

Grassroots Fundraising Journal

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GIFT
Grassroots Institute
for Fundraising Training



Building a Culture of Fundraising
Data Visualization for Social Good
A Case for Social Enterprise

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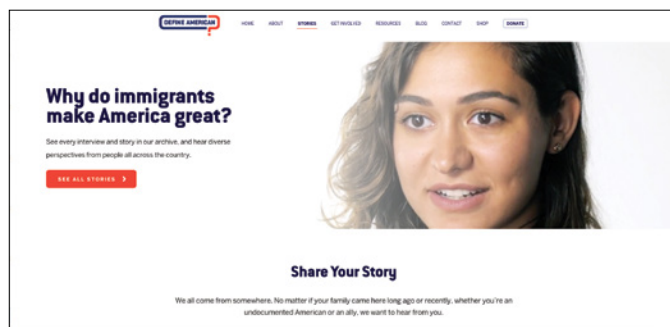
Does creating a culture of fundraising seem like an insurmountable task at your organization? Beth Rayfield shows us how we can overcome challenges and get on the path towards greater financial sustainability.



ON OUR COVER

A young girl carrying a U.S. flag joins her family at the 2017 May Day march in downtown Los Angeles. Over 40,000 people marched to call for an end to deportations and a legislative solution for the 11 million undocumented immigrants living in the U.S. The Coalition for Humane Immigrant Rights (CHIRLA) is a California leader with national impact made of diverse immigrant families and individuals who act as agents

of social change to achieve a world with freedom of mobility, full human rights, and true participatory democracy. Learn more about how CHIRLA created a culture of fundraising in our feature article by Beth Rayfield.



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PUBLISHER EMERITA
Kim Klein

EDITOR
Jennifer Emiko Boyden

GRAPHIC DESIGN
Chris Martin

COPY EDITOR
Chela Delgado

COVER PHOTO
Luis Tadeo, CHIRLA

GIFJ EDITORIAL BOARD

Yee Won Chong, Will Cordery, Ryan Li
Dahlstrom, Dolores Garay, Priscilla Hung,
Megan Peterson, Randall Quan, Michael
Robin, Stephanie Roth, John Won

For subscription inquiries, to request permission to reprint **Journal** articles, and for advertising information, please contact jennifer@gassrootsfundraising.org

GIFT STAFF

Jennifer Emiko Boyden
Communications Director
Veronica Garcia
Program Director
Nan Jessup
Finance & Operations Director
Crystal Middlestadt
Resource Development Director

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Tomás Rivera
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GIFT: 1904 Franklin Street, Suite 808
Oakland, CA 94612

info@gassrootsfundraising.org
gassrootsfundraising.org

PHONE: 510.452.4520

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Transformations

Because we are powerful. Because there is enough. Because our communities are teeming with brilliant, resilient people. Because we change each other with every word and every deed. Because good movement building is rooted in generosity. The first ever Reimagining Movement Resource Strategies Network Gathering is a wrap! Our coordinator and facilitator team sends you love from Detroit: the city with a mighty heart.

~Tanya Mote, Su Teatro
(Facebook post June 15, 2017)

HOW DO WE SHIFT FROM TRANSACTIONAL to transformational fundraising practices? How do we build new economies rooted in relationships of reciprocity and mutual aid? How can we create a more satisfying and engaging experience for donors? These are some of the key questions that inspired the first “Reimagining Movement Resource Strategies” network gathering and fourth “Resourcing & Sustaining Our Movements” track at the 19th annual Allied Media Conference (AMC), held June 15-18, 2017 in Detroit.

Each year, the AMC convenes more than 2,000 social justice organizers, media makers, technologists, fundraisers, and educators around the shared strategy of media-based organizing: any collaborative process that uses media, art or technology to address the roots of problems and advance holistic solutions toward a more just and creative world. Over the past several years, the AMC has given me a place to engage, experiment and connect with new ideas, strategies and cutting-edge leaders.

Throughout my two years on GIFT’s staff, I’ve found inspiration in the work of Movement NetLab and innovative thinkers like Mario Lugay of Giving Side. Since last November, the #AMC2017 team has been diving deep into these issues via video chat, shared Google docs, and kitchen table sessions. As we convened in Detroit, we embraced the possibilities and welcomed the roomful of fundraisers, movement builders, organizers, and radical philanthropists who showed up in their leadership and curiosity to change the ways we think about resourcing social movements.

I want to send a special thank you to network gathering and track coordinators Tanya Mote, Kendra Hicks, Joy Messinger, and Sophia Softky. I also want to thank the network gathering facilitators Allen Kwabena Frimpong, Mario Lugay and Veronica Garcia; and track presenters: Joy Messinger, Adam Roberts, Ann-Meredith Wootton, Beth Warshaw, Courtney Harge, Graciela Sánchez, Ivy Climacosa, Jamaine Smith, Jayeesha Dutta, Jenna Peters-Golden, Joe Rashid, Kirin Kanakkanatt, Lauren Valdez, María Cherry Galette Rangel, Mary Grace Wolf, Mi’Jan Celie Tho-Biaz, Molly Jane, Rhiannon Chester, Sage Crump, Tanya Mote, Toni Moceri, and Veronica Garcia. Without you, none of this would have been possible.

The articles in this issue of the Journal shed light on transforming organizational cultures, hearts and minds, and revenue streams. Beth Rayfield shows us how we can shift our organizational culture to one where fundraising is seen as an integral part of the work that is shared across staff and board. Next, John Won provides tips for presenting complex data in ways that will spur our supporters into action. Julie Voyles and Sonya Ulibarri close out the issue with a helpful piece on the why and how of social enterprise for nonprofits.

If you have a suggestion for a future Journal article, please reach out to jennifer@gassrootsfundraising.org.



LUIS TADEO, CHIRLA

Members of CHIRLA and other immigrant rights coalitions gather at the break of dawn on Wilshire Boulevard and Alvarado Street to demand dignity and respect as part of the Caravana Contra el Miedo.

If You Build It They Will Come Creating a Culture of Fundraising

By Beth Rayfield, PhD

AS A FORMER UNION ORGANIZER, I believe in the saying that every worker is an organizer. As a development professional, I also know that every organizer is a fundraiser. And while the former is vital for economic justice in this country, I believe the latter is equally crucial to our ability to continue to fund organizing at our social justice nonprofits.

If you're reading this Journal, you know that fundraising at grassroots social justice organizations is a tough gig. It requires

long hours, resourcefulness on a tight budget, and stretched capacity from a small team. If you're lucky, you have a great partnership with your executive director and the dedication of a pro-fundraising board. If you're not so lucky, your leadership finds it hard to prioritize fundraising and you struggle with weak back-end systems and inadequate or nonexistent donor management systems. There are real challenges to our work and this is creating a crisis in the nonprofit sector. The average length that a

development professional stays in any one position is three years, and the average length that folks stay in the sector at all is seven years. The highly-cited national study, *UnderDeveloped* (2013), by CompassPoint and the Evelyn and Walter Haas Jr. Fund documented the lack of retention of high-performing fundraising staff and its costly impact.

At the same time, our revenue generation models are weakened by a lack of diversity in both our donor bases and our profession. Overreliance on foundation funding affects our long-term

YOU ALREADY HAVE DOZENS OF PEOPLE WHO ARE DEDICATED TO YOUR MISSION, KNOWLEDGEABLE ABOUT YOUR ISSUES, AND COMMITTED TO YOUR ORGANIZATION'S SUSTAINABILITY.

sustainability while the lack of people of color in the development profession means that predominantly white people own the money in our movements. Fundraising needs diversification in order to be a field in which talented, mission-driven organizers and people of color see their professional futures. Only this kind of shift will make our outreach to donors more relevant, sustainable and successful.

So the struggle is real but you still have a budget to raise, right? One way to increase the fundraising capacity at your organization is to build a culture of fundraising: a model of beliefs, behaviors and systems through which every member of your staff, board and leadership participate in fundraising in every budget year. In this way, you will increase your capacity to reach a base of donors and stakeholders and build organizational sustainability. At the same time, you will teach organizers and other organizational staff to feel ownership for the financial health of your nonprofit. Last, you will encourage all staff to consider fundraising an organizational priority, a core competency of their job, and a possible professional pathway for their future.

During my eight years as the development director at the Coalition for Humane Immigrant Rights of Los Angeles (CHIRLA), we worked hard to build just such a model. It was not always easy but I was fortunate to have the amazing leadership of Executive Director Angelica Salas, Associate Director Zerihoun Yilma and then-Board Chair Mary Ochs, who believed in this path and helped make it a priority. This work would not have been possible without the talent and creativity of CHIRLA development staff Silvia Fuentes and Tanya Gonzalez, and is continued by the

incredible contributions of Monica Gomez, Julio Martinez and Ana Reyes. I was also lucky to be surrounded by a management team and staff with many talented fundraisers that just needed training and systems to be successful.

This is where the title of this article comes in—"If you build it, they will come." You already have dozens of people who are dedicated to your mission, knowledgeable about your issues, and committed to your organization's sustainability. A culture of fundraising simply establishes the shared expectations and systems needed to put these talents to work for fundraising. Your staff and board are having thousands of conversations about your organization every year. If you could add a fundraising ask to even a fraction of those, you could increase your revenue, donors and reach exponentially without increasing your fundraising costs.

Why don't our organizations follow this practice already? Many of them do—some of you are probably thinking yes, we have an annual drive that everyone participates in or we have 100 percent participation from our board and top leadership. Great! Maybe you will find ideas here that will help you grow. Others are thinking, this would never work at our organization—our leadership would not support this, our board is not a fundraising board, our staff work so hard I could never ask them to take on a responsibility like this. These are real challenges but in movement work leadership is everything, and by this I mean YOUR leadership. Culture change doesn't happen overnight, it requires persistence, follow-up and follow through. Too often in development work, we see ourselves as support staff and believe our highest purpose is to serve the organization and the community. Guess what else is an act of service? Leadership.

Leading your organization to a new model or way of being is uncomfortable and it will be met with resistance, obstacles and relapses. Unfortunately, as development staff we know better than most that organizing dollars from foundations are on the decline and that the work we do is not possible without organizing. For this reason, we MUST increase our sustainability through individual donor development, we must acquire and retain more donors, and not merely through social media although this is important. Building a culture of fundraising is one practice that can help increase your donor base and your impact, and YOUR leadership is the one that is required to make this happen.

Conceptual Framework

One useful way to think about building a culture of fundraising or any organizational change is the Wheel of Change model, developed by Robert Gass, founder of the Social Transformation Project and co-founder of Rockwood Leadership Institute. The Wheel of Change proposes that successful organizational change

happens in three places: Hearts and Minds—our thoughts and feelings; Behavior—our choices and norms; and Structures—the external processes and practices that organize our activity. To build a culture of fundraising, all three of these components are important. In addition, they are iterative and will require repetition and renewal over time.

Hearts and Minds

This is an important starting point. We have deeply ingrained and cultural understandings of the propriety of asking for money, and these norms vary widely by race, ethnicity, class and gender expression. In order to ask others to fundraise, you have to know why YOU do. Of all the ways you could contribute to the move-

YOUR BASE MEMBERS MAY CHOOSE TO SAY NO TO DONATING, BUT THAT DOES NOT MEAN WE SHOULD NOT ASK.

ment or issues you are passionate about, why do you fundraise? Also important, how did you get to a place of comfort asking for money? There are many fundraising staff who do not actually like asking for money, let alone organizing other staff to do so. To work with staff on this issue, I encourage leaders to consider a fundraising story of self exercise, based on the Story of Self exercise by Marshall Ganz. Asking people to talk in small groups about their earliest memories of asking for and being asked for donations can help surface issues of discomfort many of us have around money. It is important for fundraisers to understand that they are asking for funding for something bigger than themselves, such as your mission.

I also find it helpful to remind fundraisers that because we are hardwired for altruism, acts of giving fire the pleasure centers of our brain. Asking someone to give is a gift to them; it is an opportunity to share their abundance and live their values more authentically. Another concern staff organizers have is about asking low-income people to donate. This is usually a concern of staff, not members and leaders who are low-income people themselves. Low-income people make decisions every day about how to use their resources, and it is our work to increase their agency not diminish it. Your base members may choose to say no to donating, but that does not mean we should not ask. Last, consider develop-

ing a shared fundraising vision for staff and board for clarity on how a culture of fundraising fits into your organizational mission, vision and values, and theory of change. This provides an organizational philosophy that helps anchor staff/board fundraising and serves as a rationale to guide the work as it grows.

Structures

Structures are the next method by which a culture of fundraising becomes normalized and expected as an expression of the mission and values of the organization and core expectation of each staff/board member's scope of work. This can be done in many ways that will be authentic to your organizational culture. Some suggestions are:

- **Support from leadership, executive director and board—ideally messaging comes from the top and is underscored by statements from leadership.** Start engaging your executive director on the issue of building a fundraising culture and how it could benefit the organization. Bear in mind, however, that sometimes you need to start doing the work and engage your leaders as you go. The first all-staff membership drive we did at CHIRLA actually happened while our executive director was on sabbatical but the management team provided the leadership needed to take this first step.
- **Our staff people are busier than ever in this new era.** Make sure their fundraising duties come at a predictable time so they can plan ahead. Annual fundraising vehicles such as a fall membership drive or a spring gala make it possible for them to know when “fundraising season” will come and allows them to manage their own duties as well as the folks they manage.
- **Remember that your organizers are campaigners and they understand campaign structure.** An annual drive that is linked to campaign priorities and is time delimited with clear goals and tracking is a familiar model. It should start with a launch event and end with a clear celebration and debrief of the goal met. Supporting the campaign structure with annual trainings, fundraising materials and coaching is important. A team-based fundraising competition can also be successful, featuring prizes and bragging rights for categories like most money raised, most new donors, and first to reach goal.
- **Fundraising responsibilities should be an explicit expectation of staff and board with fundraising participation communicated regularly through job interviews, staff meetings, retreats, evaluations, etc.** If fundraising does not get time on your all-staff agendas and is not integrated

into planning conversations, you are signaling that it is not an organizational priority for all staff.

- **Exercise your project management skills.** Design an oversight model that allows you and a team to follow-up with individual fundraisers to help them troubleshoot, offer coaching, celebrate successes, and hold them accountable.

Working With Boards

In fundraising, your board can be your greatest resource or your greatest challenge. Many boards already have a consciousness around a culture of fundraising or philanthropy, operating under a give or get policy or a 100 percent donation policy. But when I give workshops on this topic, I often have folks that say “Our board doesn’t fundraise.” OK, your board doesn’t fundraise... NOW. But you can start with what you’ve got.

When I joined CHIRLA in 2008, the stated position of our board chair at the time was that ours was not a fundraising board. However, there were members of the board who did want to fundraise so I focused on them, engaging them in our fundraising efforts and providing support for them to talk to their own networks. Over time this work became more robust, and when new leadership joined the board the vision for the board’s fundraising role changed, and we had a great foundation on which to build. The lesson here is to meet your board where they are and put your energy where there is the best return on investment. I guarantee you there is at least ONE person on your board that is interested in fundraising. Cultivate them. Support them in throwing a house party or soliciting their company or doing relationship building for the organization with their connections. Start small and make sure any success is communicated to the rest of the board and celebrated. This progress will show others what is possible and help spark their own fundraising ideas. With persistence, your board fundraising will grow and you will attract new board prospects that are interested in fundraising and see this as a normal part of your board’s culture. There’s a saying, “Rome wasn’t built in a day—but parts of it were.” Build a part—the rest of your city will come with time.

Once you’ve established your board’s culture of fundraising, you can grow it using the Wheel of Change as a guide.

- Engage in hearts and minds exercises with your board including a fundraising vision statement and a fundraising story of self exercise. These exercises can be done with board and staff together which is a great way for each group to be inspired by the other.
- Try to do a one-on-one with each board member annually to work through their individual fundraising plan—their personal pledge for the year, how they will plug into your

existing vehicles and other committee work or relationship building they might want to do.

- Establish cultural norms around board fundraising such as an annual fundraising goal of one to two percent of your budget with a goal to grow this number over time.

SUCCESS IN THIS WORK IS NOT ABOUT CHARM OR PERSONALITY—IT IS ABOUT DEEP LISTENING, AUTHENTICITY AND PERSISTENCE.

- Establish a board fundraising committee that works peer-to-peer with the rest of the board to support fundraising, make asks, and encourage accountability.
- Lift up successes as they happen and report outcomes annually. Don’t only include fundraising outcomes but new relationships, cultivation events, and board support for foundation, corporate or other solicitations.

One of the most important things you can do to support board and staff is regular fundraising trainings. It is good to develop your own training based on your organization’s mission, vision and values. Additionally, you can offer a training geared towards new staff once a year so they can spend extra time on the basics. Occasionally bring in a colleague or consultant as guest trainer to offer a new perspective. The components I like to include in my trainings are:

- An icebreaker or fundraising story of self exercise;
- A review of the shared organizational fundraising vision and how staff fundraising drives our mission;
- Fundraising campaign details, tactical options (will be different for an event versus a membership drive for example), timeline, and logistics; and,
- Role-play—this is very important. Fundraising is experiential not theoretical. People must practice making the ask. I like to role play one example in front of the group followed by a game where participants get “money” in the form of candy. They practice making “the ask” with a partner who will make a donation of one, two or three pieces of candy based on the success of the ask. Partners exchange feedback and we return to the big group for debrief.

The meat of the training should be the basics of fundraising, a drill down into the steps and workflow of outreach and follow-up.

I do my training using an acronym I developed called CRAFT (Contacts, Rap, the Ask, Follow-up and Thank you) and I train staff on the specifics of each component. I like the word CRAFT because some people feel that fundraisers are born, not made—that you either have that personality or you don't. My experience is that fundraising is a skill set and that the shyest, most introverted people can learn those skills and become great fundraisers. You may be surprised by who on your staff become real standouts at fundraising. Success in this work is not about charm or personality—it is about deep listening, authenticity and persistence.

The CRAFT Model

- **Contacts:** Fundraising is a numbers game. It doesn't matter if you have to raise \$1 billion, if you ask enough people, you will make goal. Help staff brainstorm a list of prospects two

AT SOME OF OUR ORGANIZATIONS YOU WILL HEAR PEOPLE SAY, "OH, I HATE FUNDRAISING." WHY IS THIS OK?

to three times the number needed to make their goal and divide into hot, warm and cold prospects. Start with a few hot prospects to polish your rap and confidence and work your way down the list. Divide your number of prospects across the weeks of the drive and front load to ensure that all your money is in the door by the end of the drive.

- **Rap:** What is the context of your fundraising ask? It should be timely, impactful and relevant to your donor and their interests. Use a few statistics to show you know your stuff but not too many, and relate it to your own story and experience. Encourage fundraisers to become donors themselves before they make an ask so they can share with donors why they themselves give.
- **The Ask:** Should be specific, direct and to the point. The ask is best followed by the "therapeutic silence," in which the fundraiser is silent and allows the donor time to respond without getting nervous and jumping in to persuade or bargain. Make your ask and close your mouth.
- **Follow-up:** People are busy—they may have the best intentions of fulfilling their pledge but can't quite get to it. Help your fundraisers think about the best ways to follow-up to get the gift in the door. There may be ways your development

team can support them in this, but remember a donor will feel most accountable to the person who got their pledge. If you get a maybe, make a plan to follow-up and stick to it. If you get a no, ask to add the prospect to the mailing list and reach out during the next drive. Remember good fundraisers are not the ones that hear the most yeses; they are the ones that can hear a lot of nos and still keep asking. The best fundraisers use deep listening to turn those nos into yeses.

- **Thank you:** Say it often and in as many ways as possible. Your organization's thank you is not sufficient.

Overcoming Challenges

One of the biggest challenges to building a culture of fundraising is that fundraising can be devalued at our social justice organizations. At some of our organizations you will hear people say, "Oh, I hate fundraising." Why is this OK? Your colleagues would feel diminished if you said, "I hate organizing," or "I hate educating our members." Fundraising is perceived to be separate from movement building—not transformational like organizing, not strategic like policy advocacy and campaign work, not a benefit to the community like direct service. It is seen as a necessary evil, a soft skill, a symptom of what is wrong with capitalism and the nonprofit industrial complex. In reality, fundraising IS movement building. It is one of the many ways that we educate, agitate and organize. Our donors are activists, advocates and stakeholders. They march with us, pray at our vigils, carry signs at our protests and yes, they invest in us. Our donors are us and each member of our organizations must engage them in this vital work of social change by seeking their time, talent AND treasure.

Another key challenge is capacity. Our staff members were stretched thin before the Trump administration came to power; their burdens now are overwhelming. One approach to this is to start small with an intention to build. Start with one drive, establish realistic goals and reach them. If you don't have time to mentor and follow-up with everyone, make note of your strongest performers and invest your time and energy there. Really lift up and celebrate fundraising successes so that people feel appreciated and that others are motivated and inspired. Follow-up, follow-up, follow-up—if people think it isn't on your radar, it won't be on theirs. Know that not everyone will be excited to fundraise, but some people will. Stay grounded in your mission to: 1) Increase sustainability of the organization, 2) Encourage fundraisers of color, and 3) Grow access to resources to support organizing over the long-term.

These things were the hardest for me:

- **Keep a sense of humor.** Fundraising can seem like life or death when your colleagues' jobs are on the line but if you

can't find joy in your work it's difficult to inspire yourself or others.

- **It's not personal.** Your fundraising team needs to feel accountable to your shared goal and each other, not to you. They are not fundraising for you, but for the organization, the mission and the community.
- **Keep it fresh.** Try to come up with something new every year—a new theme, a new competition, a new event element—something that feels different and fresh.
- **Anything is better than nothing.** You don't have to be perfect, just get started. Your confidence and competence will grow with time.
- **Celebrate success.** Be sure to send all-staff emails when folks reach goal, give shout outs in staff meeting and prizes for competition winners. At CHIRLA we would post a different fundraising thermometer in the hallway (one year based on Mario Brothers) where we would track our shared progress.

Building an organizational culture of fundraising is not easy. It does not happen overnight and it does require substantial over-

sight and project management. It may not be right for your organization right now. Nevertheless, building the capacity of your board and staff to fundraise can be a great way to increase your financial sustainability and flexibility, and can be part of the stakeholder engagement work that is likely already happening. It is also a way to engage the young leaders of color in our organizations in building a skill set that will be vital to them as they pursue their paths as elected leaders, executive directors and, hopefully, development directors. Building a culture of fundraising will not only increase access to dollars for organizing, it will also cultivate people of color to become owners of the money in our movements, making fundraising core to the realization of our vision for inclusion and justice.

Remember all that the next time someone tells you “I hate fundraising.” ■

Beth Rayfield is the director of institutional advancement at the Center for Community Change (CCC) and former development director at CHIRLA. This article is based on Beth's workshop by the same title at the 2016 Money for Our Movements conference in Denver, CO.

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We all come from somewhere. No matter if your family came here long ago or recently, whether you're an undocumented American or an ally, we want to hear from you.

When #FactsMatter

Lessons on Visualizing Data from Define American

By John Won

IN MARCH, I SAW JOSE ANTONIO VARGAS keynote a conference at the Pacific School of Religion in Berkeley on the role of faith communities in immigrant rights. Jose spoke courageously about living openly as an undocumented immigrant since 2011. As an openly gay Filipino American, this second act of coming out put Jose in the midst of a national firestorm around immigration reform. The political right portray undocumented immigrants as social threats, criminals, and unknowable “Others.” In contrast, as an award-winning journalist Jose was a widely-respected familiar face and trusted voice. While Jose’s coming out marked the end of his career in reporting, he used the tools of his trade to tell powerful stories about undocumented immigrants and other marginalized people. In 2011, Jose founded the nonprofit Define American, which puts the voices of immigrants into popular media and advances myth-busting facts to counter fake news. Together, the

stories of immigrants bolstered by data have the power to change hearts and minds around immigration.

Following my first article, “Telling Your Story With Data” in the November–December 2015 issue, this article will look at what Define American has done to communicate complex messages using data through their #FactsMatter campaign. We’ll glean lessons that will be relevant to your group; in particular how to broaden a nonprofit’s scope from engaging, educating and advocating for communities you serve to translating often highly nuanced impact into terms that anyone can understand.

Here are a few guiding questions for leveraging data visualization for social good:

1. Does It Have to Be a Chart?

OK, let’s say you have data you want to show. You’re so excited

about it and you want everyone to be as excited as you are. You think charting it is the way to go, which is great. But wait, does it have to be a chart? Let's pause to ask a few questions that will help ensure you'll actually reach your audience with the story you want to tell.

- Who is your primary audience? Do you know their information habits?
 - Are they a new or existing audience? Do you know their information consumption habits? (If not, you may want to do more research.)
- What are the ways they get information today? Do they include data-friendly forms?
 - Do they prefer to consume tweets shorter than 140 characters, eye-catchingly visual Instagram posts, friends' testimonials on Facebook, or more rigorous long-form journal articles?
- Can your story translate to one of those forms? Does your story come to life by showing it through data?
 - Is the content well-suited to the form? (Some aren't and shouldn't be forced to fit.)
 - Do you have the will and capability to take on that form?
- Last, what will it take for your audience to believe the data? Will data actually change how they think?
 - If you're engaging an audience that feels the way you do, you can tackle more complex issues. If they're already primed, they may do a bit more work to increase their knowledge.
 - If you're speaking to folks opposed to or critical of your point of view, you may need to try a different approach. For example, your data could include an emotional appeal that builds empathy, align with a universal human interest, or go through an influencer your audience trusts in order to change attitudes and openness to new information.

So, if you know your audience, if they consume data in their media diet, if your story can come to life through data, and if data will change how they think, great. If not, consider other options.

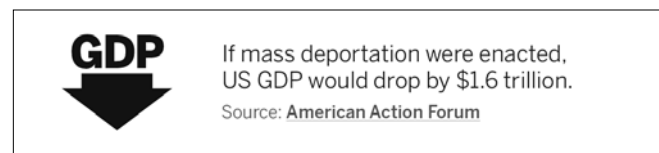
What does Define American do? They lead with human stories. They build empathy and connection between their audience and the lives of undocumented immigrants through relatable, personal and emotional videos, articles, and social-media posts. Why? Many Americans may not know or identify with undocumented immigrants, or how much worse their lives will become with increased enforcement, detention and deportation, much less a border wall. Then after building this connection, Define American presents us with facts and numbers, offering a powerful one-two punch.

Questions to Consider:

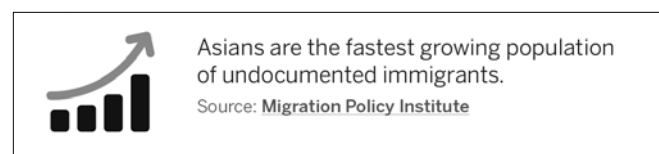
- What story do you want your audience to take away from the piece?
- Is showing data the best way to reach your audience with that story?

2. Is Your Story Instantly Clear?

When I worked at the Wall Street Journal, we created information graphics to visualize data for the most important stories of the day. Understanding that our audience would be browsing many stories across many pages, we asked ourselves: Can the reader get the gist of an infographic in just a few seconds? If it takes longer and the piece is more complex, the reader is asked to do more work and they may instead move on. We always tried to find the balance between punchy simplicity and nuanced rigor.



The lesson here? Show just enough data—not too much—to communicate your message. Sometimes a visual representation of a trend or pattern is effective and you don't even need data points. (Just be sure to have the data to back up your argument, and cite your data source.) For example, when Define American asserts, "Asians are the fastest growing population of undocumented immigrants" it displays a compact graphic of four bars with an arrow trending up. This is not an actual chart—it's an icon, and it gets the job done.



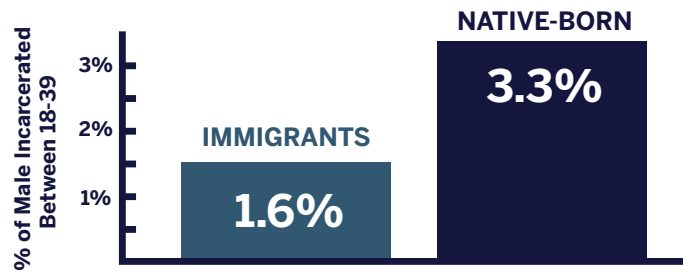
By contrast, the same headline could have been supported by a multi-line chart showing the immigration rates of multiple groups as absolute numbers or as annual percentage changes. This would present much more information and ask the reader to process more data. Some audiences may desire or even demand this type of detail and rigor (e.g., if you're talking to immigration experts or policy wonks). But for many audiences, complexity is not needed or appropriate—you can lead with a simple approach first and take it from there.

Key Questions:

- If you see the graphic for the first time, do you understand it in under five seconds?

Immigrants commit less crime than the native-born population.

Immigrants are less likely than the native-born to be behind bars.



Source: U.S. Census and American Community Survey

- What can you strip away to distill the data story to its barest essentials?

3. How Powerful Is Your “Aha” Moment?

Two values: 1.6 percent and 3.3 percent. If you were to see these percentages by themselves, you may think: those are pretty small numbers. They seem small in relation to the whole 100 percent. And there’s not much difference between them—a percentage point or two.

Now, show these values as weighty bars in a chart, and you see one is over twice as large as the other. Add a pithy headline, “Immigrants commit less crime than the native-born...” and these elements add up to an infographic that may tell you something new, shows it in a different way, and packs visual gravitas.

In sum, it delivers an unexpected “aha” moment. Visually, the heavy lifting is done by the bars which

#FactsMatter: Immigration Explained



No human being is illegal.



Phrases such as “illegal immigrant” and “illegal alien” replace complex legal circumstances with an assumption of guilt. They effectively criminalize the personhood of migrants, instead of describing the legality of their actions.



It is not a crime for an undocumented person to remain in the United States. “As a general rule, it is not a crime for a movable alien to remain in the United States.”

Source: Justice Anthony Kennedy, *Arizona v. United States*, 2012



It is a violation of federal immigration law to remain in the country without legal authorization, but this violation is punishable by civil penalties, not criminal.

Source: U.S.C. § 1325; US Code - Section 1325: Improper entry by alien

Immigration is not one size fits all.



Most undocumented immigrants cannot simply “get legal” and “be a citizen” by filling out paperwork or paying a fee.

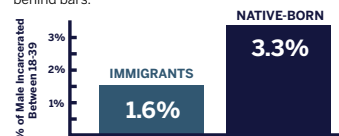
The right way to immigrate was at one time to simply show up. Processing at Ellis Island involved health inspections and naturalization.

- Many of our ancestors would not have qualified under today’s immigration laws.
- Many European immigrants benefited from “amnesty,” such as the 1929 Registry Act.

Source: American Immigration Council

Immigrants commit less crime than the native-born population.

Immigrants are less likely than the native-born to be behind bars.

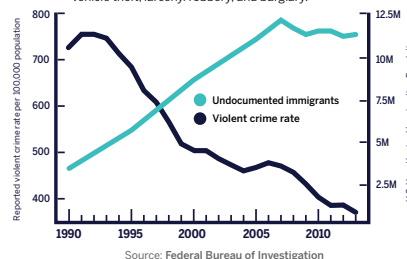


Source: U.S. Census and American Community Survey

Higher immigration is associated with lower crime rates

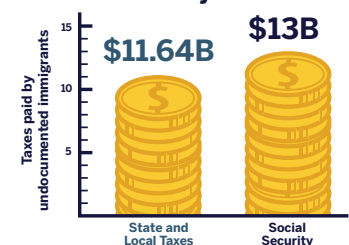
- Between 1990 and 2013, the foreign-born share of the U.S. population increased from 7.9 percent to 13.1 percent and the number of unauthorized immigrants increased from 3.5 million to 11.2 million.

- During the same period, the violent crime rate declined 48 percent—which included falling rates of aggravated assault, robbery, rape, and murder. The property crime rate fell 41 percent, including declining rates of motor vehicle theft, larceny/robbery, and burglary.



Source: Federal Bureau of Investigation

Annually, undocumented immigrants pay an estimated \$11.64 billion in state and local taxes, and pay \$13 billion to Social Security.



Source: Institute on Taxation and Economic Policy
Social Security Administration

Immigrants start businesses and grow the economy.



Immigrants are more likely to start businesses than native-born Americans.

Source: Kauffman Foundation



Immigration has an overall positive impact on long-run economic growth in the U.S.

Source: National Academies of Sciences, Engineering, and Medicine



If mass deportation were enacted, US GDP would drop by \$1.6 trillion.

Source: American Action Forum

A border wall would be an ineffective immigration restriction.



An estimated 40% of all undocumented immigrants were visa holders, which means they entered the country legally.

Source: Pew Hispanic Research Center



Asians are the fastest growing population of undocumented immigrants.

Source: Migration Policy Institute

Figure 1

show contrast that numbers alone do not do well. 1.6 vs. 100? 1.6 vs. 3.3? 1.6 is less than half 3.3? It will likely take a lot of experimentation and many iterations to get the visualization right. Finding the right visual benchmark for your data is an important step to show meaningful contrast and will help make your story more compelling.

Key Questions:

- What are you comparing against? Where is the contrast?
- What is the meaningful benchmark that puts it all in context?

4. How Do You Set Your Audience Up to Take the Next Step?

So, once your audience feels connected to the people you serve, understands your story clearly, has had a few thunderbolt “Aha” realizations, and is now even more excited than you... what do you want them to do next? Do you want them to share your story? Talk to an elected official or institution? Give your organization money? Volunteer their time and resources? Step up to be more active in the community?

Define American offers a few ways to engage. The easiest is to share on social media and re-broadcast posts (right now they’re promoting their film festival in North Carolina about undocumented immigrants). A #FactsMatter fact sheet (see Figure 1 on previous page) packages the top six myth-busting infographics in a format well-suited for printing and handing out at events. The website provides other statistics and data points that are easily tweetable.

In closing, data visualization can work well alongside other types of storytelling. Like the varied tools in a superhero’s utility belt, we can tell stories in myriad ways for myriad purposes. Data is one of those tools. When used in the right way, and in concert with compelling human stories, data can work to change minds and hearts and spur your supporters into action. ■

John has been a graphic designer specializing in information and data visualization for over 15 years. He currently serves as program director for financial health at IDEO.org, a nonprofit design and innovation firm in San Francisco.



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*The following article is a follow up to the Social Enterprise 101: A Sustainable Fundraising Tool workshop presented at the 2016 GIFT Conference by Julie Voyles of The Colorado Nonprofit Social Enterprise Exchange and Sonya Ulibarri, President and CEO of Girls Inc. of Metro Denver. The concepts presented are based largely on **Getting Started with Social Enterprise**, a presentation created by Caryn Capriccioso and Rick Zwetsch of interSector Partners L3c, and used with permission by The Colorado Nonprofit Social Enterprise Exchange.*



MJ and Yesenia, two founding Bold Baristas of Girls Inc. of Metro Denver's Strong, Smart, & Bold Beans social enterprise.

A Case for Social Enterprise

By Julie Voyles & Sonya Ulibarri

THE NONPROFIT SECTOR HAS A LONG HISTORY of engaging in social enterprise activities; however, in recent years nonprofit fundraisers have renewed focus on utilizing social enterprise as a tool for sustainability and social change in both the U.S. and around the globe. This is due to several factors:

1. A need for nonprofits to diversify revenue sources and generate income;
2. Blurring of lines between nonprofit and for-profits, including the emergence of benefit corporations and low-profit limited liability companies (LC3s); and,
3. Changes in philanthropy and traditional grant making strategies.

Social Enterprise Defined

There are a number of terms that are used frequently (sometimes interchangeably) when discussing social enterprise, such as earned income, fee for service, triple bottom line, etc.

So what is a social enterprise? The Social Enterprise Alliance defines social enterprises as, "Businesses whose primary purpose is the common good. They use the methods and disciplines of business and the power of the marketplace to advance their social, environmental and human justice agendas." Social enterprises can be distinguished from other types of businesses, nonprofits and government agencies through three primary characteristics:

1. Directly address a social need;
2. Utilize a commercial activity to drive revenue; and,
3. The common good is their primary purpose.

Social Enterprise Profiles

Bayaud Enterprises // Denver, CO

Bayaud Enterprises was created in 1969 to serve the disabled population of Denver. Founders saw a need to provide real work experiences for individuals who may not be able to earn a livable wage on their own. As Bayaud Enterprises has grown over the years, it has provided services for more than 8,000 individuals, and has expanded its services to serve homeless or low-income individuals and families. bayaudenterprises.org

Central City Concern // Portland Oregon

Central City Concern meets its mission through innovative outcome-based strategies that support personal and community transformation in the areas of housing, healthcare, employment, and peer support. Through the operation of four social enterprises, including Central City Bed® and Central City Coffee®, the organization utilizes business models to generate income that is reinvested into new programs and program improvements. centralcityconcern.org

DC Central Kitchen // Washington D.C.

For more than 25 years, DC Central Kitchen has pioneered a new model of using food as a tool to change lives. They provide nutritious meals to neighbors in need, equip unemployed men and women to begin culinary careers, and engineer successful social enterprises that advance their mission while creating good jobs for the people they serve. Through job training, healthy food distribution, and local small business partnerships, DC Central Kitchen offers path-breaking solutions to poverty, hunger, and poor health. dccentralkitchen.org

Homeboy Industries // Los Angeles, CA

Each year over 10,000 former gang members from across Los Angeles come through Homeboy Industries' doors in an effort to make a positive change. They are welcomed into a community of mutual kinship, love, and a wide variety of services ranging from tattoo removal to anger management and parenting classes. Homeboy Industries operates multiple social enterprises that include a bakery and café, farmers market, grocery product line, silk-screening, and recycling. Full-time employment is offered to more than 200 men and women at a time through an 18-month program that helps them re-identify who they are in the world and offers job training so they can move on from Homeboy Industries. homeboyindustries.org

For social justice organizations, social enterprise can be a powerful vehicle for both a nonprofit and its broader constituency. In addition to providing the potential to generate revenue that is sustainable, unrestricted and autonomous, social enterprises can advance community wealth-building, constituent leadership, and economic justice issues. Furthermore, social enterprise can challenge the traditional charity-model mindset that low-income communities, communities of color, and other marginalized groups are only “recipients” or “consumers” as opposed to “producers” or “creators” of anything valuable to our larger society.

SOCIAL ENTERPRISE CAN CHALLENGE THE TRADITIONAL CHARITY-MODEL MINDSET THAT LOW-INCOME COMMUNITIES, COMMUNITIES OF COLOR, AND OTHER MARGINALIZED GROUPS ARE ONLY “RECIPIENTS” OR “CONSUMERS” AS OPPOSED TO “PRODUCERS” OR “CREATORS” OF ANYTHING VALUABLE TO OUR LARGER SOCIETY.

What Social Enterprise Can Offer

As much as most nonprofit leaders want to hear that starting a social enterprise will solve all of their fundraising struggles, the reality is that starting a business, even a socially purposed business, is never easy. It can take years before the business generates enough revenue to earn a profit. With clear expectations about why your organization is pursuing a social enterprise and a deliberate, systematic process to launch a social enterprise, however, nonprofits can develop a sustainable and renewable source of unrestricted revenue.

In addition to diversifying revenue streams, social enterprises yield many other benefits. The Colorado Nonprofit Social Enterprise Exchange (The Exchange) conducts a cohort-based social enterprise development program in which nonprofits participate in a nine-month program that guides them through a process of identifying potential business ideas, completing a feasibility study, writing a business plan and then developing a pitch, which is then presented to investors, funders and supporters at graduation. To date, The Exchange has graduated 21 nonprofits from three cohorts and we have heard from graduates about additional outcomes, beyond the business itself, that have resulted from learning about and launching a social enterprise.

As part of the Exchange, cohort members learn skills such as evaluating the feasibility of starting a new program, including its financial feasibility, conducting market research, and managing budgets, cash flow and personnel. Graduates state they are now more creative and more entrepreneurial in their thinking and how they view their work. Where once participants saw only barriers, upon program completion they see that social enterprise can solve previously unsolvable problems.

A graduate of The Exchange's cohort program, Girls Inc. of Metro Denver, launched a coffee-based social enterprise in 2015 called Bold Beans that provides teen girls with paid year-round jobs, hands-on leadership opportunities, and exposure to business development and entrepreneurial skills. Bold Beans has been a

DOING WELL AND DOING GOOD ARE NO LONGER MUTUALLY EXCLUSIVE.

powerful tool for advancing the organization's impact and expanding programming for high school girls. In just two years, the business has employed 20 girls and distributed over \$50,000 in wages.

Another important benefit of social enterprise is the exposure of the nonprofit brand to new audiences. Selling a product or providing a service through a social enterprise will reach people that may not otherwise be exposed to the nonprofit. Another graduate of The Exchange, Planned Parenthood of the Rocky Mountains (PPRM), launched Vibrant (bevibrant.com), an e-commerce business that provides high quality, body safe sex toys and education from which 100 percent of Vibrant's profits go to PPRM. Vibrant now reaches a new audience that may not otherwise access PPRM's services, but is willing to support the work through consumer purchases.

By nature, social enterprise is a solution to social and economic injustice. Kevin Lynch, former President and CEO for the Social Enterprise Alliance, wrote an article published in the Huffington Post¹ in which he asserts that social enterprise is a counterpoint to privileged economy because it places the common good above economic gain. Lynch further offers that social enterprise is a pivot toward economic justice not only because of the emphasis on the common good but also because it can spread wealth outside of the privileged class and opens up economic opportunity for those without access to the privileged economy.

¹ huffingtonpost.com/kevin-lynch/social-enterprise-and-the_b_5646091.html

Why Now

Social enterprise is not a new concept, but nonprofit interest and attention toward social enterprise endeavors is growing significantly, and the reasons for the growing interest are varied. When The Exchange first launched in 2012, nonprofits and the communities they served were still reeling from the economic recession both in terms of the tremendous increase in demand for services but also the decrease in charitable giving. Nonprofits were tasked to do more with less and many were looking to social enterprise to both provide a new source of revenue and offer job opportunities for the people they served. While the economy has, to a certain extent, recovered, nonprofits today are faced with a new economic challenge in today's political era.

The Trump Administration is looking to repeal and replace the Affordable Care Act, and the proposed replacement will result in millions of Americans losing their health care. The economic burden on these individuals will, in turn, result in more demand from nonprofits to provide a safety net. At the same time, the Trump Administration wants to cut domestic spending, which will result in cuts to federal programs that provide funding for services that support low-income communities, and programs that support women, immigrants and refugees, and LGBT individuals. As we know, the need from these communities for these programs won't disappear, rather the burden will fall on nonprofits to fill in the gaps without the support of federal dollars.

Social enterprise is also on the rise because of a new generation of philanthropists who value impact first, regardless if that impact is coming from a for-profit business that provides clean water technology in third world countries, healthy and nutritious food for schools, or a nonprofit that provides affordable solar energy to low-income communities. The millennial generation values doing good as much as doing well and they are looking for work that has a positive impact on society and the environment. This generation also pays attention to the products they buy to make sure the product, and the product's company, has a positive impact on communities and the environment.²

The line between for-profit and nonprofit is fading and greater attention to the social and environmental good that a business can produce is growing quickly. Companies like Patagonia, Newman's Own and Seventh Generation are also leaders in showing how businesses can be a force for good in the areas of social responsibility and environmentalism. Doing well and doing good are no longer mutually exclusive.

² See Next Gen Donors: Shaping the Future of Philanthropy, grantcraft.org; Next Gen Donors: Respecting Legacy, Revolutionizing Philanthropy, nextgendonors.org; 2013 Millennial Impact Report, themillennialimpact.com; and 15 Economic Facts About Millennials, obamawhitehouse.archives.gov.

Success Indicators

While anyone can start a business and any nonprofit can start a social enterprise, interSector Partners has identified key characteristics that are indicators of success and readiness to consider as you pursue social enterprise. One of the most important characteristics of a nonprofit's likelihood of success is having an entrepreneurial and innovative culture. Given the challenges most nonprofits face operating on shoestring budgets, this entrepreneurial mindset is often part of nonprofit culture. But as often, nonprofits are limited by a scarcity mentality. Nonprofits with successful social enterprises build and maintain cultures that are open to and embrace new ideas and ways of operating, mitigate risk adversity among their leadership, and make decisions quickly to capitalize on opportunities.

Other success indicators for nonprofits include being comfortable thinking from a business framework and using the concepts and language of business, and having access to people with business experience. Finally, nonprofits with successful social enterprises have champions, mentors and a loyal customer base that is willing and ready to further support the nonprofit by purchasing a new product or service.

Challenges

Building and operating a social enterprise comes with challenges as well as opportunities that are specific to nonprofits. Many nonprofits and nonprofit leaders do not have business experience and while some nonprofit board members are business owners, this expertise and perspective are not encouraged in their role as a nonprofit board member. One of the most significant challenges is also the cultural conflicts that arise as the result of a new focus on social enterprise. Once a nonprofit moves in the direction of social enterprise, decisions must subsequently be based on not just what will be best for the nonprofit's mission, but also what will ensure that the business thrives. Exchange cohort graduates talk about the necessity of cultivating buy-in from staff, board, volunteers and donors before launching a social enterprise, because what they have found is that when faced with the reality of operating a social enterprise and balancing the need for mission and money, they often encounter resistance from their nonprofit community. Intentional cultivation of support for the social enterprise is key and includes constant reminders that the purpose of the social enterprise is to serve the mission of the organization.

It is very important to work closely with funders and major donors to help them understand why social enterprise is important for the organization and how it will serve the mission. These relationships must be cultivated to prevent funders and donors from exiting because they either disagree with nonprofits run-

Unrelated Business Income & Income Tax

For most organizations, an activity is an unrelated business (and subject to unrelated business income tax) if it meets three requirements:

It is a trade or business,
It is regularly carried on, and
It is not substantially related to furthering the exempt purpose of the organization.

ning a business or believe that the nonprofit no longer needs their support. Raising startup funding can also be a challenge, as many investors and funders are hesitant to support start up businesses because of the risk that the business will fail. Finding funders and investors who are comfortable with risk, support the mission of the nonprofit, and are willing to work as partners can help mitigate this challenge. Finally, nonprofits must understand and consider unrelated business income and unrelated business income tax (see side bar for definitions), which in and of itself is not good or bad.

Social Enterprise Development

The one guarantee in life, in business, and in the nonprofit sector is change. Nonprofits that will survive and thrive are looking ahead to anticipate change and are willing to embrace new and different ways of operating. Social enterprise is one option. It may not be appropriate for every nonprofit and every situation, but it can be a solution if approached with the right tools and resources to succeed. We believe one of the best ways to mitigate risk is to follow a systematic process illustrated in the following graphic:



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Each step requires engaging staff, board members and partners, and the willingness to look critically at potential ideas and pay attention to what the research and feasibility study is telling you. It is human nature to believe you have the next great busi-

ness idea, but an idea must be backed up with facts that indicate there is a quantifiable customer base that is willing to pay for your new business product or service.

To Close

Social enterprise is not the Holy Grail of nonprofit fundraising, but it is one tool that can provide unrestricted, renewable revenue to support a nonprofit's mission and further its impact. Profit doesn't have to be a dirty word, and social enterprises in particular can be an important strategy in disrupting economies of privilege and advancing social justice work. To be successful, nonprofits need to view social enterprise as a long-term investment that requires thoughtful and thorough planning to launch and sustain. ■

Julie Voyles has worked in the nonprofit and philanthropic sectors since 1987 and in 2011 Julie launched her nonprofit and foundation consulting business. In 2012, Julie co-founded the Colorado Nonprofit Social Enterprise Exchange, which trains nonprofits to finance, launch, and operate social enterprises.

Sonya Ulibarri is the president & CEO of Girls Inc. of Metro Denver, an organization that inspires over 2,500 girls each year to be strong, smart and bold. She has extensive experience in the areas of nonprofit management, fundraising, and social enterprise and previously served as the executive director of the Grassroots Institute for Fundraising Training.

Support & Resources

The resources available to nonprofits to explore and develop social enterprises are growing. Below are several that we suggest:

Resources to assess organizational readiness, how to strategically consider social enterprise and a list of books and websites to further explore social enterprise:

The Social Enterprise Exchange (sustainablenonprofits.org)
interSector Partners (intersector13c.com)

Profiles of social enterprises around the country, and information about a national Social Enterprise Summit that is planned for September 18-20 in Los Angeles, California:

The Social Enterprise Alliance (socialenterprise.us)

Research on the field and impact of social enterprise:
The Roberts Enterprise Development Fund (redf.org)

Research and resources on best practices as well as a start up kit for social enterprise:

REDF's web platform (redfworkshop.org)



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— Jan Masaoka, CEO, California
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