.

Review your fundraising appeals to check whether they address both the head and heart. Whether it is a short email or a one-page letter, it is essential to cover both bases.

Our Research-Tested Recipe for Appeals

1. *Choose a trusted messenger.* Donors feel trust when non-staff messengers, like other donors or program beneficiaries, author the appeal. They can serve as independent validators of the organization’s impact.
2. *Start with a short story.* Choose a story with a relatable protagonist. For example, they can be relatable because they share your donors’ values, are hardworking, or are also parents.
3. *Show concrete change.* Use language that paints a picture in a donor’s mind of the change you seek to create. For example, “With the support of our generous donors, we’re making sure every child receives a development screening, catching issues like autism early.”
4. *Demonstrate widespread impact.* Share a few compelling facts and numbers that prove to your donors that your success goes far beyond the story you just shared.
5. *Make the donor the hero.* Don’t brag about your organization’s accomplishments with the organization as the story’s hero. Rather, let donors know what you were able to accomplish only because of their support.
6. *Give them donation options.* Donors get prickly when appeals ask for a single fixed dollar amount. When asked to make a \$100 gift, they sometimes bristle, “Well, I guess they are not interested in my \$25.” Always offer a range of donation amounts, and add a version of, “or whatever you can give.”

7. *End with aspirational values.* What is the better world you're working to create? By ending with an aspirational value, you are tapping the altruistic part of donors' brains at the very moment when they are considering whether to give—and how much! For example, this value tested well with Long Island donors: "Your generosity will keep Long Island a place where all kids have a chance to get ahead."

Putting This Research to Work

Our hope is that the insights from this research empower you to better understand your prospective donors and experiment with the specific lessons we've shared about structuring appeals and using more powerful language to connect with donors.

You can start by conducting your own internal fundraising audit to learn your organization's strengths and areas to improve. You may not uncover as much as an independent researcher would, but you'll gain valuable insights into your donor experience. With that information, you can begin course-correcting your stewardship practices and communications as needed.

Ask yourself: Does our donation page communicate the value of our work, or does it feel like an order form? Do our donor materials present our work in clear, visually evocative language that a neighbor or family member would understand? How quickly do we thank our donors, and how often do they get updates from the organization versus appeals? Are we sharing both stories and impact facts in our appeals?

Then, look into donor research specifically tailored for your issue and organization. In-depth donor research is an investment that pays a lot of dividends—better donor engagement, larger gifts, and less donor churn. It can provide you with informative donor profiles, such as the demographics of systems change donors in your area, and stronger messaging about your work.

If your organization can't afford to invest in research on its own, get creative. Talk to your coalition partners and explore whether you can pool resources. Or, talk to one or more funders about donor and message research for a cohort of grantees like you.

For example, we conducted donor research on behalf of a broad coalition of LGBT direct service and advocacy organizations. All participating organizations had access to the research findings, and it benefitted the movement as a whole, rather than just a few organizations. This model for funding research works well and can put sophisticated insights into your hands more affordably.

Above all, we want you to remember the real Susans out there—the ones who aren't mystery donors and want to support

important work like yours. The ones who feel that spark of satisfaction when they make a generous gift. Do everything you can to nurture that spark, and they will stick with you for the long haul. ■

Tamara Murray is a senior communications strategist with Wonder: Strategies for Good. Amy Simon is a public opinion researcher and partner at Goodwin Simon Strategic Research.

AUTHOR'S NOTE: Amy Hagedorn passed away in September of 2016. Her vision, philanthropy and hands-on leadership made this research possible—and improved the lives of countless Long Islanders.

Check Out More Articles on Donor Motivations and Communications in the *Journal* Archive!

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"Understanding Donor Motivations (Including Your Own!): A Training Exercise" by Uma Rao (Mar-Apr 2013, v32 n3)

"Strategic Communications for Year-Round Donor Engagement" by Joleen Ong (Sep-Oct 2014, v33 n5)

"Building Good Relationships with Donors Starts with You" by Kim Klein & Jean McCord (Mar-Apr 2007, v26 n2)

"Mom Was Right... Write That Thank-You Note!" by Nancy Otto (Jan-Feb 2007, v26, n1)

"More Money in the Mailbox: 11 Tips for Improving Your Mailings" by Andy Robinson (Nov-Dec 2005, v24 n6)

"What Have You Done for Me Lately? Building Healthy Relationships with eNewsletters" by Nzinga Koné-Miller (Mar-Apr 2012, v31 n2)

"Fundraising Appeal Makeover" by Nicole Hsiang (Jan-Feb 2010, v29, n1)

"Four Essential Tips to Motivate Individual Donors" by Mara Perez (Sep-Oct 2011, v30 n5)



The POC Majority

Preparing Your Organization for Demographic Shifts

By Stan Yogi

HAVE YOU EVER BEEN FOCUSED on managing an event, running a major gifts campaign, writing multiple grant proposals and reports, generating a year-end appeal—or busy juggling all of these responsibilities and more—to raise the funding you need for the current or next fiscal year? The vast majority of development directors, executive directors, and other fundraising staff members with whom I've worked as a consultant over the past five years fit this description.

If you, like them, engage in any fundraising planning, chances are you focus on the upcoming fiscal or calendar year. If you are in strategic planning mode, you might set three- to five-year income projections. But have you ever thought about planning to position your organization for fundraising success decades from now?

I invite you to consider, if only for the time it takes you to read this article, why it's important to think of ways that your organization can set itself up for greater long-term fundraising stability.

Unfortunately, the problems that social justice organizations address—racism, sexism, homophobia, transphobia, anti-immigrant policies, environmental degradation, and economic inequality—will not disappear soon. These problems may mutate in ways that will require nimble, strategic and smart organizations that are well-funded by a solid base of donors who can help both financially and politically.

What will your community of supporters look like in two decades?

We're living through a time of seismic demographic shifts that will continue for the next 30 years. Social justice organizations that ignore or resist these changes run the serious risk of not only

losing supporters (to natural attrition and death), but of not replacing those donors with new contributors, missing important opportunities to build movements for equity and justice.

This article lays out big picture data from the 2010 census and other sources that show how the U.S. population is quickly becoming much more diverse than it ever has been, which has serious implications for fundraising and organizing.

Of course, progressive, forward-thinking organizations manifest their values by creating and growing donor bases that reflect racial, gender, sexual orientation and age diversity. They recognize this is necessary to build vibrant, relevant and sustainable social movements that engage the people directly impacted by the organizations' missions.

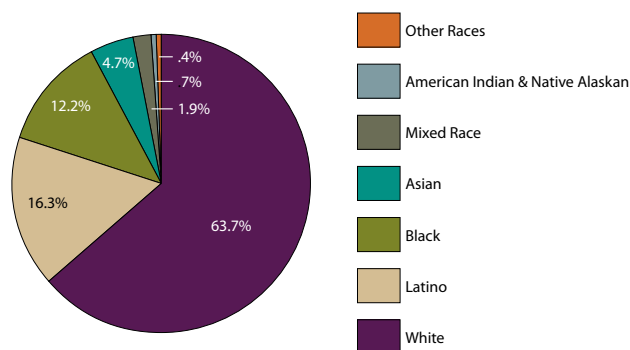
Many nonprofits focused on people of color, LGBTQ communities and women (and those working at the intersections of these groups) have long recognized the need to "support our own," and have generated funding and political power from within their communities.

If your organization is not already in this camp (and even if you are), I hope the data in this article will provoke you to think about what your group can do now to be ahead of the curve, rather than racing to catch up—not only for financial reasons, but for movement-building reasons.

Remember that 70 percent of adults in the U.S. contribute to nonprofits. If we want to maintain if not increase that percentage in the future, we'll need to do all we can now and in the years ahead to build donor bases that reflect the changing mosaic of the U.S. population.

People of Color Will Be the Majority

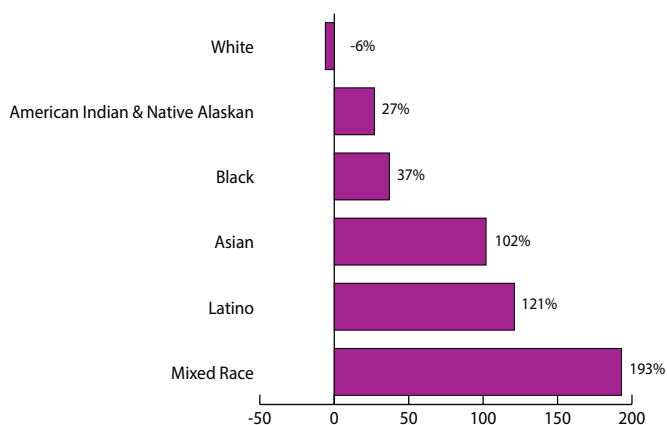
The 2010 census revealed the following racial/ethnic composition of the U.S. population:



Between 2000 and 2010, the white population grew by just 1.2 percent, while the population of people of color grew by 29 percent. During that same decade, the number of people who self-identify as multiracial rose by nearly 33 percent.¹

Now consider the projected growth of different racial/ethnic groups in the current and next three decades:

Projected U.S. Population Growth by Race: 2010-2050

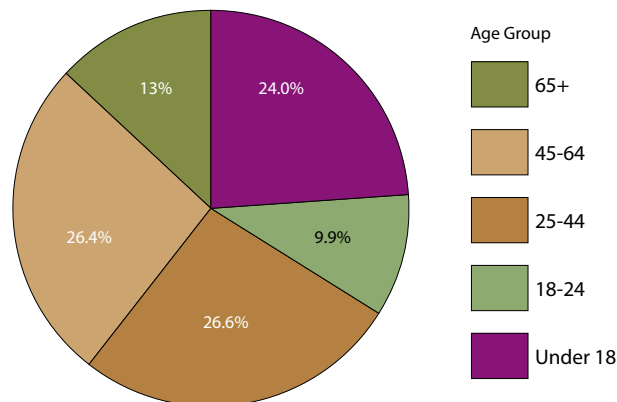


If these growth rates prove accurate, the more than 200-year period of the white population's majority in the U.S. will come to an end in the foreseeable future. No single racial group will be a majority by sometime after 2040.

¹ Frey, William H. *Diversity Explosion: How New Racial Demographic Are Remaking America*. Washington, D.C.: Brookings Institution Press, 2015. 58-59.

Looking at demographic data through the lenses of both race and age, we see some big contrasts.

The 2010 census showed that the U.S. population fell into the following age groups:



Baby Boomers and seniors (everyone born before 1965) made up 39 percent of U.S. residents, while Gen Xers (people born between 1965-1979), Millennials (those born between 1980-2000), and children constituted 61 percent. So in 2010, younger people already represented a significant majority of the population.

The Baby Boomer generation (people born between 1946-1964) and seniors (those born before 1946) are more than 70 percent white. Within those generations, African Americans are the largest “minority” group. Millennials, younger Gen Xers and their children (everyone born after 1975) are more than 40 percent people of color, with Latinxs being the largest “minority” population.²

The trend of younger generations being more racially diverse is only going to intensify. Between 2000 and 2010, the number of white children shrunk in 46 states and the nation as a whole. During the same period, the population of Latinx children grew in all 50 states; the number of Asian American children decreased in only two states, and mixed-race child populations grew in all states.³

2011 was the first year in which the majority of babies born in the U.S. were not white. Latinx births, at more than one quarter of all births that year, were the highest of any racial/ethnic group.⁴

² Frey, 32

³ Frey, 25

⁴ Frey, 21

Minority White ‘Tipping Points’ for Different Age Groups⁵

Age Group	Year when People of Color Become the Majority
Under 18	2018
18-29	2027
30-39	2033
40-49	2041

This table indicates that in about a year, whites will be less than 50 percent of U.S. residents under the age of 18. In each of the following “tipping-point” years, whites will be less than one-half of that age-group and those younger. The Census Bureau projects that Latinxs will make up about one-quarter of the population in each “tipping point” year.

Because the population of younger people is much more racially and ethnically diverse than older residents, the complexion of the United States will change significantly as the largely white Baby Boom and senior generations pass away and as more children of color and mixed-race people are born.

Who Will Be Working and Retiring (and Donating) in the Next 15 Years?

The composition of the labor force is of particular interest to nonprofit fundraisers. Since most people make contributions from their income, usually generated from a job, the size and characteristics of people in the age group demographers consider the labor force (18-64) are important to keep in mind. Of course, not everyone in this age cohort will be working, have a steady income, or donate to nonprofits. Nevertheless, it’s helpful to keep an eye on who constitutes this large age category.

Between 2010 and 2030, the number of 18- to 64-year-old whites is projected to decrease by 15 million. During that same period, the number of Latinxs in that age group should grow by 17 million. Asian Americans and African Americans in that age group are expected to increase by 4 million and by 3 million respectively.

Whites will still constitute a majority of 18- to 64-year-olds between 2010 and 2030, but their share is projected to decrease from 64 percent in 2010 to 54 percent in 2030. And looking further into the future, people of color will become a much larger share of the labor force because of their large youth populations: By 2030, 54 percent of Latinxs, Asian Americans and mixed-race individuals are projected to be under the age of 40.⁶ Consequently, the major-

ity of the labor-force-age population sometime after 2030 will be people of color.

Between 2010 and 2030, the senior population (65+) is projected to grow by 81 percent as the largely white Baby Boom generation continues to age.⁷ In 2015, Baby Boomers and seniors accounted for almost 70 percent of giving from individuals.⁸ Since we know that more than 70 percent of Baby Boomers and seniors are white, the majority of donors in 2015 were white.

Members of these older generations, if not already retired, will retire in the near future. While they will most likely continue to contribute to nonprofits, they may have lower incomes and not be able to give as generously as they did when they were working. If a large part of your donor base consists of Baby Boomers or seniors, you may experience during the coming decade a steady drop in both the number of donors in these generations (due to their deaths) as well as the amounts they’re contributing (because of lower income).

As younger people of color replace the Baby Boom and Senior generations in the labor force and in political and institutional leadership, significant questions for nonprofit fundraisers arise:

- Will the more diverse GenX and Millennial generations and their children take the baton from their elders and continue to give as widely and generously to nonprofit organizations?
- What are you doing now to encourage younger donors, especially young people of color, to invest in the social, environmental and economic changes that you’re working on?

Diversity Spreading Across the Country

I live in downtown Los Angeles, so I see the future of the country every time I walk down the street. Hard-hatted Central American construction workers and pony-tailed blonde matrons walk alongside Korean grandmothers and Mexican American teens wearing parochial school uniforms. Young Black mothers bouncing babies on their knees sit beside tattooed Armenian American hipsters at my neighborhood Starbucks.

Those of you who live and work in areas of the country where the demographic complexion is still largely white may be thinking, “Racial diversity may be the wave of the future, but it’s not going to affect where I am for a long time.” You might soon be surprised by the swiftness with which your community, region and state changes.

Rapidly growing racial and ethnic diversity is not just manifesting in more cosmopolitan cities and states—it’s spreading to almost every region of the country.

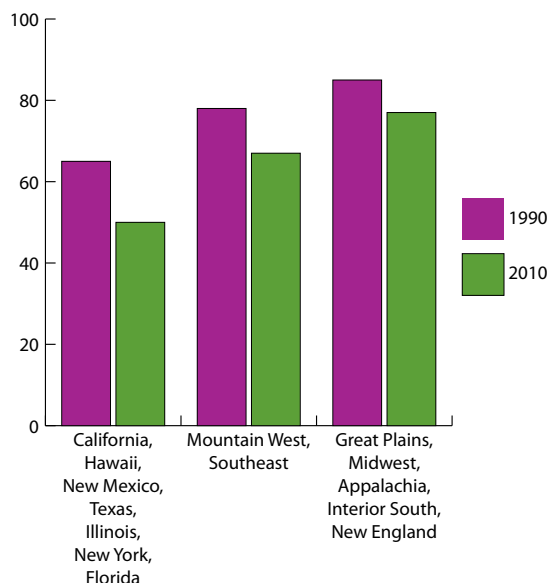
⁷ Frey, 34

⁸ *Giving USA 2016: The Annual Report on Philanthropy for the Year 2015 (2016)*. Chicago: Giving USA Foundation, 73.

⁵ Frey, 241, based on U.S. Census Bureau Population Projections

⁶ Frey, 240

Change in U.S. White Population by Region: 1990-2010



In the 1990s, the most racially diverse states (California, Hawaii, New Mexico, Texas, Illinois, New York, and Florida) were 65 percent white. By 2010, whites constituted 50 percent (or less) of people in those states. Similarly, in 1990, 78 percent of people in the Mountain West and Southeast were white; in 2010, that figure dropped to 67 percent. And in the Great Plains, Midwest, Appalachia, interior South and New England, 85 percent of the population was white in 1990, but in 2010, that figure dropped to 77 percent.⁹

Rapidly growing Latinx, Asian and multiracial populations are moving from the most diverse areas of the U.S. to almost all parts of the nation. Historically, Latinxs have concentrated in California, Texas, Arizona, New Mexico, Miami and New York City. Between 2000 and 2010, however, Latinxs settled throughout the country, with significant growth (at least 86 percent) throughout the South, Midwest and Mid-Atlantic states.

Keep in mind that “Latinx” is an umbrella term covering people of different national origins, with varied histories in the U.S. and uneven dispersal in the country. Two-thirds of Mexican Americans and Mexican immigrants (who constitute about two-thirds of Latinxs in the U.S.), for example, live in California, Texas, Arizona, New Mexico and Colorado.¹⁰ Puerto Ricans are largely concentrated in the New York City metro area. Rapidly growing

Salvadoran and Guatemalan populations are more evenly spread between the East and West Coasts.

Like Latinxs, Asian Americans are people of different national origins, immigration histories, and geographic distribution. Since the beginning of Asian immigration to the U.S. in the 19th century, most Asians have lived in metropolitan areas on the West Coast and in Hawai‘i. Nearly half of Asian Americans lived in West Coast states, Hawai‘i, New York, and Illinois between 2000 and 2010, but Asian populations rapidly grew (at least by 70 percent) in Southern, Midwestern and Northeastern states.¹¹ Growth of the South Asian American population is noteworthy in areas of the country where Asians historically have not lived in large numbers, like Atlanta, Georgia and Raleigh, North Carolina.

In 1900, 90 percent of African Americans lived in the South. But during the early 20th Century, Blacks moved in vast numbers to Northern and Western states as part of the “Great Migration.” By 1970, a little more than half of African Americans lived in Southern states. But during the last four decades, Blacks have been migrating to the South in significant numbers. Since the 1990s, Southern states have been gaining African American migrants from all other regions of the country, most significantly from New York, Illinois, Michigan and California, in part because of rising housing costs and displacement due to gentrification. In fact, the 2010 census revealed that for the first time, these states reflected absolute losses in African Americans.¹²

This movement to the South consists of mainly younger, college-educated and Baby Boomer-age African Americans. Black college graduates have settled mainly in Texas, Georgia, and North Carolina. And demographers project that a surge of African American retirees will settle in the South during the coming two decades. The beginning of that wave is already evident by increases of African Americans 55 and older in Georgia, Texas and North Carolina.¹³

Although large areas of the South are becoming much more multiracial, African Americans will remain the largest “minority” group due to the migration of Blacks to Southern states.¹⁴

The majority of people of color (67 percent of Latinxs, 79 percent of Asians, and 64 percent of African Americans) still reside in major metropolitan areas with more than one million residents.¹⁵ But that doesn’t mean that most people of color concentrate in inner cities. Suburbs, which historically have been largely white,

9 Frey, 50

10 Frey, 80

11 Frey, 99

12 Frey, 119

13 Frey, 122

14 Frey, 128

15 Frey, 142-43

are becoming much more polychromatic. More people of color in the nation's largest metropolitan areas now live in the suburbs than in the core city.¹⁶ In 2010, more African Americans lived in suburbs than in the inner cities of the biggest metropolitan areas.

Despite all of these dynamic changes, diversity is manifesting more slowly in some regions. In 2010, nearly half of the nation's rural and small metropolitan counties were still more than 90 percent white, even though many rural counties are losing white residents and gaining people of color.

Millennials Support Social Justice Issues

In recent years, a wealth of research has focused on the Millennial generation. The Millennial Impact Project, an ongoing multi-year research project centered on this generation's involvement with causes, for instance, has issued a series of reports on Millennials as donors and volunteers. The Project found that in 2010, 93 percent of Millennials contributed to nonprofits.¹⁷

Research on Millennials reveals both encouragement and challenges for social justice nonprofit fundraisers. On the positive side, Millennials have been the most liberal of any living generation, and the only one in which liberals are not significantly outnumbered by conservatives.¹⁸ In a 2014 survey, 31 percent of Millennials say their political views are liberal, 39 percent are moderate, and 26 percent are conservative.¹⁹

Millennial's political perspectives, however, vary significantly across racial and ethnic lines. Although the percentage of Millennials who identify as Independent is fairly consistent across race, nearly twice as many Millennials of color identify as Democrats than white Millennials. And the opposite is true on the Republican side. More than twice as many white Millennials identify as Republicans than do Millennials of color

Millennials are at the forefront of support for same-sex marriage and the legalization of marijuana, and they hold more progressive positions than older generations on immigration reform. And they are far more likely than older age cohorts to support an expanded role for government.²⁰

So the positive sign for progressive organizations is that, at

least in a broad sense, Millennials (and Millennials of color in particular) are likely to be sympathetic to if not in agreement with their social justice missions.

Another positive sign for nonprofit fundraising is that older Millennials (those born between 1980-1988) are the best-educated sub-generational group in U.S. history; one-third hold at least a four-year college degree. This is significant because now more than ever in U.S. history higher education is vital to economic stability and success.²¹ Millennials are projected to comprise 50 percent of the U.S. workforce by 2020. That percentage will only increase as Baby Boomers retire.²²

Education and volume in the labor force, however, do not necessarily translate into economic stability for Millennials. College graduates carry record levels of student debt: Two-thirds of recent graduates have outstanding loans, and the average amount they owe is \$27,000. Twenty years ago, only half of graduates had to repay loans, and their average debt was \$15,000.²³

Many Millennials entered the job market during the Great Recession (2007-2009) and are establishing their careers during the longest period of economic sluggishness in modern American history. During this same period, income and wealth gaps have widened dramatically. Millennials have lower levels of wealth and personal income than their two immediate predecessor generations (Gen Xers and Boomers) had at the same stage of their lives.²⁴

So, although Millennials may believe in the change that social justice organizations are trying to achieve, they may not yet be in a position to replace the generosity of the aging Baby Boom and senior generations.

What Now?

People of color becoming a majority and the rise of the Millennial generation do not translate into equitable distribution of wealth, income and resources. Social justice advocates know all too well the gargantuan income and wealth gaps in the U.S.

On average, about half of total annual giving by individuals comes from households with an annual income of more than \$200,000 or assets greater than \$1 million. In some years, this figure could be as much as two-thirds.²⁵ How many families of

16 Frey, 166

17 The Millennial Project's findings are based on surveys and focus group interviews with more than 75,000 Millennials. The Project, however, does not include any racial/ethnic overlay. So it is unclear if the Project's sample is representative of this most racially diverse generation in American history,

18 Younger generations are almost always more liberal, so time will tell whether Millennials will maintain this liberal bent.

19 *Millennials in Adulthood: Detached from Institutions*. Washington, D.C.: Pew Research Center, 2014. 22

20 Pew Center, 31-33

21 Pew Center, 9

22 2014 Millennial Impact Report. "Inspiring the Next Generation Workforce, 1

23 Pew Center, 9

24 Pew Center, 8

25 The Indiana University Lilly Family School of Philanthropy, as cited in *Giving USA 2016: The Annual Report on Philanthropy for the Year 2015 (2016)*. Chicago: Giving USA Foundation, 74.

color and Millennials are in that group?

A recent study concluded that if average Black family wealth continues to grow at the same pace it has over the past three decades, it would take Black families 228 years to amass the same amount of wealth white families have today. For the average Latinx family, it would take 84 years to generate the same amount of wealth white families have today.²⁶

More research and analysis are needed to examine the intersection of racial/ethnic demographic changes and income/wealth inequality.

As I indicated at the beginning of this article, my intention is to encourage thought about how demographic changes will impact your organization's fundraising efforts and what you can do now to plan for those changes.

Here are some questions to guide discussions with your colleagues:

Do we know the demographic profile of our donor base?

If you don't, now is a good time to try to get that information through donor surveys and other means. That information will provide a baseline to determine how your organization's donor base is representative, if at all, of the people impacted by the issues your organization addresses. (See "Using Surveys to Strengthen Donor Relationships" by Stephanie Roth in the *Journal* archive, May-June 2013, v32 n3.)

If we know the racial and age demographics of our donors, do they reflect the geographic region in which our organization operates or the communities impacted by our work?

Most of the nation is quickly becoming more racially diverse, with large metropolitan areas leading the way. Organizations in metro areas should be thinking sooner rather than later about diversifying their donor bases compared to those located in rural or smaller metropolitan areas. And organizations in the South should be building, if they haven't already, a base of African American donors.

How many of our donors are Millennials?

Millennials will soon be the majority of American workers. While Millennials may not yet be able to give significant annual gifts, over time they will be a dominant force in U.S. culture, if only by sheer force of numbers. Are you reaching members of this generation with compelling reasons why they should support your cause? See the Millennial Impact Project (themillennialimpact.com) for guidance on how to best reach and engage Millennial donors, such as providing specific stories and statistics on how their donations are creating change.

com) for guidance on how to best reach and engage Millennial donors, such as providing specific stories and statistics on how their donations are creating change.

Are we involving our donors in movement-building opportunities beyond donating?

Research shows that Millennials are not necessarily interested in supporting specific organizations as much as advancing a specific cause. They also consider volunteering an important way to contribute to a cause. Are you providing meaningful non-monetary opportunities for people to participate in your organization's work? Are those efforts clearly linked to advancing larger movements?

Are we digital?

Millennials are the first generation of digital natives. They're accustomed to accessing information through their phones and other portable devices. Is your website mobile-friendly? Is it easy for first-time visitors to quickly determine your organization's mission and program and why they're compelling? Is it simple for someone to make a donation on a cell phone?

Are we encouraging planned gifts?

The senior population will grow by 81 percent in the next 15 years. Now is the time to let donors know about the impact that planned gifts can have on your organization. Donors of all generations can remember your organization in their estate plans. Planned gifts are usually the biggest contributions individuals will make.

Moving Forward

For nonprofit fundraisers, the next two decades will involve building and deepening relationships with multiple generations, including younger and more racially diverse supporters. That work will be even more pressing for social justice fundraisers, since many of our organizations address issues of particular importance to the coming majority of people of color.

As people of color become more numerous, if not the majority, in increasing parts of the country, it is politically and financially vital that social justice organizations involve a diverse spectrum of supporters. Thoughtful planning today can ground your organization for success decades from now. Giving strategic thought now to how you can diversify your individual donor base can set up your organization to ride the swelling wave of diversity, rather than scrambling in its wake. ■

²⁶ *The Ever Growing Gap: Without Change African American and Latino Families Won't Match White Wealth for Centuries.* Washington, D.C.: Institute for Policy Studies & CFED, 2016. 5.

Stan Yogi is a senior consultant at Klein & Roth Consulting and former director of planned giving at the ACLU of Northern California.



Gift Planning

Your Guide to Transformational Gifts

By Impact Communications

Why Gift Planning?

Many organizations are talking about investing more in planned giving marketing. Yet, when your organization is addressing urgent needs right now, it can be hard to move your fundraising focus and budgets away from current dollars. This article will demonstrate why yesterday is not too soon to start marketing planned gifts and give you some easy, low-cost ways to get started today.

Why Now?

It is estimated that the World War II generation and Baby Boomers will transfer approximately \$59 trillion in assets by 2061. Trillion has a lot of zeros in it! Realizing even a tiny portion of that money could be transformational for your mission. So, if your organization does not have a robust planned giving marketing program in place already, time is of the essence.

Why has this become an even more urgent priority? Because the largest generation is aging quickly—10,000 Baby Boomers are turning 65 every day. They've been changing the world since the moment they entered it, and they will be changing the world long after they are gone.

Transformational Gifts

Baby Boomer donors are searching for ways to make their mark on the world. You can help them fulfill their desire to leave the world a little better than they found it, while securing transformational gifts for your organization.

Consider this: The average planned gift is \$55,000, and that number could be even larger at your organization. Even if some-

one gives you \$100 for 20 years, that giving still doesn't come close to a typical planned gift.

Begin building the path for your transformational gifts today with affordable and proven planned giving strategies.

Debunking Gift Planning Myths

Since the early 1990s, we have read articles, attended educational sessions, and heard our colleagues talk about planned giving in very complicated terms. Many myths, warnings and horror stories have discouraged organizations from getting in the game.

Myth 1

Gift planning is complicated, and you need specialized expertise. The truth is, gift planning programs do not need to be complex. You don't need a specialist on staff or an estate planning attorney on retainer. Most donors will have their own attorneys and financial advisors.

Myth 2

Gift planning communications are technical and require an estate planning expert to write. Wrong again. The vast majority of planned gifts are bequests—and all you have to do is ask a donor to leave a gift in his or her will. No formulas. No scary legal terms.

Myth 3

You need a big budget to market gift plans. Sure, the more you invest in marketing efforts, the bigger the return. But you can also get started tomorrow with next to no budget. Simply make

your donors aware that you want this type of gift. (See “10 Low or No-Cost Ways” section below).

Myth 4

Marketing planned gifts hurts annual fund efforts. Studies have shown time and time again that donors tend to increase their annual giving after making a planned gift. In fact, a recent study by Dr. Russell James showed that a donor’s average annual gift increased 75 percent after making a planned gift commitment.

Now that you’ve gotten rid of all of the reasons not to do it, let’s get started with how to do it.

10 Low or No-Cost Ways to Get Started Marketing Planned Gifts

1. Add a tagline to direct mail pieces, email signature blocks, business cards, letterhead, newsletters, webpages, and anything else your organization publishes.
2. Provide “sample gift language” that your donor can bring with them to their lawyer. Make this easily accessible on your website, in newsletters, and elsewhere.
3. Write an article for your newsletter on simple ways to leave a legacy, or write a profile story about a legacy donor.
4. Find existing gifts. Run ads in your newsletter, magazine and other publications asking donors to let you know if they have left a gift in their will.
5. Provide a check box on reply forms to allow people to request more information about leaving a gift.
6. Create an insert to enclose in your acknowledgment mailings promoting planned giving—postage is already paid!
7. Drive traffic to your planned giving website page(s) through online and offline ads.
8. Inspire more gifts by recognizing existing planned giving donors at your organization’s events and in your newsletter.
9. Train all development staff and major gift officers on how to open the planned giving conversation.
10. Make it a team sport. Host a meeting with annual, planned and major giving staff to brainstorm ways to grow the planned giving program. It will boost results in all areas.

Use the Right Language

- *Don’t talk about death.* Leaving a gift to a charity is about living, not death. It is a chance for your donor to live on by making a meaningful impact well beyond their lifetime.
- *Take away the acronyms.* Planned giving is bigger than the fancy legal terms that describe it. Ignore the CRUTs and CGAs and focus on what your donor wants to accomplish—making their mark on the world.

- *Avoid scary words.* Studies have shown that donors don’t know what a bequest is, and they don’t consider themselves wealthy enough to have an estate. Use simple words to avoid confusion.
- *Put your mission on center stage.* Generic brochures with your logo slapped on the front cover are ineffective. Donors leave gifts because they love your mission. So, take time to develop custom materials that allow your mission to shine through.
- *Sell benefits to the donor.* Tell your donors what’s in it for them:
 - It’s easy to leave a gift.
 - They can take care of family first.
 - They are never locked in.
 - They can make their gift in memory of someone or designate it to a particular program.
 - And most important they can be remembered for making a difference.

You CAN Do It

If you are not talking with your donors about leaving a gift, you are missing out on a huge opportunity to bring your donors closer to your mission. So don’t be intimidated by complicated gift types or legal jargon. Simply invite your donors to make a lasting mark on the world by leaving a gift to your organization. ■

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“Considering Legacy Giving” by Kim Klein (Jan-Feb 2007, v26 n1)

“Gift Acceptance Policies and Legacy Giving” by Fred Matthews (Mar-Apr 2007, v26, n2)

“Let’s Talk about Planned Giving” by Byron Johnson (Mar-Apr 2002, v21 n2)



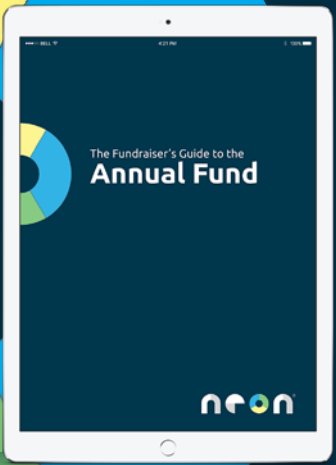
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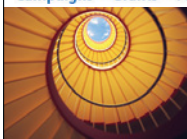
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