Grassroots Fundraising Journal

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A PUBLICATION OF
GIFT
Grassroots Institute for Fundraising Training

Contents

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FEATURE

Happy Birthday, *Grassroots Fundraising Journal*!

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"Things are not getting worse. They are getting uncovered. We must hold each other tight and continue to pull back the veil."

~Adrienne Maree Brown

IN THE DAYS SINCE THE ELECTION, my initial feelings of panic and despair have transformed into hope and determination. I am encouraged by the creative grassroots fundraising and networks of care that have already emerged, and am inspired by the legacies of resistance and resilience in our communities. We need each other now more than ever.

Here at GIFT, our commitment to building grassroots resources and power couldn't be stronger. Rest assured, we will continue to be your community resource as we move into 2017, giving you a platform to tell your stories, share your inspirations, and document the lessons you learn as you fundraise for social justice in the U.S. and beyond.

During the last 35 days of 2016, join us in celebrating the *Journal's* 35th birthday by helping us reach 150 new or returning subscribers, and raising $20,000 to keep subscription rates affordable.

As a loyal reader, you know you can count on the *Journal* for the tools you need to raise more money for the causes you care about. That's why we are asking you to share the joy of the *Journal* with others. When you see our emails pop into your inbox, please consider chipping in and sharing the message with your fundraiser friends encouraging them to subscribe. With your help, we'll keep providing affordable, relevant and practical tips, tools and resources for fundraising success.

Until then, please enjoy the articles in this issue. Heather Yandow shares fundraising trends of small and mighty nonprofits, and provides suggestions for deepening our donor relationships and improving our fundraising plans. Sheree Allison follows with a hard look at some of ways we undermine our fundraising efforts, and suggests pragmatic shifts that will increase mission impact. We close the issue with a helpful piece from Hadassah Damien, who breaks down different models of sliding scale and explains how to create one that is clear and equitable.

With appreciation and in solidarity,

Jennifer

P.S. Let's come together on Nov. 29 to celebrate #GivingTuesday and show our love for the *Grassroots Fundraising Journal*—visit grassrootsfundraising.org/GivingTuesday!

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Data, Donor Retention, and the Secret to Fundraising Success

By Heather Yandow

SEVERAL YEARS AGO, I was working with an executive director on her fundraising plans for the coming year. After talking through some of her ideas, she paused and asked, "So, do you think we can raise $50,000 from individual donors next year?"

We were on the phone, so she thankfully couldn't see my expression. I responded that I didn't know, and inquired about her past results. As we begin to talk about the organization's fundraising history, it was clear she didn't have the information needed to answer her question. And unfortunately, I didn't have any data to help her answer the question either.

At that time, there were no accurate, detailed fundraising data available for organizations with budgets less than $2 million. There were (and are) reports that looked at all giving, or even zeroed in on online fundraising only, but the data was largely inapplicable for small, grassroots organizations. An organization that raises $50,000 from 100 people cannot accurately compare itself with an organization that raises $5 million from 10,000 people.

As a math major with a history of fundraising and a love of data, I set out to solve the problem. In 2012, I conducted the first Individual Donor Benchmark study. This year marks our fifth year of the project, with 119 organizations from around the country taking part in an online survey. What follows are some of our most interesting findings. For the full report and printable infographic visit thirdspacestudio.com/idb2015/.

Focusing on nonprofits with revenues under $2 million, the *Individual Donor Benchmark Report* provides a number of data points that are consistent year after year, including:

- **Organizations raise 34 percent of their revenue from individuals.** This data point is almost the same as last year's result of 36 percent, indicating that this may be a universal truth about fundraising for small but mighty nonprofits. The percentage of revenue from individuals does vary depending on the organization's business model (the way funds are raised and spent). For example, animal welfare organizations—who often don't have access to foundation grants or government grants—raise almost three out of every four dollars from individuals (73 percent). (See page 11 of the full report for more details).

- **About half of individual donor revenue comes from donors giving less than $1,000.** These "everyday donors" give an average gift of $208. The average organization has 581 supporters in this category. The average organization also has 30 major donors (those giving $1,000 or more) giving an average gift of $3,961. (See page 14 of the full report for more details).
- **One out of every five individual donor dollars is raised online.** The percentage of online giving is up from 17 percent last year, and has been slowly increasing each year. The average online donor gives $219—significantly lower than the overall average gift of $533. As nonprofits move to conduct more fundraising online, the disparity between donation amounts could have a negative impact on overall revenue. (See page 31 of the full report for more details).
- **Four out of 10 board members are active in fundraising in a significant way, including attending donor meetings, making introductions, and hosting donor events.** This data point, too, has been consistent over the past few years, indicating that it may also be a universal truth. Although it is a goal for many development staffers to engage their entire boards in significant fundraising activities, these numbers reflect the reality that most organizations are falling short of that goal. (See page 44 of the full report for more details).
- **Organizations are raising about 14 percent of their income from recurring donations.** These regular monthly (or quarterly) donors tend to give more—an average gift of $754 annually, compared to the overall average of $533. The good news is that on average, one out of 10 donors are giving in this way. (See page 36 of the full report for more details).
- **Most organizations are using some kind of donor database, but their feelings about their database vary widely.** This year's database all-stars are DonorPerfect, Little Green Light, NeonCRM, and Salesforce, all of which were used by multiple participants, scored high marks, and made it relatively easy to retrieve data. (See page 47 of the full report for more details).

This year's report also dug into two critical focus areas for nonprofit fundraising: donor retention rates and fundraising planning.

Retaining Donors

One of the most important data points for individual donor fundraising is your retention rate: the percentage of last year's donors who give again this year. With that information, you can judge the success of your donor engagement work, project future fundraising growth, and create effective goals for new donor recruitment.

In this year's study, I found that **the donor retention rate is about 60 percent,** meaning you can expect that six out of 10 donors who gave last year will give again this year. And, possibly more important, four out of 10 donors who gave last year will not give again this year.

While many of the data points in the *Individual Donor Benchmark Report* changed with size of organization, number of donors, and presence of a membership program, donor retention stayed at 60 percent across all of these categories. The fact that the retention rate did not change as these other facets changed indicates that it may be a universal truth for small organizations.

IF YOU WANT TO INCREASE YOUR RETENTION RATE, THE BEST STRATEGY IS TO VIEW YOUR INDIVIDUAL DONOR FUNDRAISING PROGRAM AS A RELATIONSHIP BUILDING PROGRAM.

Here are two suggestions for how to find your organization's donor retention rate easily:

1. **Ask your database.** Many databases can calculate your retention rate for you through an automatic search. Relying on your database for this information depends on having good donor records, as you may get incorrect results if they are not well maintained.
2. **Calculate your retention rate by hand.** Your retention rate is essentially the number of returning donors divided by the number of donors you had last year. You should start by finding the number of returning donors you have this year. A good approximation can be found by subtracting the number of new donors from the number of total donors to give you the number of old (returning) donors. Most databases have some ability to find new donors, even if it means running a new query for new records who have given $1 or more in the current year. Once you have the number of returning donors, divide it by the number of donors last year. Now, you have your retention rate.

Approximate Retention Rate = (Number of Donors this Year – Number of New Donors)/ Number of Donors Last Year

If you want to increase your retention rate, the best strategy is to view your individual donor fundraising program as a relationship development program. Your goal should be to build a relationship with your donors, where part—and only part—of that relationship is about their financial support for the organization. Here are a few ways to shift your focus to your relationship:

1. **Consider your organization from a donor's perspective.** We often only think about what we are sending out to our donors, rather than what our donors are receiving. And since we are always busy, they must be hearing from us all the time, right? Wrong. Donors often think they are not hearing from organizations enough, even when you are sending them weekly emails, quarterly newsletters, or bi-annual appeal letters. Your donors are busy, and they are likely missing some of your communications.

   Even when we are communicating with and engage donors in many ways, sometimes we have holes in our plan. One way to find these holes is to walk through the experience that different types of donors have with your organization. What happens when a new donor makes a $25 gift? A $2,500 gift? What happens when someone gives online? What is the experience for a $50 a year donor? $500 a year donor? You may find that with a little intentionality you could be doing a much more effective job of engaging your donors with your work.
2. **Remember what you learned about your donor.** As a development director, I learned to listen carefully in major donor meetings and record what I learned after the meeting. I wrote down all of the important details, including philanthropic interests, family updates, or other personal details. Before my next interaction with that donor, I would review my notes and plan what kind of information I'd share and what questions I would ask.

   While this kind of attention is standard procedure for major donors, there is an opportunity to use some of the same ideas with everyday donors. As your donors click on links in your emails, respond to direct mail solicitations, or attend events, they are giving you information about what they are interested in. If you are diligent, you can capture that information and begin to develop a picture of your donors. Organizations can also survey donors to gather information about their interests and use that information to tailor solicitations.
3. **Thank donors seven times before you ask them again.** This advice has been around for a long time, but I still get surprised looks and big sighs when I share it: "Seven times?! How could we possibly do that?" First of all, it's a guideline—but the real point is that you should not treat donors like ATMs, only coming to them when you need money. You should be in touch year round to share the results of their donations (and your work) and to thank them for their support. These thank yous can look like: an official thank you letter on organizational letterhead, a hand-written note from the development director, a thank you phone call from a board member, a copy of a news article on your work with a hand written note, a quick note that accompanies your annual report, a detailed mid-year donor update, a Valentine's Day card, a holiday card, a birthday card, or an email update. The thank yous don't need to generate a lot of extra work—think about content that you are already producing that could be re-purposed as a donor thank you: annual reports, updates for the board, or grant reports.

Finding New Donors

Although there may be room to increase retention rates, many organizations will need to focus on finding new contacts and developing strategies to convert them to donors. Losing 40 percent of your donors year after year can be a huge strain on your donor base, even for a strong organization. Goals for finding new donors should be a part of every year's development plan.

One powerful framework for thinking about cultivating new donors is the cycle of engagement. The cycle includes the following components and questions:

1. **Opening the door to potential new donors.** How do you find new potential donors? How do you collect contact information from potential donors? What have been the best ways for you to find new donors in the past? What methods of meeting new people actually generate the greatest number of new donors?
2. **Thanking and tracking new contacts.** How are you communicating with donors after they first meet your organization? Do you have a welcome series to introduce your organization? What information about them are you tracking in your database or other places?
3. **Engaging supporters.** How can you help people experience your work? It may be by participating in programs, volunteering, or viewing a video about your efforts. How can you increase the opportunities for supporters to engage with your work?
4. **Thanking and tracking engaged supporters.** How are you communicating with supporters after their engagement with your work? What engagement data points are you tracking?
5. **Asking for a donation.** When we think about finding new donors, we often go directly to deciding how we ask them for financial support. Ideally, this step in the process would build on the work that you've already done to build a relationship with a potential donor. How can you tie your ask into the way you first met them and/or the way they have been engaged with your organization?
6. **Thanking and tracking donors.** How do you thank a donor? How can you thank them seven times? What information about their gift do you need to record in your database? After this step, go back to number three, and repeat indefinitely!

The best way to ensure that your organization is continuing to find new donors is to involve everyone—board, staff, and volunteers—in identifying, cultivating and asking for support. Even for those who have an aversion to fundraising (the topic of a whole

Busy Person's Guide to the Individual Donor Benchmark Report

2015

The Individual Donor Benchmark Report looks at fundraising results for small and mighty organizations - those with budgets under $2 million. Here are some of our findings:

Organizations retain about

60%

of their donors from year to year

4/10

board members are active in fundraising in any significant way

1 out of every 5 individual donor dollars is raised online

Organizations raise

34%

of their revenue from individuals

1/2

About half of individual donor revenue comes from donors giving less than $1,000

The best way to ensure fundraising success is to have a plan

Third Space STUDIO

Get in-depth fundraising data about small and mighty nonprofits, just like you. The goal of this report is to create a clear picture of realistic fundraising goals and results that organizations can share with their staff and Board. Get more data and tips on how to set your fundraising goals by downloading the full report at **thirdspacestudio.com/idb2015**

FOR EVERY ADDITIONAL BOARD MEMBER THAT PLAYS A SIGNIFICANT ROLE IN FUNDRAISING, ORGANIZATIONS WITH A FUNDRAISING PLAN RAISED AN ADDITIONAL $11,868 IN INDIVIDUAL DONOR REVENUE.

other article), getting involved in opening the door, engaging and thanking donors can be a fun way to help the organization grow its donor pool.

The Key to Success

The secret to fundraising success is not a secret at all. If you want to raise money from individuals, you need a fundraising plan. Again, this finding is replicated from last year's report, meaning that it is likely a universal truth about fundraising in small and mighty nonprofits. Organizations that have a fundraising plan reported raising one-third more money from individuals, nearly doubling their number of donors, and garnering significantly larger average gifts.

In addition, if you have a plan and you invest more time or money in fundraising, you will generate more revenue. This is true for paying your fundraiser more, hiring additional staff, or engaging your board members. In fact, for every additional board member that plays a significant role in fundraising, organizations raised an additional $11,686 in individual donor revenue.

What is most interesting about this finding to me is that how much the plan was actually used during the year had no impact. I asked fundraisers: How often do you use your fundraising plan? About half of respondents said that they checked in on it only a couple of times a year or less! That indicates that the act of planning is most important, not the plan itself. The investment you make in reflecting on past performance, articulating goals, and mapping out the year is what matters.

How to Create a Fundraising Plan

I was curious what organizations included in their fundraising plans, which is a term that can be ambiguous. In the *Individual Donor Benchmark Report*, I found that a majority of organizations include a list of overall fundraising strategies and goals, as well as a calendar of activities. About half of organizations include a more detailed breakdown of their activities, and half include an assessment of previous years fundraising results.

So if you want to create a fundraising plan, or improve the one you have, the report provides some guidance. But the exact format of your fundraising plan will depend on your personal and organizational habits and the plan's purpose.

For example, if you are coordinating fundraising activities with a large group of staff and board members, you may want to create a detailed plan with specific deadlines and named responsible parties. If your goal is to simply make sure you stay on track, a strong sense of overall goals and quarterly benchmarks may suffice.

Whatever format your plan takes, the three most critical pieces are:

1. **Your reflection on past successes and challenges.** Use questions like: How did you do last year? Where do you succeed? Why? Where did you stumble? Why? What does this tell you about what this year's work should be?
2. **Your stretch goals for the year, including those beyond just dollars raised.** You may want to include goals for new donors, donor visits, or your monthly giving program. Also consider including goals for board involvement and goals around strengthening your fundraising infrastructure (database, payment processing, thank you notes, etc.).
3. **A sketch of activities through the year.** Mapping out your goals on a calendar—whether by weeks, months, or even quarters—will help ground your plans and keep you on track when other activities begin to crowd your calendar. Be sure to include activities beyond fundraising like programmatic events, board meetings and vacations.

Putting the Data to Use

With this data, you can better understand, analyze and strengthen your organization's fundraising program. In particular, you can use this data to identify where your organization might focus energy and increase outcomes. Look for places that your organization's results are significantly different than the average, and try to understand why. For example, if your average gift is well below the overall average of $533, that may be due to doing a great job at attracting $25 donors—or due to a poor job of reaching out to high level donors. It may take more investigation to truly understand your results.

You may also find places where you are beating the average, and you should take a minute to celebrate your success. Also, consider why you've been successful and how you can translate that success into other parts of your work.

And most important, if you don't have a fundraising plan, create one today. Even a simple outline detailing your individual donor strategies and goals over the next few months will help you achieve better results.

For more donor fundraising details and data breakdowns, the full report and printable infographic are available at thirdspacestudio.com/idb2015/. ■

Heather Yandow brings 15 years of nonprofit experience as facilitator, trainer, coalition leader, project manager, and fundraiser to Third Space. She helps organizations with strategic planning, board development, business model design, implementing fundraising strategies, and going from good to great.

To Have Ultimate Mission Impact, There Is Only One Solution

By Sheree Allison

CHASING MONEY IS A WAY OF LIFE FOR FUNDRAISERS. More often than not, it's a treadmill of poor results produced from shoestring budgets. It's no surprise that the turnover rate of fundraisers in nonprofits is incredibly high.

On average, a fundraiser is out the door of an organization in less than two years. And the sector as a whole is completely unaware of the enormous cost every time that door closes. When a fundraiser leaves an organization, the campaign they were in the midst of raising money for grinds to a screeching halt. Donors and supporters call in only to discover that the person they trusted and built a relationship with is now gone with no explanation.

Suddenly there seem to be a bunch of surprises. Half done projects and loose ends not tied up. External suppliers left with no contact person. And the remaining staff rightfully fear for their job security because—like it or not—the reality is the mission has now taken a backseat to slashing overhead.

Organizations are not the only victims of a fundraiser's departure. The people who choose to do this work are some of the most caring, mission driven people on this planet. They don't take the job for the money. They take it to serve the mission. So imagine for a minute what their experience must be when their tenure is cut short, regardless of the reason.

The Catalysts of Fundraiser Frustration

To begin, boards are notorious for waving the "we can't afford that" flag even before fundraising starts. "Don't waste money on marketing, direct mail or admin support," they say.

Imagine going to work everyday knowing that raising money requires spending money, but your hands are tied. Boards and executive directors take pride in "doing it cheap." There is a badge of honor you bestow upon yourself when you get everything for free.

Marketing is a good example. Most organizations are unwilling to spend dollars in advertising and messaging to achieve their goals. Yet they proclaim the massive mission impact they want to have. Really?

Massive impact comes with massive effort, and it must be supported with the resources to execute. Hiding behind a concern for wasting money is an excuse to do nothing. And doing nothing ensures that year after year, you put a stronghold on creativity and bold thinking by convincing yourself that "fear of risk" is a worthy management practice for safeguarding your pennies.

If a fundraiser doesn't leave a situation like that of their own volition, they will predictably be asked to leave eventually. And they will simultaneously be vilified for the impact they didn't make.

Another common cause of early fundraiser exit is the "slow as molasses" decision making that goes on inside nonprofit organizations. The most common decision-making delay is the decision to conduct a formal planning session to confront the future. That delay trickles into board meetings, staff meetings, and straight onto the executive director's "good intentions" list that is never dealt with.

A year later, it comes up again as a vague idea everyone ignores once again. Consider the contradiction this creates in relationship to the fundraiser. The universal message from leadership demands money NOW.

Urgency is the order of the day, but nobody wants to work from a plan. The practices, systems and timeline operate at a snail's pace. The notoriously impatient executive director and board members have zero respect for the planning that goes into fundraising.

Invisible Silos

Fundraisers are constantly impacted by “invisible silos” inside nonprofit organizations.

A good example is Maggie, a fundraiser who experienced it directly. The first indication of separation was revealed her first day on the job.

Maggie’s office was near the fire exit, and her computer wasn’t connected to the office network because, as she was told, “It doesn’t reach this far down the hall.” Maggie’s disconnection was reinforced with no invites to meetings (“Staff meetings are just about our plans and programs, no need for you to attend, stick with raising money”). When she requested to attend a board meeting, the executive director warned her that the board “doesn’t like fundraising.”

Maggie took the advice and went in well-prepared, opening the conversation with her honest opinion as to where the organization was at with the annual fund. She asked the board members to join her in making personal asks to five of their colleagues and friends. Before she could introduce how this would be done, the board chair cut her off and reminded her, “We don’t fundraise. That’s why we hired you.” At that point, the executive director nodded to Maggie that she could leave the meeting.

Experiences like this are commonplace in nonprofits, leaving little to no mystery why fundraisers don’t stick around.

On top of that, poorly paid staff is standard in most nonprofits. For example, at a big annual fundraising conference this year, I checked in with a colleague who was attending and asked her where she was staying. She wasn’t sure. Her employer, a large health charity, paid the conference registration fee but told her she must stay with friends or family as there was no budget for accommodations.

Mind you, the conference was 938 miles away. In 2015, this charity raised $5.1 Million. She was central to that success.

Bring Your Own Laptop

Isn’t it interesting how success is honored? So often, nonprofits treat their key people like paupers. Where else would you seek to hire a

The Not So Obvious Reason Good Board Members Leave

If you are like most nonprofit organizations, you are continually seeking new blood for your board of directors. As the hunt begins, your filtering process is no doubt designed to bring in existing leaders in your community—people with a proven track record for excellence and producing results. You sit down with them and share your mission and the direction you are headed as an organization.

You invite them to contribute to something bigger than themselves—a cause they can champion and one that brings meaning to their own life as well as their community. You smile in mutual agreement, shake hands and look forward to a fruitful partnership. Then something strange happens. The “leaders” convene for a board meeting...and leadership suddenly disappears.

Why does this happen? How is it that you go above and beyond the call of duty to seek out the very best leaders to serve on your board...and you end up with chaos and dysfunction in the boardroom? The answer lies in your assumptions.

The assumption you make about leaders is that they will come on the board ready to deal, ready to execute, and ready to move the mission to more impact. And that doesn’t happen. The problem is that your expectation of why they said yes and their interest in your cause is vastly different. You expected them to arrive at the table and bring all their skills to solve your organization’s problems. They arrived at the table expecting to learn about the organization. In the middle of this collision is where the seeds of doubt are planted...and begin to grow.

No one joins a board expecting to feel incompetent. Unfortunately many board practices and behaviors lead to exactly that. Leaders experience feelings of not contributing, not being understood and ultimately not belonging on the board.

One of two things is bound to happen as a result. The most obvious one is that leaders leave the board, often silently or with some vague excuse like “I’m too busy.” The smallest percentage of leaders will stay, dig in, and seek to figure out exactly what their role is and what they are meant to do. But there is a floundering in this process—an embedded uncertainty that stirs leaders to question their role and their value on the board.

To be effective and to contribute, new board members need to be immersed in learning about the organization. It’s often said, “There’s a learning curve,” yet most organizations fail to provide guideposts to navigate that learning curve. How do you solve this problem? You commit to engaging the board as learners, not leaders.

Leader Orientation

Walk your new board members through a well-thought-out leader orientation. This experience captivates their interest, connects them to key people within your organization, and has them immediately feel the impact of the mission.

Your leader orientation should put aside the humdrum lists of roles, responsibilities, policies, bylaws and financials. Remember, you brought on a LEADER—someone who automatically defaults to the logical and the tactical. For this reason alone, you must take the time to plug their heart into the mission. If you don’t, your leader will default to operations because that is what they do in their daily lives. A well-constructed leader orientation interrupts that pattern.

First, expose a new board member to what your organization does. Let’s say you are a food bank. Walk them through how the food bank fits into the economic cycle and the role it has in meeting the basic needs of the community. Share how many individuals and families use the food bank in a given year. Talk about the next food drive to fill the shelves, and take a walk through the room where the food is stored, making sure to explain the process of how food is collected and distributed. Arrange for one or two key people to speak first hand to the work. Front line staff or volunteers are perfect to explain the process and answer any questions the new board member might have upon seeing the mission in action. This is just a snapshot of what sharing the mission with a new board member can look like in your organization.

Next, have the board chair conduct a conversation with the new member. Provide a binder or digital access to all the pertinent documents needed for decision making as a board member.

Before they attend their first board meeting, walk them through a recent agenda, and share what they can expect when they attend the next meeting. Talk through the key board member roles (i.e., board chair, secretary and treasurer) and how their role fits into the meeting agenda.

Mission Moments

Board members are not a part of the day-to-day life of the organization, so they must be immersed in the mission and the "why" of their commitment at every meeting. One of the most effective ways to create learning for the board is to include "mission moments." Mission moments put a face on what you do, and connect your Board to the impact of the work.

Mission moments stick with board members, especially new ones. Long after meetings have adjourned, the message of a person impacted by the mission will be mulled over, talked about, and put in their memory bank. Add one or more mission moments midway through your board meeting. Bring someone into the room who can tell a compelling story of what the organization means to them or how it has impacted their life. In doing this, you will discover that it creates a context for all the other "business" on the agenda.

Dream Saturday

Keep in mind, the heavy lifting of the board cannot all be done at regular meetings. You must set aside time for the board members to get together and dream. For this, I recommend implementing a "Dream Saturday" in September. The truth is that boards struggle with blinders. Monthly meetings demand governance, oversight and accountability. While all of this is necessary, it also robs the board of peripheral vision. They tend to lose sight of innovation and creativity. Commit to a Dream Saturday in September to ignite dreaming on key issues, new trends and bold ideas.

First, create a simple fact page that includes current data about the organization and what is happening in the external environment. Distribute the fact sheet to board members two weeks before Dream Saturday. Don't load them up with pre-reading. Just keep the fact sheet simple and short.

All board members and the executive director must be present on Dream Saturday in order to demonstrate their commitment to the master plan. Hire or appoint an internal facilitator—someone who will keep the day moving and stick to the agenda. An unplanned, free flowing day will end up with no results. The facilitator's job that day is to be the ringmaster. They should keep the momentum going, add a bit of fun, and, most of all, keep the group focused and on task.

Dream Saturday is not about pipe dreams. It's about ideas, inspiration and transformation. It has the ability to turn your organization into an innovative, cause-driven organization that changes your entire community. A great tool for Dream Saturday is the Mission Matrix. It's a way to reach a decision on the value of an idea and whether or not to move forward with it. Among other things, the Mission Matrix contains a series of nine questions, each ranked one to three:

1. How much mission impact could this create?
2. How long will it take to implement?
3. How time/work intensive is this idea?
4. How much cash investment will this require?
5. What is the likelihood of success?
6. Is this likely to compete with an established program?
7. How much non-mission expertise will we need to make it successful?
8. How much staff time will this require?
9. Does this fit with our vision and core values?

If the total score is 80 percent or higher, it's a "go forward" idea. Anything less than 80 percent should be eliminated. A matrix like this causes decision-making based on logic, reason, and the mission of the organization.

Annual Check-In

Finally, consider creating an intentional conversation with each Board member in the form of an annual check-in.

Think of at as an investment and a commitment to awareness. Once a year, meet with each board member alone, and talk about what they like about being on the board and what they would like to change. Find out what is happening in their life. You'll be surprised at what you learn. The details they share build a stronger bond between you, the board member, and the mission. Believe it or not, an annual check-in can be a turning point. It intersects what you think you know about a board member and what is actually true.

person to raise $500,000 or more per year, tell them the board is "not into fundraising," provide no money for training, and tell them to bring their own laptop to work? Somehow, low wages are equated with financial prudence as a benchmark of effectiveness.

Do you know how many boards wait until year end (usually December) to review the executive director's salary and base their decision on the bottom line at that time? The number is staggeringly high.

Boards are spearheading the decision to provide inadequate compensation while setting ambitious goals year after year. How often do you get more when you pay less?

And what other sector do you know of that makes money by not investing in their leadership? What needs to change?

To begin with, consider taking the actions that follow to keep the best people in fundraising and nonprofit management.

Pay Staff What They Are Worth

Ask yourself a simple question: What value is the staff producing? And what is that value worth? Most nonprofits talk about staff wages as a cost. It's time to change the conversation.

Take Margot for example. Margot works at a women's shelter, something she didn't plan on. She applied for a job at the shelter after talking with a friend who told her about an opening, and she saw it as a gap filler until she landed a job in her field as a paramedic.

Her first day at the shelter, Margot opened the door to meet three little girls who had been dropped off with their mom. No toys, no clothes, no home. Margot led with her heart. She played with them, read stories, drew pictures, and cooked dinner.

Margot created home for the mom and three girls. After a month's stay at the shelter, Margot made connections to bridge them to a new life on their own. A week later, Margot stopped by to see how they were doing. The girls talked excitedly about their new school and new friends they made.

That is impact...and that is what boards think of as overhead. Margot's salary is money well spent. What is the cost of Margot to be the creator and the connector when people fall through the cracks? Priceless. Keeping the Margots in the sector requires paying them a living wage.

Hire Enough

"Overworked and underpaid" could be a sector song.

Most nonprofits run an archaic staffing model because you buy into old school thinking that the budget must be on a shoestring.

The two important tasks that are most often ignored in the budget? Administrative and janitorial support. Most nonprofits believe everyone can answer the phone and empty the garbage. So you have the executive director answering phone calls about what time the delivery arrives and the program leader scurrying about emptying wastebaskets at the end of the day.

Allow me to share a story of how staffing could work in your organization.

Roxanne is the executive director of a family services agency. When Roxanne took the job, her position had been vacant for six months. The organization was small and struggling with few supports, and it was running an annual deficit. Two staff members besides Roxanne were holding the operations together.

In the first 100 days, Roxanne met with every board member as well as key supporters, partners and funders. She quickly grasped the issues within the organization and crafted a vision of what they could achieve.

She knew exactly where they stood at the moment—annual budget of $250K, three staff and marginal impact serving 120 families. Roxanne could stay the course as executive director and create an organization of comfort, or she could transform the organization into a valued service provider for families in distress.

Roxanne believed in the organization's mission, and calibrated the goals to match her ambition. Fundamental to the transformation was staffing. Roxanne started small. She created part-time positions and drew up some contract work schedules. Her goal was to get the work done while freeing up her time to raise money, build relationships, and coach the board.

Within six months, Roxanne had a part-time receptionist and part-time marketing staff. She also added contracts for janitorial, bookkeeping and casework.

She was taking risks, which she discussed with the board. She told them the organization had a choice—to bolster its internal operations and grow its services to families, or wind down its operations, pull out of the market, and let another organization fill the gap.

To coast along in comfort was not an option for Roxanne. The board endorsed her plan. Within two years, Roxanne tripled the numbers. The annual budget grew to $725K, with eight staff and 390 families engaged in life-altering programs.

This isn't about Roxanne. It's about getting the right people—including the right number of people—into the jobs that create mission impact.

Yes, it is about money. It is money well spent when dedicated staff leverages the means to give families hope and alternatives.

Decide what needs to be done, and get the people in the room to make it happen. Don't let "we only have a few staff" be your mantra and justification for "the overhead cry" and dismal results.

Provide the tools and resources necessary to do the job.

Seeking: A Magician

A job ad is posted seeking an executive director. A candidate walks into the interview to find that the job pays $34,000 a year, and she will share an office with two other people who turn over every six months as they are on grants. The organization has two computers, no network, and no database system. She is told there is no health plan coverage. Also, she is informed that the board "hates fundraising."

She was mistaken. They're not hiring an executive director. They're hiring a magician to pull a rabbit out of a hat. This candidate has an impressive resume and skills, but she declines the position. And everyone shakes their head as they talk about how hard it is to get good staff.

A nonprofit exists to have mission impact. You create impact by what you offer: more programs, more help, more support. You do more good by providing more offerings. More offerings require more money.

And for some reason, program offerings trump fundraising. Flip the order! When you choose to neglect fundraising, you are neglecting the mission.

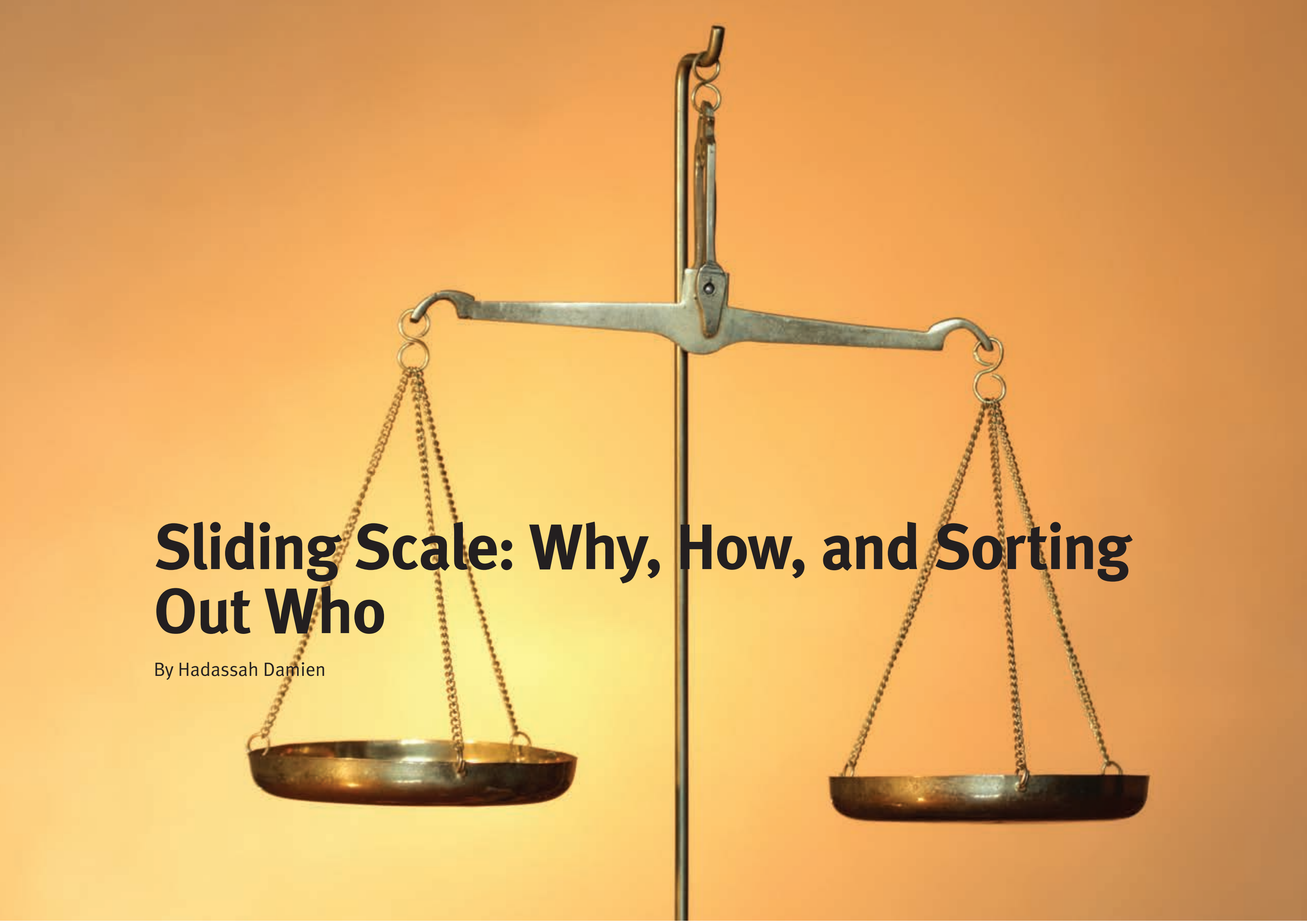
Flip the Order

How do you flip the order? Start by talking. Every conversation in the organization should honor fundraising. From the front door to the basement, from the receptionist to the board chair—everywhere and everyone needs to get up close and comfortable with fundraising.

It must be at the top of the agenda. It must be in every staff meeting. It must be on every website home page. It must be in the top three lists of major goals and the top three major accomplishments for the year.

It must be taught to staff. It must be expected of boards. And to every executive director —fundraising must be your first priority. You control the order of what is discussed at board meetings. You are in charge of what gets done. You are in charge of what has impact. You can flip the order. Mission impact demands money. Go get it. ■

For over 25 years Sheree Allison has been a committed professional, leader and visionary within the non-profit arena. She works with all types and sizes of non-profits. Learn more at ShereeAllison.com.



Sliding Scale: Why, How, and Sorting Out Who

By Hadassah Damien

SLIDING SCALE IS ONE WAY that people concerned with economic justice and accessibility navigate the realities of charging money for events and services. The concept at its most basic: People pay as they are able to for services, events and items. Those with access to more resources pay more and thus provide the cushion for those with less access to pay less. This creates a sustainable economic underpinning for said services, events and items.

Of course, nothing about money is simple, and neither is sliding scale. What feels like "less" to me might feel like "more" to you, after all. After eight years of running events based on sliding scale, and the last year running finance classes and coaching this way, I'm sharing some pro-tips and examples of effective sliding scale models. I will also give you a few examples of sliding scale gone awry so you know what to look out for, whether you are charging or paying using sliding scale.

The Dream...and the Problem

In an ideal, utopian society, everyone's natural Marxism comes out, and each takes according to their need and gives according to their capacity. But, we live in colonialist capitalism, so it doesn't play out that way all the time.

The core challenge is that you often get people with more resource access paying less. How does this happen? What's going on? I don't think the problem is that (most) people are genuinely corrupt or greedy. I think the problem comes from differences in scale, scarcity experience, and comparison. Everyone's bar is set differently for "enough."

1. Scale: If I've never had $100 of extra money I don't already need for basic necessities, I'm going to treat the $20 in my wallet differently than if I usually take $200 out of the ATM whenever I need cash for leisure activities. But if I usually only have $20 and suddenly have an extra $200, I'm also going to relate to it differently than if it's the norm in my wallet.

2. Scarcity experience: The experience of having less than what you need and surviving informs resource sharing positively. Fear or worry—often borne out of empathy—of "not having enough" hits people of middle-class experience especially hard, as they may not have had an opportunity for financial resilience that low-income people do. In my classes, I spend a lot of time discussing how folks who have experienced actual scarcity have a different relationship to what seems like extra money to them than folks who have experienced only the fear of scarcity.

3. Comparison: If I'm used to being around underemployed artists and I have a $40,000 a year salary, I may feel loaded. If I'm used to being around lawyers who make $150,000 a year, on a $40,000 salary I might see myself as not having much to spare. Put another way, if someone is used to living on, say, $2,000 a month and that's a reflected norm, they may feel willing and able to pay in the middle of a scale. But someone who just experienced a wage drop or who watches friends or parents making $80,000 a year compared to their $40,000 might feel like they're on the "less" end and pay less while making, say, $2,800 a month.

Pro Tip 1

If you're offering a service or an event and have a baseline amount in mind that is your sustainability cost, make that amount the middle of your scale.

Example: You want to average $10 per ticket for an event. Your sliding scale would be $5 to $15.

Real-life story: This pro-tip is brought to you by my years touring the US doing art that centered poor and working class LGBTQ people as artists and audience. We wanted our shows to be extremely economically accessible AND needed to make sure the touring artists could eat every day. Show after show, our person working the door took detailed notes and let us know that we always took in, on average, the middle of the scale. Why? Most people see themselves in the middle. When we realized we weren't breaking even on tour, all we did to make more money was raise the high end of the scale: $5 to 20. Now instead of averaging $10, we averaged $15 tickets. It made a difference.

Pro Tip 2

Trying to explain at an event that you're using sliding-scale? Spelled-out acronyms are part of accessibility. Not everyone knows what MIYHLIYD or PWYC or NOTAFLOF mean. Spell it out and level up your inclusion:

- MIYHLIYD – More if you have, less if you don't
- PWYC – Pay what you can
- NOTAFLOF – No one turned away for lack of funds

Sliding Scale Examples

Below are six useful examples of sliding scale, relational income, and class self-assessment tools created by organizations, as well as the model I've developed. They are categorized into three types—narrative, income levels and self-select—and include notes on how a particular methodology addresses one of the problems (scale, scarcity experience and comparison) I describe above.

NARRATIVE

Narrative helps address scarcity experience by pointing out which experiences tend to indicate low-income and/or low-privilege.

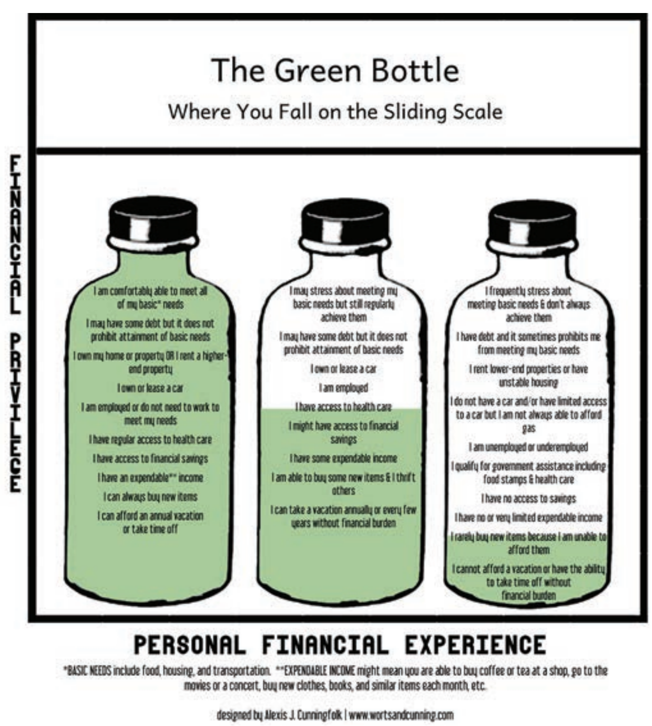
1. Speculative Literature Foundation description of who is "in" for a low-income scholarship:

What Do We Mean By Working-Class/Impoverished?

Here are some examples; they are not meant to be comprehensive, but rather to offer some guidelines to help you determine if you might be eligible. We mean to cast a wide net for this grant, so if you think you might be eligible, you probably are. If you have specific questions about your financial situation's applicability, please don't hesitate to write to us and ask. You would potentially be eligible for this grant if any of the following apply:

- *you're American, and qualify for the earned income credit,*
- *you've qualified for food stamps and/or Medicaid for a significant period of time,*
- *you live paycheck to paycheck,*
- *your parents did not go to college,*
- *you rely on payday loans,*
- *your children qualified for free school lunch,*
- *you're currently being raised in a single parent household,*
- *you're supporting yourself and paying your own way through college,*
- *you've lived at or below 200% of the poverty line for your state for at least one year,*
- *you've experienced stretches of time when food was not readily and easily available.* (Full description at bit.ly/2fbN8Td.)

2. Worts and Cunning Apothecary



Class and economic justice are topics that lots of folks struggle to talk about in the United States because most of us we aren't educated in schools and the culture at large to talk about money, access to resources, and what class actually is. Class, of course, cannot be understood as an isolated experience, but is part of the complex interactions of race, gender, ability, privilege, sexuality, and the myriad of identities we all hold. I think the sliding scale is a great way to begin a conversation about class because it frames the discussion from the standpoint of access.

Someone shared with me the idea of sacrifice versus hardship when examining access. If paying for a class, product, or service would be difficult, but not detrimental, it qualifies as a sacrifice. You might have to cut back on other spending in your life (such as going out to dinner, buying coffee, or a new outfit), but this will not have a long term harmful impact on your life. It is a sacred sacrifice in order to pursue something you are called to do. If, however, paying for a class, product, or service would lead to a harmful impact on your life, such as not being able to put food on the table, pay rent, or pay for your transportation to get to work, then you are dealing with hardship. Folks coming from a space of hardship typically qualify for the lower end of the sliding scale.

See the full description at wortsandcunning.com/blog/sliding-scale.

INCOME LEVELS

Seeing spelled-out income levels helps address scale and comparison. It also can help when you have specific costs to cover (for example: rent, medicine, salaries) to spell out the needed numbers as well.

3. Third Root Community Health Center

An explicit income-level scale functions effectively as a quick-check for people, and makes it very clear where you'd fall on the scale. However, it might miss some of the intricacies of someone's situation if, say, they make over $70K but are a first-generation college student with a lot of debt who also supports their parent(s).

Overall, a chart can support people who might otherwise be confused and is a good reminder to everyone about the range of incomes out there.

Note that Third Root's helpful breakdown in Figure 1 is based on NYC incomes that, like many expensive cities, are not aligned with the whole U.S. See more from Third Root at thirdroot.org/about-2/fees/.

INCOME-BASED SLIDING SCALE

RATE CHART FOR COMMUNITY ACUPUNCTURE, HERBAL CONSULTATIONS & WORKSHOPS

Net Annual Household Income	Community Acupuncture / Herbal Consult	Workshop 2 Hrs	Workshop 3 Hrs	Workshop 4 Hrs
$100K and above	$45	$45	$75	$100
$65,001 - $100K	$40	$40	$62	$80
$42,001 - $65,000	$36	$36	$54	$68
$33,001 - $42,000	$32	$32	$46	$60
$25,001 - $33,000	$28	$28	$40	$52
$15,001 - $25,000	$24	$24	$34	$46
$0 - $15,000	$20	$20	$30	$40

Effective September 21, 2015 Source: Thirdroot Community Health Center

Figure 1

4. Planned Parenthood

Sliding scales based on income levels are common in health care. Figure 2 below shows a current example from a Planned Parenthood clinic.

		SLIDING SCALE CATEGORIES							
		A	B		C		D		Full Free
		Gross Household MONTHLY Income							
		Up to	At least	Up to	At least	Up to	At least	Up to	More than
Household Size	1	931	932	1,397	1,398	1,862	1,863	2,328	2,329
	2	1,261	1,262	1,892	1,893	2,522	2,523	3,153	3,154
	3	1,591	1,592	2,387	2,388	3,182	3,183	3,978	3,939
	4	1,921	1,922	2,882	2,883	3,842	3,843	4,803	4,804
	5	2,251	2,252	3,377	3,378	4,502	4,503	5,628	5,629
	6	2,581	2,582	3,872	3,873	5,162	5,163	6,453	6,454
	7	2,911	2,912	4,367	4,368	5,822	5,823	7,278	7,279
	8	3,241	3,242	4,862	4,863	6,482	6,483	8,103	8,104
	9	3,571	3,572	5,357	5,358	7,142	7,143	8,928	8,929
	10	3,901	3,902	5,852	5,853	7,802	7,803	9,753	9,745

To figure out what fee you should pay on our sliding scale use the *Sliding Scale Income Worksheet* and retain it for your own purposes.

Here is an example of **estimated fees** for selected family planning services based on your sliding scale category:

Sliding Scale Category	A	B	C	D	FF
Annual Exam (including STD tests, Pap smear and pregnancy test)	$40	$123	$204	$287	$368
Sexually transmitted diseases testing (including Gonorrhea, Chlamydia and HIV)	$40	$88	$134	$182	$228
Pregnancy Test	$0	$11	$21	$32	$42

Figure 2

SELF-SELECT

Allowing people to self-select allows for autonomy and self-determination within a subject that is often fraught with emotions. This approach is essentially asking people to decide based on their gut.

5. Pronoia Coaching

The Sliding Scale Pricing Model. I am happy to announce that Pronoia Coaching is moving to a sliding scale pricing model. Coaching will now be $60-$140 per session depending on where the client feels they fall on the scale. No questions are asked. Also, I'm aware that $60 per session is still too high for some people; if this is the case for you, please contact me to start a discussion.

A Commitment to Accessibility and Social Justice. Why am I doing this? I know that coaching can be life-transforming work, and I feel strongly that it should be accessible to anyone who wants it. As a social justice advocate, I want to do what I can to bring more opportunity to all people. And, personally speaking, anything that broadens the scope of people that I get to know makes my life exponentially better!

My Experience with Sliding Scale Pricing Models. I am part of a spiritual tradition that uses a sliding scale model to price classes and intensives. Sometimes I pay at the top of the scale, usually I pay somewhere in the middle, and occasionally I've paid down at the bottom. When I pay more, I know that I am helping others to access the event. When I pay in the middle, I know I am helping the organizers cover costs. And when I pay at the bottom, I know I am letting my community hold me and support me. All of these are wonderful and acceptable ways of participating. I'm revealing my experience with the sliding scale because I want my potential clients to know that I've participated at all points and they should feel totally comfortable choosing what feels right for them.

Unfortunate Uses of Sliding Scale

Knowing where to place oneself on a sliding scale, and knowing how to ask the right questions up front is not easy. Here are two times that sliding scale did not benefit the intended people. Identifying what went wrong is useful in understanding how to ask people to slide in meaningful ways that allow access and hold space for people to recognize their resources.

Small Event using Self-Select Methodology: I worked for a few years managing events for someone who wanted to implement sliding scale and was, in my opinion, regimented and uptight about it. "Just let people be honest and self-select," I thought, until she shared with me a story. She had allowed a woman who was not working to pay at the bottom of the scale for an event, and then the woman cancelled last-minute, saying her husband surprised them with a trip to Bermuda. It turned out the woman wasn't working because she didn't want or have to, which was obviously not what the scale was intended for, even if she technically qualified. Solution: explicit instructions and demonstrable scales.

Conference using Narrative/Self-Select: I was helping plan an LGBTQ community conference that had a mandate of accessibility in all regards, including economic. We wanted to offer no-cost scholarship options to people as well as work-trade in a self-selecting way: Applicants would just pick which track would enable their attendance. Scholarships were provided by a different committee, and I was leading the media work study track. It was a harsh moment when on the first day of the conference I looked over my team, and saw it was all working-class cisgendered people, low-income trans and genderqueer people, and women of color who were to be volunteering alongside me (busting their butts). Who was on the very short scholarship list? At least one white person from a well-off background who was just enjoying

A COMBINATION METHOD

6. Ride Free Fearless Money and Let's Talk About Money

In my financial coaching with Ride Free Fearless Money and classes with Let's Talk About Money, I use a combination of income guidance, like Third Root, narrative, like Worts and Cunning, and self-select, like Pronoia, in that I give people guidelines and then allow them to pick where they fit without pre-approval. See Figure 3 and learn more online at ridefreefearlessmoney.com/about/fees/.

How do I decide where I should land on the scale? Try this:

Scale:	Bottom	Low	Medium	High	Top
Earned assets*	- Unemployed + no UI - Employed marginally	- Unemployed with UI or employed marginally	- Employed, make $25-45K	- Employed, make $45-65K	- Employed, make over $65K
Unearned assets	- Family has no assets or - No access to family	- Family has some assets	- Family has assets, like a house they are paying - I'm able-bodied	- Family has many assets, like paid-off house - Someone else paid or pays my rent/ mortgage	- Family has many assets, like investments - I have access and gave it away - Someone else paid or pays my rent/ mortgage
Privilege and $$	- Student loans and I was the first in my family to go to college - I help my family with $	- Survival credit card debt	- Student loans and most people in my family have higher education	- Student loans for professional or post-secondary education	- My college was paid for

Figure 3

the conference. I needed to know: Why did they apply for the scholarship and not work-trade? Their answer: They were working part-time and didn't feel they could pay. I thought a lot about who feels entitled to ask for a break, who feels right about the option to "not work," and whose contribution of work "earns" them access. I thought about the difference between working by choice or for survival. To this day, I won't do work-trade anymore: Working class and poor people work extra enough already. Solution: explicit instructions and providing narrative description of sliding scale.

Conclusion

If you've read all this—you rate really high on my personal sliding scale of committed critical thinkers! I hope taking a tour of some different approaches, successes and messes has helped you think through your sliding scale choices. ■

Hadassah Damien was raised poor in upstate NY and has put the working-class values she inherited both into practice and under microscopes. She has an Honors BA from the University of Toronto, and an MA from the CUNY Graduate Center. Hadassah is the technology manager at Participatory Budget Project. Learn more at hadassahdamien.com.

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