Grassroots Fundraising Journal

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Grassroots Institute for Fundraising Training

Major Donor Surveys: A Three Year Case Study

Visit a Donor, Not an ATM

The Movement for Japanese American Redress: Part II

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FEATURE

ON OUR COVER

Inter Pares, a social justice organization, staged the documentary play Seven in Ottawa, Canada in April 2017. The artwork featured on our cover was created for the performance by Inter Pares staff member Rebecca Wolsak. Seven is a play about women’s rights, and was performed by local activists and directed by Jessica Ruano. Learn more about Inter Pares and their major donor program in our feature article, “Major Donor Surveys: A Three Year Case Study.”

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Comings & Goings

I WANT TO OPEN THIS ISSUE by expressing my deep appreciation for Sonny Singh, who I've had the pleasure of working with as the *Journal's* copy editor since 2012. Sonny has been so easy to work with—a strong writer and editor, flexible with shifting deadlines due to articles coming in earlier or later than anticipated, and always good about communicating with me when his schedule was going to be ramping up.

Besides being in an awesome band that tours extensively (redbaraat.com—you should check them out and see if they're coming to your area soon), Sonny also recently took on a full time job with IHP study abroad program. Their gain is our loss, as this issue will be Sonny's last as copy editor. I'll miss working with you, Sonny, and am grateful to have had the opportunity to collaborate with you.

As sad as I am to see Sonny go, I am thrilled to share that Chela Delgado will be joining our team. I first met Chela nearly 20 years ago when I worked at Race Forward (what was then known as the Applied Research Center). Raised in Oakland, Chela attended the same public elementary and middle schools where my children are currently enrolled. In addition to having extensive writing and editing experience, Chela also teaches government and economics at Coliseum College Prep Academy. Welcome, Chela!

I also want to extend a warm welcome to those of you who signed up for our special bundled subscription offer with the *Nonprofit Quarterly*. If this is your first *Journal* issue, you are in for a real treat. First, Jack Hui Litster—who shared that much of his learnings in his four years as a fundraiser have come from *Journal* articles—provides a sequel to his January-February 2016 article, "Surveys and Segments: Building Your Major Donor Strategy." Jack reflects back on the three years since Inter Pares first launched their major donor survey, sharing adaptations they've made, advantages and considerations for various distribution methods, and ideas for how small shop development teams can start moving towards individualized approaches to engaging major donors.

Next, former *Journal* editor Stephanie Roth shares insights she gained from her recent stint as a major gifts officer, and provides a helpful guide for meeting with donors in person when you're *not* making an ask. We conclude the issue with the second part of an article that began in the March-April 2017 issue, "Funding the Impossible Dream: The Japanese American Movement for Redress." Rona Fernandez and Stan Yogi complete the story of how community groups using varied strategies powered by grassroots volunteers and donors, were able to achieve reparations for the grave injustice committed against Japanese Americans during World War II.

Speaking of grassroots support, we invite you to join our spring campaign to raise $25,000 so that we can meet the increased demand for discounted trainings we've experienced since the election. Turning to our communities for support is more critical to our success than ever, and we want to be able to share our training, tools and resources as far and wide as possible. If you believe community support is essential to building healthy and sustainable movements for social justice, please visit grassrootsfundraising.org/donate to pitch in. Thank you so much in advance for your consideration and generous support!

Jennifer

PHOTO CREDIT: KATHRYN DINGLE

Responding in person to an Inter Pares major donor survey, Jack with Inter Pares board member and major donor Sari Tudiver.

Major Donor Surveys

A Three Year Case Study

By Jack Hui Litster

THIS ARTICLE FOCUSES ON MAJOR GIFT STRATEGIES, and is a sequel to an article that I wrote titled “Surveys and Segments: Building Your Major Donor Strategy,” in the *Grassroots Fundraising Journal’s* January-February 2016 issue. That article was a retrospective on a strategy Inter Pares had undertaken in 2014. In that piece, I described taking our group of 275 major donors and identifying the top 150 donors, then gathering information from that group through a survey, and subsequently creating five segments of our major donors and building strategies for each segment.

This article is a deeper study of our organization’s major gifts program and our use of surveys. We’ll expand on the question, “Why use a donor survey?” Then we can look at the survey Inter Pares designed in 2014, some refinements we’ve made, and what we have learned from surveying by mail, email, phone and in person. Last, we will talk about how we, as grassroots organizations with small fundraising shops, can realistically start to create major gifts strategies that are tailored specifically to the individual people in our major donor group.

Why Surveys?

Three key advantages to implementing a major donor survey are:

- **Surveys are a means for donors to share their intentions for their relationship with your organization.** Generally speaking, whether or not a donor takes the time to complete a donor survey is a good indication of their interest in deeper engagement with your group. You may have major donors who prefer to make their gifts and otherwise have no further engagement with your organization. These individuals will likely choose not to fill out your survey, and in many cases they also won't answer your phone calls or emails. When these patterns emerge, this is a clear indication that this person does not want to be involved beyond donating to your organization, and you can respect their wishes by not engaging them through the major gifts strategy you create.

Of the donors that do take the time to fill out and return your survey, there will be some who engage fully in this process, will give you extensive feedback, and are clearly and explicitly holding the door open to deepening their conversation and relationship with you. Others who take the time to fill out the survey may be giving you quite different signals. Some will fill out the survey with the most minimal effort, answering as briefly as possible or not including any comments in your long answer questions. Others will explicitly take the opportunity of the survey to give you the feedback that "I don't want relationships with the charities that I support."

BEFORE YOU SEND OUT YOUR SURVEY, THINK ABOUT WHAT CHANGES YOU ARE HOPING TO IMPLEMENT AFTER YOU RECEIVE RESPONSES FROM YOUR DONORS.

No matter what signals you receive from the donor, this is all useful information, and can help you build a strategy for engaging with each of these donors in the way that they prefer. One caveat to remember is that just because someone does not fill out the survey does not necessarily mean that they don't want to engage with your organization. This can be the case when someone who you know is interested in having a relationship with your organization, or who already has a strong relationship with members of your organization, does not respond to your survey. Keep in mind that many people will lose track of the survey or will receive it at a busy time and never get around to filling it out, despite possibly having the interest and intention of doing so.

- **A survey is a conversation starter.** As soon as you send out your surveys, you are opening the door to having individual conversations with your donors (Awesome! This is what we are supposed to be doing as fundraisers right?). But remember to design your survey questions carefully. If you throw in lots of questions on many different issues, then you need to commit to taking the time to honestly engage in the conversations that are going to ensue.

Before you send out your survey, think about what changes you are hoping to implement after you receive responses from your donors. In other words, what aspects of your major gift fundraising strategy are you most interested in refining? Are any of the questions you ask outside the scope of donor engagement you are willing to take on? For example, don't include a question about interest in volunteering with your organization if you have no existing volunteer program and no intentions of setting one up. Don't waste your donors' time asking irrelevant questions just for curiosity's sake, as it can raise donors' expectations and set them up for disappointment.

To help decide what questions to include, it can be helpful to determine what the goals of your survey are. Some possible goals could be:

- To determine which major donors want to get more involved and deepen their relationship with your organization (e.g., through volunteering, serving on the board, offering their expertise, etc.)
- To determine which of your major donors are interested in increasing their of donations (or are open to a conversation with you about that)
- To determine which of your major donors have the greatest affinity for your organization
- To receive feedback from your major donors on what they think your organization is doing well and what could be improved
- To find out how your major donors want to keep in touch with you (visits, events, phone calls, email, mail, or not at all)

- **Surveys give you the information that your organization needs in order to build a strategy for your major gifts program.** I'm going to expand on this more at the end of this article. But I want to note here that while there is a strong and growing body of writing and training on major gifts fundraising, which can and should inform the approaches you include in your major gifts strategy, it is important to keep in mind that each organization is unique. More than this—remember that every organization's group of supporters is a unique combination of individual people. And the history with the organization and the type of relationship that your donors have had with your organization, will be different from organization to organization. Because of this, it is important to build your major gifts strategy—of all fundraising strategies, the one that is based most on building relationships one-on-one with individual people—from an understanding of who your organization's major donors are right now. There is no one-size-fits-all major gifts strategy. There are a variety of approaches and relationship building ideas that you can include, but the strategy of how you apply those ideas will depend on who you have in your group of major donors. So, if you are setting up a major gifts program, or are refining an existing major gifts program, you absolutely need to start with getting to know who your major donors are.

Inter Pares 2014 Major Donor Survey: Questions We Asked Then, Questions We Are Asking Today

Here is the original major donor survey that Inter Pares sent to all of our 150 major donors in May 2014:

INTER PARES 2014 SURVEY

Please complete this survey and return to Inter Pares before July 1, 2014. Thank you!

Continuing engagement with our dedicated long-term supporters.

1. Inter Pares and our counterparts concentrate on six specific themes of work, across four regions. Which themes and regions interest you most?

   (Choose as many as you wish from the list below)
   - ☐ Economic justice
   - ☐ Food sovereignty
   - ☐ Health
   - ☐ Migration
   - ☐ Peace and democracy
   - ☐ Women's equality
   - ☐ All of the above

   - ☐ Africa
   - ☐ Asia
   - ☐ Latin America
   - ☐ Canada
   - ☐ All of the above

2. What motivates you to support Inter Pares?

   Please choose as many as you'd like.
   - ☐ Our values—equality, social justice, participation, feminism.
   - ☐ Our approach—solidarity, long-term partnerships, linking international issues to Canada
   - ☐ Your relationship with Inter Pares staff
   - ☐ The direct support we provide to our international counterparts
   - ☐ Our financial management—low administration and fundraising costs, equal and modest salaries
   - ☐ Other:

   ____

3. What do you appreciate about Inter Pares?

   ____

   ____

4. Many of Inter Pares supporters are also involved in other causes. Please help us to have a better sense of how many organizations you are involved with.

   (Please check one)
   - ☐ I support over 10 charities each year
   - ☐ I support between 5-10 charities each year
   - ☐ I support less than 5 charities each year
   - ☐ I only support Inter Pares

   Comments: ______________________________

   ____

5. Is Inter Pares one of your favourite charities?

   - ☐ Inter Pares is my favourite charity
   - ☐ Inter Pares is among my top five favourite charities
   - ☐ I provide similar levels of support to many groups, and I don't have particular favourites

   Comments: ______________________________

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6. Do you feel that you receive enough information on how your donations are used by Inter Pares?

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7. Our supporters each take their own approach to making charitable donations. From the examples below, please choose any approaches that apply to you.

- ☐ I follow the budget that I set out each year for my charitable donations
- ☐ I give the same amount to all the charities that I support each year
- ☐ I decide throughout the year which charities to support
- ☐ I decide throughout the year the amounts of the donations that I will make
- ☐ Other (please tell us more about your approach):

____

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8. Based on your understanding of the future uncertainties of government funding to social justice organizations such as Inter Pares, would you consider increasing your support to Inter Pares?

- ☐ I would consider increasing the amount of my contribution to Inter Pares each year
- ☐ I would consider a one-time increased gift to Inter Pares
- ☐ I would like to increase my support to Inter Pares, but cannot afford to do so in the foreseeable future
- ☐ I am not interested in increasing my support to Inter Pares
- ☐ I would like to discuss strategies for future giving, such as a bequest

Comments:

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9. Is your relationship with Inter Pares stronger or weaker than the relationships that you have with other organizations that you support? How can Inter Pares improve?

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10. Each year, Inter Pares staff will approach a small number of individuals and organizations among our most dedicated long-term supporters to discuss strategic ways to support Inter Pares. Would you be interested in meeting with Inter Pares staff at some point in the next few years to discuss making a special donation?

(Choose as many as you wish from the list below)

- ☐ I would appreciate being asked for a specific special gift, and would consider the request and decide for myself whether it is a donation I can make at that time
- ☐ If I am approached to make a one-time special gift, I would prefer that the donation go to support a particular Inter Pares program of my choice
- ☐ If I am approached to make a one-time special gift, I would like my donation to be allocated by Inter Pares' co-managers to programs as needed
- ☐ I do not wish to be asked by Inter Pares staff for a special donation

Comments:

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11. Inter Pares staff and board members travel to various regions of Canada as part of our collaboration with Canadian counterparts, and to engage with the public and share our work. When possible, we visit with our supporters in these regions. The goal of these visits is to keep in touch with supporters as individuals in order to better represent their values in our work. Would you be interested in meeting with Inter Pares staff and board members in the future?

(Please check one)

- ☐ I would like to meet with Inter Pares staff
- ☐ I am not interested in meeting with Inter Pares staff
- ☐ I have already met with Inter Pares staff and would appreciate another visit
- ☐ I have already met with Inter Pares staff and feel that another visit is unnecessary

Comments: ______________________________________

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12. There are many ways of engaging with Inter Pares in this work for social justice. Are you interested in any of the following possibilities?
    - ☐ Encouraging family and friends to donate to Inter Pares
    - ☐ Encouraging family and friends to sign up to receive Inter Pares Bulletins or e-newsletters
    - ☐ Hosting a gathering of Inter Pares supporters or potential supporters in my area
    - ☐ Providing Inter Pares with a written or video testimonial that explains why I support Inter Pares
    - ☐ I feel that I am already doing as much as I can to support the work of Inter Pares
    - ☐ Other (please tell us more about your ideas):

____

____

Please share any further comments that you may have:

____

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Inter Pares and our counterparts continue to deeply value your support.
Thank you for taking the time to share your feedback, which shall remain confidential.

While the version of the survey shown above was the version used for all the print and email surveys we sent in 2014, when we did a subsequent round of surveys by phone and in person, we made some adaptations.

One of these adaptations came out of the realization that when talking to major donors who make significant monthly gifts, there was a need to nuance the questions (#8 and #10) about whether the survey respondent would be interested in increasing their gifts. We decided, after some constructive feedback on this question during one of our phone surveys, that we would preface that question with a statement about how much we appreciate the person's existing support. We also decided to expand on question 10, so if the donor said in person or by phone that they would be interested in discussing a special gift, we would then have three follow-up questions:

10a. How would you prefer to have that kind of conversation (about a special request for a gift)?
- ☐ In person
- ☐ By phone
- ☐ In writing (email or mail)

10b. How frequently would you be open to discussing a special request for a gift with us?
- ☐ Only once
- ☐ Once every three to five years
- ☐ As often as once a year

10c. If we approached you with a special request for a gift,
- ☐ You would prefer that the donation go to support a particular Inter Pares program of your choice
- ☐ You would like your donation to be allocated by Inter Pares' co-managers to programs as needed

We also updated question 12 about other ways of getting involved, changing and expanding that list with some more concrete and interesting (but trying to remain realistic) opportunities to get involved in our work.

Survey Communications Channels: So, Should I Call You?

From May 2014 to date, we have undertaken three different phases of surveys. The largest phase, with the biggest response, came first. In May 2014 we mailed 150 surveys to our major donors and received 80 back over the following three months. In August 2014 we did a follow-up online survey for people who had not completed the mail survey. This time we used a shortened version of the same survey, set up as a form on our website, and we emailed the link to that survey to about 40 people (we did not have email addresses on file for everyone who had not completed the survey at that point). We received about 10 survey responses through this email version, and those responses were all received within about one week.

One and a half years later, in early 2016, we started another phase of following up with people who we had not heard from in the initial surveys. This time we tried surveying by phone and in person. For various reasons, we did this phase at a much slower pace and on a much smaller scale. In all, I did five surveys by phone and five surveys in person in 2016-17.

Comparing the four communications methods for surveys, each have their own particular benefits, and each approach will appeal to different people.

Surveys as a Form of Prospect Research: Mail and Email

Advantages of Using Mail:

- Mail and email are the easiest strategies to send out on a mass scale all at once.
- Because some people take time and can be more reflective in filling out a paper survey, you can potentially get very

detailed and clear responses (and quotable quotes, that you may be able to use, with the donor's permission, either for sharing with your staff/board team, or in your public communications).

- This is the one strategy that you can likely use to reach everyone in your major donor list. You may not have every donor's email address or phone number on file and you may not be able to meet everyone personally, but you probably have everyone's mailing address.
- If you take the time to handwrite names and addresses on the surveys, you can get a high open rate.
- Since it is a mailing, you have more space than email for a longer survey and/or to include a cover letter or other information in the mailing, if you feel that will be useful.
- You can include this survey as part of another mailing that is already going to your donors.

Considerations When Using Mail:

- If it is a large mailing you may receive a large volume of responses, and so you will need to set aside the necessary time for both survey follow up[1] and inputting the responses into your database.
- Because sending a mailing through the postal service can take some time, and paper copies can get buried on someone's desk, you may be receiving responses over a period of weeks or months.
- Inputting the survey responses into your database may require some tedious typing of responses or scanning in the paper survey as a PDF.
- You may not be able to read everyone's handwriting.

Tip: Make sure you put the donor's name on the survey before you mail it to them. You don't want to be stuck with a survey that has been returned by mail, with amazing feedback, but no way of identifying who it is from (this happened to us with two copies of our surveys that were sent back with detailed responses but for which we somehow missed putting the donors names on before mailing).

Advantages of Using Email:

- People respond to email surveys in a fairly short time window, so you are likely to receive a flurry of responses, and then nothing.
- It is very easy to import survey responses into your database if you receive them electronically as text.

1 Your survey follow up is likely to include answering questions raised, thanking people for their comments and suggestions, and sending information that people requested.

Considerations When Using Email:

- Depending on your donor base, not everyone will have an email account, and not everyone will want to share their email address with you.
- Many people feel they receive too many emails, and may not have time to open your email, or may open it at a busy moment in their day and don't feel they have time to respond, and then the email soon gets buried in their inbox and forgotten.
- To do this in a way that is easy for donors to provide information securely and confidentially, you need to be comfortable setting up a webform either through your own website or through a platform like surveymonkey.

Surveys as Cultivation and Direct Relationship Building: Phone and In person

Advantages of Phone Surveys:

- You can do these at your own pace, either spread out over a period of time, or all at once during an intensive period.
- You receive feedback in real time.

Considerations When Surveying by Phone:

- Taking the time to do a survey is something that your donors will likely want to plan into their schedule. It is a good idea to set up phone surveys in advance (i.e., arrange a time in advance that is convenient for your donor via email).
- Some of the questions in your survey may be sensitive (e.g., asking someone if they would consider increasing their support), or may require some reflection. Being at the other end of a phone line means you will not benefit from any visual cues or body language to help understand how the person is reacting to the question. Likewise, the donor you are speaking to will not be able to read your body language if you are trying to nuance how a question is framed.

Advantages of In Person Surveys:

You can do these at your own pace, either spread out over a period of time, or all at once during an intensive period.

- You receive the feedback in real time.
- This can work really well as a kind of guided conversation, and usually you will have a bit more time available in person than you would over the phone (since you've already taken the time to get together in person, there is less of a rush to wrap up a phone call and move on). Take the time to really explore any of the questions in as much or as little detail as your donor wants. If you go on a tangent and depart

from the question for a while, don't worry about it, follow the flow of the conversation.

- These can work really well in your first meeting with someone, as a way to structure the "getting to know our donors preferences and where their passion for our work is focussed" process of relationship building
- This can also work well for discussions with donors who you already know well, but you need to tailor the survey for them specifically, and ask them questions that would not have not come up in your previous conversations. For example, if you are doing a survey in person with a donor who you know well and have spoken with and/or met in person many times before, you don't want to ask the introductory generic questions that you already know the answer to. But maybe you want to ask some questions about whether they are interested in engaging more deeply. These kinds of questions could include:
  - In addition to the ways you already support our work, are there other ways you would be interested in getting involved?
  - Would you be open to discussing a gift for a specific new initiative?
  - If so, how often would you be open to having that kind of discussion?

Considerations for In Person Surveys:

- If you haven't told the donor you are planning to conduct a survey with them in advance of your meeting, you often don't know where the conversation in a donor visit will lead. You also don't know how much time you have with the donor, and it can be difficult in the flow of your conversation to segue into, "So I brought along this survey, do you mind if we fill it out together?" In these kinds of situations, if I really want the donor's feedback through the survey, I have either left a print copy of the survey with them at the end of the visit, or have mailed/emailed them a copy of the survey as follow-up after the meeting.
- If you want to do a large number of surveys at once, trying to do them all in person is not the way to go. This approach is time-consuming, but it is time very well spent.

- Keep in mind that for surveying in person, you also need to take the time to write down your donor's responses. Capturing responses in adequate detail and asking all the questions can be a bit exhausting. All the more reason to take your time, as long as the donor is not pressed for time during the visit.

Tip: A quick note on data collection: For survey questions with multiple choice responses, we set up new attributes in our database for those questions so we could create queries based on responses to particular questions.

This Is Just for You: Individualized Major Donor Strategies in Small Shop Fundraising?

Ultimately what you are doing with your surveys is gathering information from individual major donors who are sharing their interests, preferences and intentions with you. In my 2016 *Journal* article, "Surveys and Segments: Building Your Major Donor Strategy," I discuss in detail how you can use the information you gather in your surveys to group people into segments based on the kind of relationship they want to have with your organization. It may be that segmenting your major donors is more of a conceptualizing tool, rather than a practical basis for your strategy.

In other words, you may find it useful to look at your major donors in three ways:

1. Zoomed in all the way, which would be looking at each individual donor.

2. Zoomed out partially, looking at one of your segments, which could be a subgroup of 15-30 people or one-third to one-eighth of your total major donor group depending on how you create your segments.

3. Zoomed out all the way, which is looking at your entire major donor group as a whole..

There are particular strategies that make sense to apply to your entire major donor group. For example, by making it standard practice to phone each of your major donors at least once a year, or being sure to send a handwritten card or thank you phone call each time one of your major donors makes a gift. It can also be useful to apply strategies to just one segment of your major donors, because a strategy for a subgroup of 15-30 people is much more manageable than a strategy you apply to 150 people.

However, moving beyond strategies for segments of your major donor group, I want to move on now to something that we really need to be talking about: one-to-one strategies for your major donors. And I don't just mean one-to-one one-time activities. I mean crafting ongoing strategies specific to one individual at a time in your major donor group. Before you stop reading, throw this article in the air and say, "Come on now, do you honestly think we have the time to build a strategy for one single person? Don't you know how much else we have going on in our workday?!" Please, bear with me on this…

It is vitally important to begin working on what your ongoing strategy is for individual major donors. You will need to decide, based on your capacity, how many of your donors this will be feasible for. But I suggest you do take the time to identify, at a minimum, the three to five donors at the very top of your major donor group (the donors who have made the largest gifts in the past three years), and ensure you are doing an excellent job of keeping in touch with them on a regular basis. The number of major donors for whom you have the time to build and track individual outreach strategies is up to you. It needs to be based on a realistic understanding of your own capacity and time.

For several of Inter Pares' top 10 donors, when I look in their donor record, I can see the number of interactions we have had with them in the past 12 months and for at least three of them, over the course of a year our outreach totals over 10-15 interactions by email, phone and in person. On the flip side, before we had systematically identified who our top 10 donors were, there were several of them who we had not kept in close contact with at all. We are trying to change this now.

Being realistic about the time you have available to work on your major donor program is also a process of recognizing that you will not have time to have ongoing one-to-one outreach through the year every year with everyone in your major donor group. If you accept this fact, which I think is healthy to do, then the next healthy step can be to analyze your major donor group and identify your top few donors who you absolutely must continue to keep in good contact with, no matter how busy you get.

For Inter Pares, our top 20 individual major donors collectively donated a total of 10 percent of our overall revenue in 2016. The depth of their commitment to our organization requires us to have a fundraising program that is organized enough to ensure their support is stewarded with great care and attention. If you are engaging major donors who want to support your organization, and are building mutually meaningful relationships with them, then this will be a natural and ongoing process. Eventually, it won't feel like "work" or another task on your overwhelming to-do list. ■

Jack Hui Litster works at Inter Pares, a nonprofit based in Ottawa, Canada, working on international social justice issues. The Inter Pares staff is made up of 15 co-managers and functions as a collective. All staff earn the same base salary, have an equal voice in decision making and an equal responsibility for managing the organization. Jack's fundraising responsibilities include Inter Pares' major gifts program, planned giving and foundation grantseeking. www.interpares.ca

Visit a Donor, Not an ATM

By Stephanie Roth

TWO YEARS AGO, AFTER WORKING AS A CONSULTANT for many years, I took an interim job as a major gifts officer for a reproductive justice organization. I felt strongly about the cause and also wanted to see what it was like to build a major gifts program in an organization that had major donors but not a well-developed program or plan for it. While I was only in the position for 10 months, I experienced the work from a different perspective that gave me new insights into what it really means to build meaningful relationships with donors.

One thing that actually surprised me was how much I enjoyed the work. I often found myself wondering, "Why do people say they hate fundraising so much, when at its best it's about spending time with people who share a passion for a cause, having interesting conversations with them (most of the time), and talking about how we can come together to make a difference in the world?" Of course I understand it's not always so much fun, donors can be difficult, getting meetings is often challenging, it's stressful having to meet a budget, and our organizations never feel we have enough money to do the work. But when you look at the outpouring of support for progressive organizations that happened after the election last year, you know that people really want to do something to make a difference and giving money is one thing they can do.

What I want to share in this article is about how to shift the focus of your fundraising from YOUR needs and YOUR schedule and YOUR activities to what resonates with and compels your community (including donors) to take action. The way this translated into my specific job as a major gifts officer was to get to know our donors on their terms, and at times other than when I wanted to ask them for money.

Many of my clients (and readers of the *Grassroots Fundraising Journal*) raise a high percentage of their funds from individual donors in the last three months of the year. There has been an unfortunate trend over the past few decades of concentrating solicitations at the end of the calendar year. This also means squeezing your efforts to speak with and sometimes meet with donors in a very short time frame, often from Thanksgiving through year-end.

The rationale for this is that it's the end of the tax year and the best time for people to figure out how much money they've earned that year and how much they can afford to give.

The problems for nonprofits trying to raise lots of money at the end of the year include:

1. They're competing with the other 1.5 million organizations in the country trying to raise money at the same time;
2. Year-end is a hectic time for everyone, including families with children on school vacation, people hosting and attending holiday parties, etc.;
3. The proverbial putting all of your eggs in one basket so that if something goes wrong (your development director leaves or gets sick or any number of things that can happen), you take a much bigger hit in your fundraising results; and,
4. Over 70 percent of Americans file a short form and receive no tax benefits from their giving so year-end is not meaningful to them from a tax point of view.

Even if this article does not lead you or your organization to change your fundraising calendar to spread out your fundraising throughout the year (and of course it can be difficult to do if your donors are so used to giving at year-end that they won't follow your efforts to change that), you can change up the timing of your efforts to meet with donors. In fact, in my experience, it can be easier and less anxiety producing to meet with donors when you're NOT asking them for a gift.

To help you plan for such a meeting, the following breaks down the parts of the meeting into a beginning, middle and end. There is no absolute formula for these phases, but this can give you some framework for planning that can lessen any anxiety you might have if you have no or very limited experience meeting with donors face-to-face.

Opening:

- Introduce yourself (unless you already know each other) and thank them for taking the time to meet.
- Settle in—ask how they're doing, if in a restaurant, order food or drink, making sure not to order anything that is super messy to eat.
- Explain the purpose of your meeting: "I'm so glad to have a chance to meet with you in person. As I explained in my email (or on the phone), we're trying to meet with as many donors as we can this spring to get to know you all better and gain a deeper understanding of why this work is important to you." If this is a meeting to introduce a new project or campaign that you'll be wanting to solicit their support for later on, you can say something like, "As you know, I'd like to speak with you about this exciting new campaign we're launching and see what questions you have and also gauge your interest in being part of it."
- OR start with a question, for example, "Before I tell you more about the campaign, I wanted to ask you what you already know about us, and what most interests you about our work."

Middle:

- This should be the most fun and engaging part of any meeting. Think of it as an opportunity to have an interesting conversation about the issues you're working on and what the organization is trying to accomplish. It's also a very important opportunity to get a sense of the person you're meeting with and what they think, appreciate and/or have questions about. Think of questions to ask the donor, many of whom (especially older or long-term ones) will have a long history of supporting and/or working on the issues you address in your work.
- Come prepared with the main points you want to make about the organization or a specific project or campaign. What do potential donors need to know? But also be prepared to focus on specific things the donor may want to know—not every donor is interested in the same things.
- This section of the meeting or call is the most organic. That is, it should flow from what interests or questions the donor has or the questions you ask of them. If they are not very forthcoming, you can always ask them what's most important to them in deciding to get involved with an organization, whether as a donor, a volunteer, or in some cases a board member. And if things lag a bit after that, you can ask if they have any additional questions for you. Then move to the close.
- Ideally there's something you'd like to get donors' opinions on, and you can say, "We're considering moving in this new direction and feel it would be helpful to get some advice/input/ideas from those who are closest to the organization and care most about it."

Close:

- This is the time to clarify next steps. If the meeting is purely a get to know each other opportunity or a time to thank and appreciate them for their past support, you can end the meeting by thanking them again for taking the time to meet, for any ideas they shared that you found particularly useful, etc. You can say something about being in touch with them over the course of the year, and hoping they'll continue to support the work.

- Ideally you'll get an agreement from them to consider a specific request for support down the road. Some ways to phrase it (but use your own words) include, "I'd like to follow up with you over the next few weeks to see if you have any additional questions about the campaign"; and/or, "Depending on what stage the construction is in, we'll be scheduling visits to the new space for donors and potential donors, and I'll let you know when those are happening"; and/or, "Once you've had a chance to look over the materials (and whatever else they indicate they need to do, e.g., talk with their partner), can I follow up with you to talk about a possible gift for this project?"

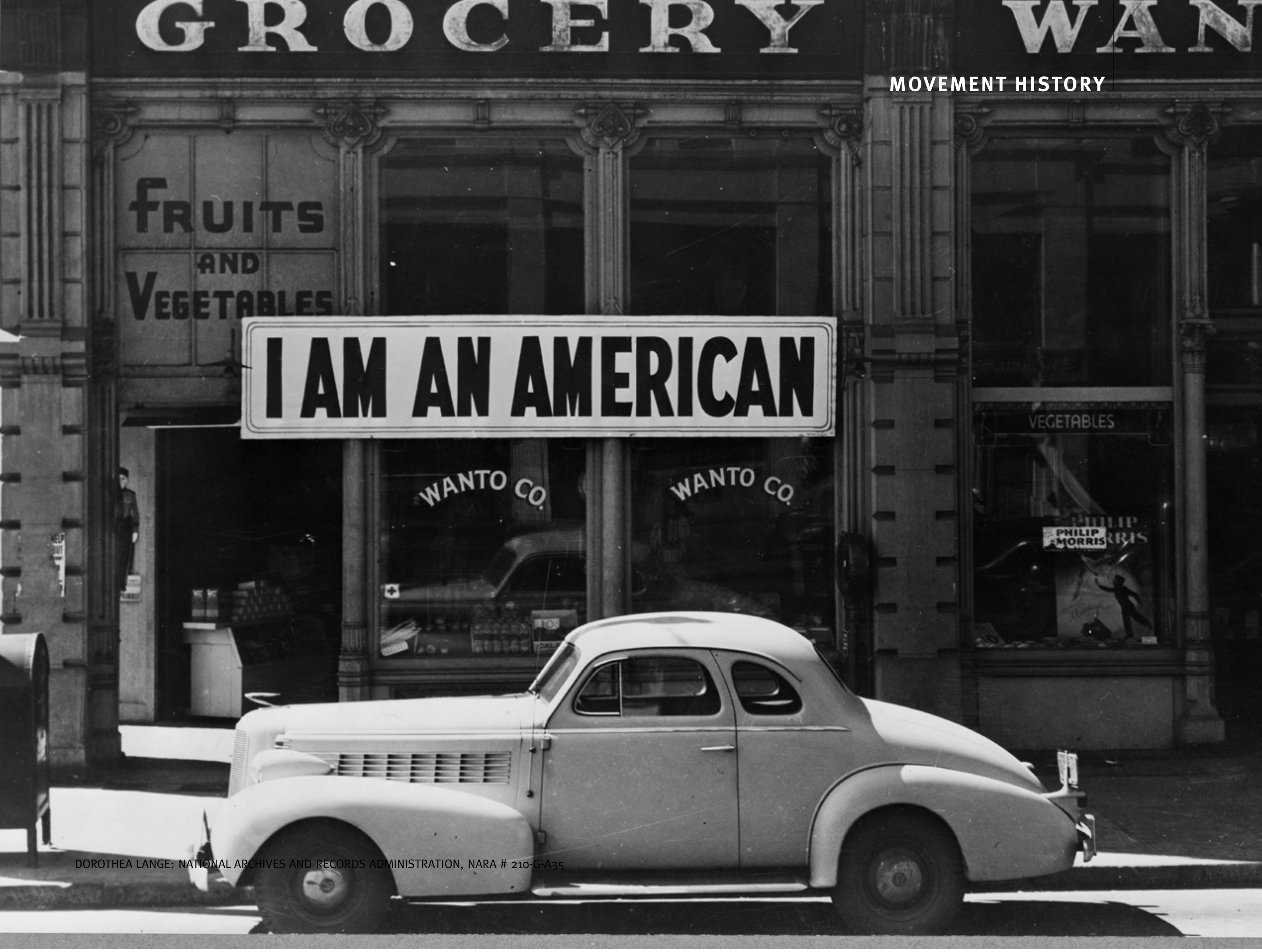
After they respond (whatever they say), thank them for their past support (if they've given before) and/or for taking the time to speak with you. Even if they say no to considering a gift to the campaign, thank them for their time and whatever feedback they've given you.

After the Meeting or Call:

- Write up any notes so you can keep track of anything you learn about the donor in your database.
- If there's anything they asked you that you said you'd have to find out and get back to them, make sure to do that.
- Send a thank you email as soon as possible, and include any next steps you agreed to.

The approach I've described above works best if you have a genuine interest in getting to know your donors better, believe they have something to offer the cause beyond their financial support, and enjoy having conversations about the issues you both care about. And by spreading out your efforts to meet with donors throughout the year, and not necessarily only at times when you're asking for money, you'll not only enjoy the time you spend with donors more, but will also have more success in raising money. ■

Stephanie Roth is a former editor of the *Grassroots Fundraising Journal* and principal of Klein & Roth Consulting.



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Wanto Co. was a store selling groceries and Japanese goods located on the corner of 8th and Franklin Streets in Oakland, CA. Store owner Tatsuro Masuda put up the "I am an American" sign on Dec. 8, 1941, following the attack on Pearl Harbor.

Funding the Impossible Dream

The Movement for Japanese American Redress: Part II

By Rona Fernandez and Stan Yogi

Editor's Note: This is the second of a two-part article. Part one appears in the March-April 2017 issue, which describes legislative and legal efforts—and the grassroots fundraising that supported them— by the Japanese American Citizen's League (JACL), National Council for Japanese American Redress (NCJAR), and National Coalition for Redress and Reparations (NCRR). If you haven't yet read part one of this article, please visit grassrootsfundraising.org/archive to do so.

Progress on the Legislative Front

Meanwhile, in February 1983, the Commission on Wartime Relocation and Internment of Civilians (CWRIC) released its unanimous findings in a 467-page report entitled *Personal Justice Denied*. It concluded that the wartime incarceration of Japanese Americans was not justified by "military necessity," as the government at the time claimed, but instead resulted from race prejudice, wartime hysteria, and a failure of political leadership. According to a CWRIC estimate, the total income and property losses suffered by Japanese Americans was between $810 million and $2 billion (in 1983 dollars).

The CWRIC's recommendations included a formal government apology, presidential pardons for the three men convicted of defying the exclusion orders, funding for an educational and humanitarian foundation to sponsor research and public educational activities, and payments of $20,000 to each surviving prisoner.

Using the CWRIC's recommendations as a guide, Japanese American members of Congress, Spark Matsunaga, Daniel Inouye, Norman Mineta, Robert Matsui, and their allies introduced redress bills from 1983 through 1987. During that period, Japanese Americans across the country strategically framed redress not as a parochial Japanese American issue but as a larger constitutional question; they did the painstaking work of creating a broad-based coalition of civil rights, labor and religious groups supporting redress.

VOLUNTEER PEOPLE POWER WAS AT THE HEART OF THE MOVEMENT, WHICH KEPT COSTS LOW AND COMMUNITY ACCOUNTABILITY HIGH.

The Japanese American Citizens League (JACL) took the lead in professional lobbying on Capitol Hill, hiring a professional advocate charged with devising legislative and communications strategies to secure redress. National Coalition for Redress and Reparations (NCRR) led grassroots letter-writing, public education, and lobbying campaigns.

Between 1982 and 1988, the JACL also fundraised a substantial amount of money to support the movement. As a chapter- and membership-based national organization, the JACL at the time had more than 32,000 members and 100 chapters across the country, many of which were local groups that predated the national organization, such as Nikkei women's clubs.

Some JACL members and chapters were able to contribute more financially. "Nisei were at age when they were established," explained Ron Wakabayashi, executive director of the national JACL in the 1980s. "[JACL] chapters had access to money." Historically, the JACL membership tended to be more middle-class and from professional backgrounds, which differentiated them from the more working class NCRR supporters.

The Nikkei community was concentrated in several major metropolitan areas, such as Seattle, San Francisco and Los Angeles. The JACL had strongholds in these cities. Chapters in these regions provided the community leadership, active volunteers, local relationships and infrastructure needed to organize successful fundraising dinners for the redress movement.

"Some place where there's a larger [Nikkei] population did a dinner, and more than one [for redress]… In a couple of years, you would raise $500,000," said Wakabayashi. Organizers of a Los Angeles-area dinner set a fundraising goal of $100,000 and met it, mostly through donations from Japanese American community members. This would be equivalent to nearly $250,000 today.

While big fundraising dinners like these often generate the bulk of their income from corporate sponsorships, the JACL was careful not to go too far down that road.

"There was a fairly conscious avoidance of Japanese corporate sponsorship," explained Wakabayashi. "During World War II, the country got us [Japanese Americans] mixed up with the Japanese. We didn't want to reinforce that," he added. Even though the redress movement was gaining momentum, one of the issues that plagued Japanese Americans during World War II—being perceived as Japanese and therefore not American—had not disappeared.

Bringing the Community to Washington

While the JACL had a professional lobbying presence in Washington, D.C., NCRR led grassroots efforts to write letters to members of Congress, to educate the community about the status of redress legislation, and to organize Congressional visits by former incarcerees.

NCRR passed the hat at its events and presentations. Members also collected names and addresses through sign-in sheets at these events. NCRR asked people sending lobbying letters to their Congressional representatives to give NCRR copies. Through these letter-writing campaigns, NCRR collected names and addresses of potential donors. NCRR volunteers sent fundraising mailings to their growing base of political supporters. The organization eventually built a mailing list of 1,600 people.

In 1987, NCRR organized grassroots activists from across the country to meet in the Capitol to lobby for redress legislation. NCRR leaders developed a creative fundraising campaign to support the effort and to symbolically involve people who could not make the trip. Many Issei in particular were elderly and sometimes infirm, but their presence in and importance to the redress movement was profound.

"We wanted them to be there in some way," said NCRR's Masaoka about the community members who could not travel to the nation's capital. "So we had them sponsor a ribbon with their name on it. We put these ribbons on a long string or rope and carried it with us to D.C.… When we had a gathering with the delegates and a couple of congresspeople spoke, we hung those [ribbons] in the room so that we felt the sponsors were in the room with us."

Gary Fujimoto, delegate from Asian Pacific Student Union, next to the hanging ribbons.

Ribbon sponsorships cost $20, making them accessible for many donors. NCRR received approximately 200 ribbon sponsorships, raising several thousand dollars. Ultimately, the organization fundraised or secured other resources to send a delegation of 141 people (many of them paying their own way) from all over the country to Washington, D.C.—an incredible feat of people power.

Victory at Last

The steady work on the legislative front by grassroots activists and policy advocates, along with the media and public education work done by groups like NCRR and the legal teams representing Korematsu, Hirabayashi and Yasui ultimately paid off. The House of Representatives passed redress legislation in September 1987, and the Senate followed seven months later.

Up to that point, President Ronald Reagan was poised to veto the bill. Redress supporters, however, reminded Reagan that as an army captain he participated in a 1945 medal ceremony for Kazuo Masuda, a Nisei soldier killed in Italy. When Masuda's family tried to resettle in Santa Ana, Calif. after the war, vigilantes threatened them. City leaders refused to allow Masuda's body to be buried in the local cemetery. Responding to this racism, the U.S. Army sent a delegation to Santa Ana to present the Distinguished Service Cross to Masuda's family. Reagan was a member of this military group. Prompting him to recall this incident was key in swaying him to approve the legislation.

On Aug. 10, 1988, President Reagan signed the Civil Liberties Act of 1988, which provided a formal governmental apology, $20,000 payments to Japanese Americans who were incarcerated, and the creation of a Civil Liberties Public Education Fund to help the public understand the exclusion and incarceration of Japanese Americans during World War II.

Several years earlier, federal judges overturned the convictions of Fred Korematsu, Gordon Hirabayashi and Min Yasui.

The National Council for Japanese American Redress (NCJAR) filed a class action lawsuit on March 16, 1983, suing the U.S. government for $27 billion for injuries suffered as a result of the World War II exclusion and imprisonment of Japanese Americans. The lawsuit not only addressed property losses but also constitutional violations.

NCJAR's legal challenge went all the way to the U.S. Supreme Court, which remanded the case to an appellate court that upheld a lower court's ruling dismissing the lawsuit. NCJAR once again appealed to the Supreme Court. Five days after filing that appeal, however, the Civil Liberties Act passed, and the Supreme Court denied review. Although the NCJAR lawsuit was unsuccessful, among its significant results was an admission by U.S. Solicitor

General Charles Fried, that racism, not military necessity, motivated the government in 1942 to exclude and incarcerate Japanese Americans.

Edison Uno, the activist who first proposed redress nearly 20 years before the passage of the civil liberties act, died of a heart attack in 1976 and never witnessed the realization of what in 1970 seemed like an impossible vision. He, like many others who had been imprisoned during the war, did not live to see their dream of redress realized. Nevertheless, tens of thousands of Nikkei received a formal government apology and monetary redress. What in 1970 seemed like a pipe dream was, nearly 20 years later, a political reality thanks to the tireless work of individuals who were active members of organizations like NCRR, JACL, NCJAR, as well as the attorneys representing Fred Korematsu, Gordon Hirabayashi and Min Yasui.

Fundraising Lessons from the Redress Movement

The deep relationships between fundraiser-activists and donors were key to the movement's success. Trust, confidence and accountability enabled redress movement leaders to raise the money they needed to pursue their varied and legal and legislative strategies. The JACL's Ron Wakabayashi recounted the responsibility he felt to succeed with their fundraising and legislative efforts for the movement: "My mom lived in Little Tokyo. You couldn't f—k up because mom wouldn't be able to walk in J-town. This was holy grail." Redress movement leaders and fundraisers knew that losing this fight would have a real impact on their families and communities.

Volunteer people power was at the heart of the movement, which kept costs low and community accountability high. NCRR's Alan Nishio says, "The fundraising was never a major challenge because we would tailor what we were doing to how much money we had." He added that volunteering created camaraderie and solidarity: "Those people that are willing to do the unglamorous work of mail-outs, etc., are the core of who you want as your friends. I think some of that is lost today. Groups have a broader reach, but less experience."

At the same time, all-volunteer efforts and groups that don't have money-savvy people helping with fundraising may not be sustainable over a longer period of time.

"There's a need for people who are particularly interested in doing this [fundraising] work, knowing that their efforts will be rewarded in creating social change," says Don Tamaki of Fred Korematsu's legal team. "That costs money. The more competent nonprofits have these folks in their infrastructure but the newer ones and the smaller ones don't… When people's energy runs out, they just retire or die, and no one else is there to carry the ball."

Don't underestimate the willingness or ability of the people who are most affected by an issue to donate. Donors to the redress movement came from all economic levels, generations and occupations. Nishio tells the story of one donor he encountered at a senior housing complex in Los Angeles' Little Tokyo:

We made our presentation [about the campaign] and passed the hat. An Issei, older woman…gave me a $10 bill, saying, 'This is all I can afford, but please do all you can.' And the social worker [from the housing complex] said that was probably 10 percent of the woman's disposable income for the week… For me, that's where it got more serious.

Fundraising was not seen as separate from the "real" work, but as an integral part of building a winning movement. The people who fundraised also organized politically and vice versa. Though some people were more numbers-oriented and played a larger role in appeals and other fundraising efforts, everyone played a role in raising money for the movement. Wakabayashi says, "I don't think of myself as a fundraiser." This reflects the experiences of other people who were interviewed for this article as well, who though they fundraised for the movement, did not see themselves primarily as fundraisers.

Organizer-fundraisers kept donors updated on what was happening with the campaign(s), which helped them feel more connected. Kathy Masaoka notes, "[NCRR's] treasurer would write a thank you and would create an update to report to people what had happened. And then they would donate again. We were all really conscious of how the money would be used."

Multiple organizations raised money for the movement, funding different strategies that all had the broad goal of winning redress for Japanese Americans. Each of the groups profiled in this article had a specific political or legal strategy, and carried out their own fundraising to support their strategy, based on their capacity. NCRR focused on smaller donors and the grassroots base of Nikkei, while the JACL mobilized its large membership base to raise bigger gifts for the movement; NCJAR tapped into its network for $1,000+ donors. This lesson is important especially now, when we may be tempted to try and put all our eggs in one basket as we struggle for unity during a time of division and fear. But in our diversity there can be strength, as the Japanese American activists who won redress have shown. ■

Rona Fernandez has worked with social justice nonprofits for the past 20 years, always with fundraising as a part of her work. Stan Yogi has more than 26 years of experience with nonprofit organizations in fundraising and grantmaking. Both are senior consultants with Klein & Roth Consulting.

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