

Grassroots Fundraising Journal

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A PUBLICATION OF



CLOSING/CALL TO ACTION

PLENARY "Decolonizing Wealth: A Call to Mutual Healing and Thriving"

Sunday, July 29 | 11:30 a.m. - 12:45 p.m. | Student Center East

Edgar Villanueva
Author of Decolonizing Wealth
Schott Foundation

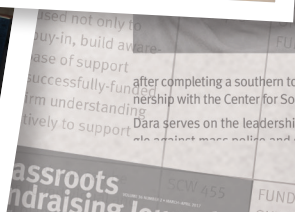
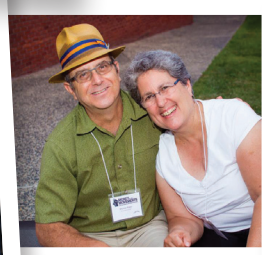


Xochitl Bervera, Director of Racial Justice Action Center (RIAC), Atlanta

Xochitl Bervera is a queer Chicana/Latina activist and teacher/trainer. She is currently the Director of the Racial Justice Action Center which builds the grassroots capacity of marginalized communities to organize and advocate for economic, social, and environmental justice.



A Social Justice Fundraising Program



In the spirit of doing good work, I've been thinking about the importance of media planning and history in a responsible and intends to blend all these

Betancourt, Alexandria Jonas

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Grassroots Fundraising Journal

PROCERY

I AM AN AMERICAN

FUNDRAISING SKILLS, STRATEGIES, SYSTEMS

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A PUBLICATION OF



**Grassroots Institute
for Fundraising Training**

The *Grassroots Fundraising Journal* is a bimonthly publication of GIFT.

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Until we meet again...

FOURTEEN YEARS AGO, I walked into a job interview with Stephanie Roth for the *Journal's* part-time program associate position. I had interacted with Stephanie, Kim and Nan over the years I worked downstairs from them at the Applied Research Center (now RaceForward), so I wasn't super nervous but I did want to bring my "A" game.

I remember the interview being fairly informal—going over responsibilities, hours, pay, etc. I left feeling excited to join a team committed to providing practical fundraising resources to grassroots groups, and quickly accepted when I was offered the job.

There have been many changes at GIFT and the *Journal* since 2004—in our programming, staff, board, and organizational structure—but the one constant has been the collective brilliance, strength and generosity of the GIFT community. I am leaving GIFT full of gratitude for all of the smart, talented and compassionate people I've had the opportunity to collaborate with over the years, and am looking forward to what comes next for the organization.

There are a few groups of people I want to acknowledge specifically. First, our Editorial Board, without whom this publication would not be possible. Our quarterly calls together were always so fun and inspiring, and I will certainly miss being on them with you. To my GIFT staff teammates, Nan and Veronica: Thank you for holding it down through multiple transitions with grace and humor, and for bringing your whole selves to this work. To say I will miss working with you is an understatement. And to GIFT board members past and present, who have volunteered countless hours out of deep love for GIFT and its mission, your support has sustained this organization and the movements it serves. Thank you. Last, I want to appreciate some behind the scenes folks: designers Cici Kinsman and Chris Martin (formerly with ColorLines magazine); copy editors Myn Adess, Merula Fertado, Sonny Singh, and Chela Delgado; the print production teams at Inkworks and Community Printers; and Martha McCambridge at CompleteMail, who makes sure your print issue arrives on time, every time. Team work makes the dream work!

Andy Robinson opens this issue of the *Journal* with a piece that examines practical and ethical considerations for groups experiencing rapid outpouring of support. *GFJ* Editorial Board Member John Won follows with a useful and fun infographic to help us navigate the world of crowdfunding, along with a helpful breakdown of the pros and cons of different platforms. Next, Zach Shefska encourages us to dive into our fundraising data, including some simple metrics that can help inform our strategies going forward. We round out the issue with an interview by Stephanie Roth of yours truly, reflecting on my 14-year tenure with the organization.

I am writing this as many of you are making the journey to Atlanta for GIFT's 7th biennial Money for Our Movements: A Social Justice Fundraising Conference, the first one I won't be attending. To mark this transition, I asked our designer Chris Martin to create a photo collage that captures some of my favorite people and memories from the first six conferences. I know that this year's gathering will be equally amazing as in previous years, and please know that I'm with you all in spirit.

Jennifer



Opportunistic Fundraising

The good, the Bad, and the Confusing

By Andy Robinson

GIVING USA JUST RELEASED THEIR FUNDRAISING DATA for 2017. Once again, a record amount—\$410 billion—dollars was donated to nonprofits, up from \$390 billion in 2016.

Nearly every category of nonprofit, ranging from arts and social service to religion and the environment, saw annual fundraising increases ranging from 3 to 9 percent.

A great moment for grassroots fundraising

This growth is, in part, a response to the last election and the political climate that followed. In 2016, says Dr. Patrick M. Rooney of Indiana University's Lilly Family School of Philanthropy, "We saw something of a democratization of philanthropy," with the greatest growth from small and mid-sized donations. From my perspective, that trend continues.

You've probably read about the remarkable fundraising success of national nonprofits like Planned Parenthood and the ACLU. We've also heard about grassroots groups working on a variety of progressive issues—immigrant rights, civil liberties, climate justice, gun violence, and so on—enjoying increased support, some of it unsolicited.

For social justice fundraisers, the message is clear. This is an opportune moment broaden your base and raise more money—but the moment comes with both risks and rewards.

Opportunistic can be a good thing

A colleague recently shared a story. A local immigrant rights coalition didn't know what to do with the surge of donations they received in response to the Trump travel bans. (Note to everyone: if

GIVING EMPOWERS PEOPLE. THESE DONORS GAVE, AND GAVE VOLUNTARILY, BECAUSE THEY WANTED TO TAKE ACTION.

unexpected income is a problem, it qualifies as a “good problem.”)

These donations generated a lively conversation. At one level, the debate was tactical: Spend it now, or save it for a rainy day? Clearly, there are legitimate arguments on both sides, though I appreciated my colleague’s comment: “Hey, it’s pouring now!”

However, the group’s response was also psychological. For some organizers, it felt “dirty” or “too opportunistic” to take advantage of the current political crisis to raise additional money.

Sadly, they neglected to see the moment from the donor’s perspective. Giving empowers people. These donors gave, and gave voluntarily, because they wanted to take action. They trusted the recipient organization to make good use of the money.

For the record, the word opportunistic has both a positive and negative spin. Among the dictionary definitions:

- Taking advantage of opportunities as they arise.
- Feeding on whatever food is available.

It saddens me that some social justice activists feel tainted—or perhaps unworthy—of the praise and affirmation they receive through unsolicited, voluntary gifts. I want to whisper in their ears, “Enjoy the praise! Build your base! Use the money!”

How to respond to a windfall

Here’s an inspiring story from Texas—one that generated headlines across all types of media.

RAICES, the Refugee and Immigration Center for Education and Legal Services, is deeply engaged with efforts to reunite refugee and immigrant families on the U.S.-Mexico border.

As of early July 2018, the organization has benefited from more than \$20 million in online donations, the most successful Facebook fundraising campaign ever. As reported by *Slate* and *Nonprofit Quarterly*, much of this money will be used to set up a permanent bond fund to bail out detainees.

As the largest immigration legal services organization in Texas, with an annual income of about \$7 million, RAICES has the financial, management and fundraising systems to handle this kind of windfall while adapting on the fly. Among their strategies (with thanks to Tina Cincotti of *Funding Change Consulting*, who shared her experience as a donor):

- Prompt, personalized thank you messages, including a brief video.
- Regular updates to supporters on multiple platforms, including webinars addressing how they’re using the money and how volunteers can engage with the work.
- Describing the on-the-ground impact of these donations.
- Messages that emphasize transparency, trust, and humility: “You have trusted us...Our solemn promise to you is that we will earn that trust by being transparent with what we’re doing, how we’re spending the dollars, and who we are serving.”

“The staff made quick use of technology to organize Facebook Live updates on the fundraising campaign and its response to rapidly changing legal news,” wrote Anna Berry in NPQ. “When the RAICES website crashed due to the traffic, there were also frequent updates, and a video highlighting reunited families and the organization’s diverse staff was pinned to the top of its Twitter feed.”

Barbara Peña, assistant director of outreach, asked for patience as she tried to sum up the experience of winning the nonprofit lottery. As quoted in *Nonprofit Quarterly*,

“We continue to see those numbers climb, and it is really ... a special moment,” she said. “It’s a testament to not just the importance of the work...we [also] know that people who are new to immigration issues are taking note of the climate that we find ourselves working in.”

Opportunistic can be disorganized and confusing

In December 2017, the Thomas Fire burned 440 square miles of Southern California, making it the largest wildfire in state history. It destroyed more than one thousand structures: homes, businesses, schools, and several nonprofit facilities. A subsequent landslide—the technical term is “debris flow”—added to the destruction and dislocation.

Crowdfunding technology made it easy—too easy—for people to jump in and raise money themselves. The fires and mudslides inspired an increase in individual fundraising campaigns, says Geoff Green of the Santa Barbara City College Foundation.

THERE ARE MOMENTS—ESPECIALLY MOMENTS OF CRISIS—WHERE NONPROFITS CAN RAISE MORE MONEY COLLECTIVELY THAN THEY CAN INDIVIDUALLY.

“For small, immediate needs,” says Green, “GoFundMe and other crowdfunding platforms are useful tools. Problems arise when people reflexively set one up because it’s easy, but without doing the necessary homework.” Among the things that people don’t understand, he says:

- It’s taxable personal income
- The fee structure—crowdfunding platforms keep a percentage of revenues
- It takes up to two months before the money is transferred
- You need to coordinate, in advance, with the recipient

Worst of all, many people forget that existing, well-established nonprofits are already doing disaster relief work with a high level of accountability.

What’s the solution?

According to Ventura-based Jerusha Schmalzel of Blackbaud, “I encourage nonprofits to take the initiative in deploying peer-to-peer fundraising strategies proactively. If and when disaster strikes, they can use these channels to encourage donors to give through the organization,” rather than creating their own crowdfunding campaigns.

When opportunism looks like exploitation

In recent years, the Dakota Access Pipeline protests at the Standing Rock Sioux Nation dominated the news, especially in progressive circles. People traveled from across the country and around the world to participate in the encampment, support Indigenous rights, and resist fossil fuel infrastructure.

In April, High Country News published an article by Paige Blankenbuehler titled, “Cashing in on Standing Rock.” It’s a case study on how people—well-meaning or otherwise—can jump on a cause-du-jour and use it as an opportunity to generate LOTS of money with little accountability.

“In the course of a nine-month investigation,” she wrote, “High Country News compiled publicly available data from GoFund-

Me and examined nearly 250 campaigns, each of which raised at least \$3,000 for causes related to the Dakota Access Pipeline. Altogether, more than 138,000 people donated nearly \$8 million. Many of those campaigns accepted money without necessarily offering accountability, either to their donors or to the causes they claimed to represent.”

Among the crowdfunding opportunities: Send a chiropractor to Standing Rock (never happened) and fund the “Bunk Bus”—a service known in music festival circles for providing kits to test the authenticity and quality of illicit substances.”

As contributing editor Graham Lee Brewer noted in an accompanying op-ed, “While I was reporting there in 2016, there was certainly a sense from Indigenous activists that the stand against the Dakota Access Pipeline was being co-opted or used simply as an opportunity to party, at least in part. Our investigation does little, unfortunately, to disprove this.”

The article focuses on Veterans Stand for Standing Rock, which raised \$1.4 million to recruit and support military veterans who wanted to travel to the encampment. The man who created Veterans Stand, Brewer adds, had “No experience starting a nonprofit, organizing a large-scale demonstration, or creating an accountable process for reimbursement and distribution of funds.” As described in the article, the process of reimbursing veterans for travel expenses was chaotic and disorganized, with virtually no paper trail.

According to the magazine, “There is no clear explanation for what happened” to the money, “or who should be responsible for how it was spent.” Some was disbursed to veterans. Some was used to pay personal expenses of the leadership, and some simply disappeared. Much of it remains unaccounted for today.

Veterans Stand no longer exists.

Shared fundraising: Creating your own opportunity

How can you be more opportunistic, in the best sense of the word?

Consider joining forces with peers. There are moments – espe-

cially moments of crisis – where nonprofits can raise more money collectively than they can individually.

Potential shared strategies include joint grant proposals; fundraising events that benefit multiple organizations; and community “giving days.” Indeed, there are major donors – consider the name-brand funders in your community – who would be impressed and delighted if multiple nonprofits approached them as a team to present a joint project, rather than soliciting them individually.

NONPROFITS ARE BY NATURE RESILIENT, AND THE PEOPLE WHO RUN THEM DOUBLY SO.

Shared fundraising can also open the door to deeper conversations about coordination and collaboration. It’s a form of movement-building. When a diverse mix of groups actively raise money together, that’s one indicator of a viable, vigorous social movement.

Never waste a crisis

Over the years, I’ve provided training in several communities affected by natural disasters and other crises. I often begin these workshops with two questions:

What’s challenging now? What are the opportunities now?

As we grind through the Trump era, I’ve been asking the same questions. I’m always impressed at how people use these challenging moments to explore ways to do their work more efficiently and effectively.

Nonprofits are by nature resilient, and the people who run them doubly so. If and when you face a crisis – natural disaster, political crisis, an unexpected change in leadership – consider it an opportunity for change and respond accordingly. Remember: as you sort out the details, keep your donors in the loop. ■

Andy Robinson has been raising money since 1980. To learn more about his work as a consultant, trainer, and facilitator, visit andyrobinsononline.com and trainyourboard.com.

Visit the Journal Archive to read more articles on the ethics of fundraising, crowdfunding, and data analytics.

grassrootsfundraising.org/archive
\$3 each or free if you’re a subscriber

Opportunistic Fundraising by Kim Klein

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Activating the Social Media Grassroots: Lessons in Cultivating Online Communities by Cayden Mak

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The Perennial Question of Clean and Dirty Money by Kim Klein

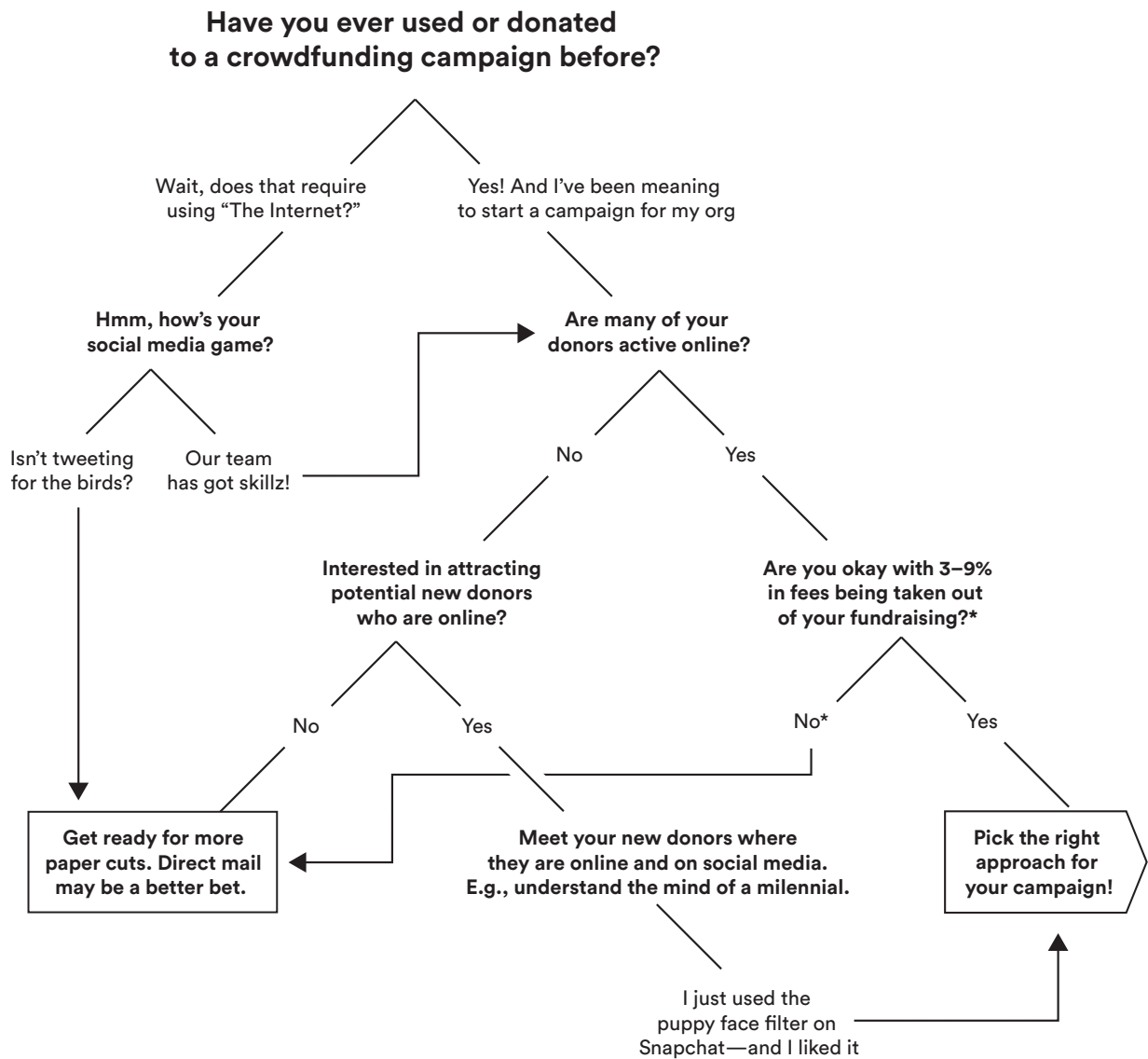
Our Multipronged Approach to Crowdfunding: Melding the Old & the New by Noelle Hanrahan & Lyla Denburg

Data, Donor Retention, and the Secret to Fundraising Success by Heather Yandow

Is crowdfunding right for you?

By John Won

If you're a nonprofit considering a crowdfunding campaign to attract more online donations, there are many options available and many factors to consider before you make your decision.



*There's a range of fee structures, depending on the platform and type of fundraising you're conducting. Many platforms reduce rates for certified nonprofit causes, for example, Facebook offers 0% platform fees for nonprofits, but not for individuals/personal causes, and Facebook does not share donor data.

How do you pick the right crowdfunding platform?

Prioritize your goal: is it to raise money rapidly? reach an entirely new donor segment? raise 2–3x more money? Once you clarify this—and know what you’re signing up for—your options will narrow.

What does success look like for your campaign?

	SPEED OF RAISE We have an emergency. We need this money ... like yesterday.	ACQUISITION OF DONORS We want to reach new donors, e.g., who don't respond to traditional fundraising.	SIZE OF RAISE We need a lot of money, e.g., for a startup, legal case, or capital campaign.
Why might donors listen?	Keep your pitch simple and direct. You may be appealing to folx that will support folx in crisis, so tell a human story and/or one about impact.	Simplify your "why." Avoid (or break down) the jargon. Investing in a high-quality pitch video can help tell a compact, compelling story with broad appeal.	Prospects in this category may have a different mindset: they may look for multiplying factors that maximize impact and/or return on investment.
What might get them to consider giving?	Personal appeals go a long way. It can help to go through trusted influencers, as some donors may suspect fraud on social media and folx that cry wolf. Building trust and authenticity are key. And explain how money will help create impact.	Understand what your prospects care about and lift up where it aligns with your cause. For donors who are far removed from the impact you're creating, sending artifacts as donation rewards will help them feel connected. Every campaign update is a teaching moment.	Getting an angel donor or investor early on may persuade other donors come onboard. The bigger the name/match, the better. Be prepared for donors to check your math to prove the rigor of your model and robustness of your approach.
How should they be engaged?	You're likely in a rush, so cover the basics: articulate a simple but compelling "why," amplify on social media, and follow up with donors to share the the impact they helped you achieve, even if it's a short personal thanks.	If these new donors prove to be valuable, consider investing in this as the start of a long relationship. I.e., if they're on social media, you may shift or add resources to maintain engagement there over the long term, so your next ask will be primed and amplified further.	Show confidence and expertise. A pitch video can tell the details of a complex cause succinctly and with legitimacy. If the fundraising journey is a long one, time updates strategically to show progress so folx feel their money is invested in the right place.
How long?	7–14 days, or however long you need	30–60 days, with pre-work for messaging, e.g., a pitch video	30–60 days, with pre-work to line up angel investors
CONSIDER THESE PLATFORMS TO START <i>but not an exhaustive list</i>	Facebook for the broadest reach via the social network plus no platform fees* BUT you don't get donors' data GoFundMe for no platform fees for personal causes*	Kickstarter and Indiegogo for the largest rewards-based crowdfunding platforms with tutorials for newbies, helpful tools, and active communities of followers and donors	CauseMatch for challenge-grant model with VIP donors CrowdJustice for equity funding for legal cases AngelList for startups where investors take equity stakes

*Even when platform fees are waived, the fundraiser or donors may still be asked to cover payment-processing fees. Platforms' conditions change regularly, so read the fine print!

John Won has been a graphic designer specializing in information and data visualization for over 16 years.



Data Analytics for Grassroots Groups

Organizations of all sizes can benefit from analyzing data. Here's what your small shop should be doing.

By Zach Shefska

GOOGLE SEARCH “BIG DATA,” and you should expect big results.

Do you see what I see? 403,000,000 possible links to click on.

Wow.

“Data” as a concept is like a black box. Where do you even begin? As nonprofit professionals we’re trained and equipped with tools that help us build relationships, establish compelling cases for support, and ultimately further our organization’s mission—we’re not data scientists.

But more frequently than not we’re bombarded with marketing that suggests we should be. “Your for-profit peers are analyzing customer data to improve ROI, you should too!” This invitation to more effectively use data in the service of our organizational missions is appealing, but is, difficult to execute well.

Contemplating data from the perspective of a small grassroots nonprofit is even more challenging. If you’re reading this, you likely wear many hats at your organization. Fundraising may not even be one of your primary responsibilities, instead it might be something you simply tend to from time to time. How then (and

more important, why) should you begin the process of learning a foreign concept like “data analytics”? Justifying this answer with, “I heard about it on a webinar” is not good enough. Your time is too valuable to try new things on a whim.

Instead of focusing on the abstract, let’s focus on reality. Data doesn’t need to be intimidating, and understanding your organization’s treasure trove of information can have a legitimate and positive impact on your bottom line. Let’s simplify the discussion around data, identify a handful of areas where it can truly be meaningful for us, and cut out the rest of the noise.

Why data should inform our fundraising strategies

Third Space Studio, a niche consulting firm run by Meredith Emmett and Heather Yandow produces some of the most compelling small nonprofit research in our sector. Their annual Individual Donor Benchmark Project¹ provides incredibly neces-

¹ thirdspacestudio.com/idbproject/

sary insight into the realities and trends seen amongst smaller nonprofit organizations.

Large annual research reports such as the Giving USA annual report get a lot of attention, but their results aren't particularly "actionable" or accurate for small, more grassroots organizations. The Individual Donor Benchmark Project fills in this void.

One of the most compelling outcomes from the research is the conclusion that having a fundraising plan is a primary indicator for fundraising success.

Without a plan, the research suggests, an organization will not achieve as much as they were capable of.

This forces us to address the question, "How do you come up with a fundraising plan?" You could "use your gut," or "do what we've always done," but neither of those techniques are reliable long term solutions. Data can inform the planning and strategy process, leading to a more impactful fundraising vision.

Measuring certain metrics, understanding historical trends in donor behavior, and entering the realm of descriptive analytics can help an organization determine what strategy to take. Once strategy is determined, the staff can implement more specific tactics; and once our tactics have been put into place we can measure their effectiveness by looking back at the metrics that guided our initial strategic decision. A process of using data as part of the decision making process takes us away from relying on gut feelings and the status quo, and instead forces us to develop a feedback loop in which our activities are informed and measured by numbers.

What data should I measure?

If a strategic and data-driven fundraising plan is driven by data, the question becomes "what data?", or more specifically, "which metrics should I measure?" In order to inform your fundraising strategy there are a few key metrics you'll want to know. I've written extensively² in the past about a variety of meaningful metrics and why you should measure them, but it is important to keep in mind that there is no "one-size-fits-all" solution. Below we'll review two commonly measured and useful fundraising metrics — donor retention rate and donor lifetime value.

Donor retention rate

Simply put, donor retention rate is the number of donors you keep with respect to the number you had at the start of a given period of time. This metric does not count new donors, but it does include upgraded (donors that renew and increase their cumulative giving) and downgraded donors (those that renew and decrease their cumulative giving).

To calculate donor retention rate you'll take all retained donors in a year and divide that by all donors from the prior year. This number, multiplied by 100, is your donor retention rate.

This equation is pretty simple, and you may have even seen it covered on other fundraising publications and websites:

$$\text{Donor Retention Rate} = (\text{Retained Donors in 2017} \div \text{All Donors in 2016}) \times 100$$

You can think of retention rate as a measure of how well your organization is developing relationships with its constituents. In

YOU CAN THINK OF RETENTION RATE AS A MEASURE OF HOW WELL YOUR ORGANIZATION IS DEVELOPING RELATIONSHIPS WITH ITS CONSTITUENTS.

general, the higher the rate at which donors maintain their year-over-year giving, the better your organization is doing building and cultivating meaningful relationships with those supporters (though of course other factors are always at play).

It's important to know and measure your overall donor retention rate, but it is even more important to keep track of segmented retention rates. For example, how well is your organization retaining first-time donors? (This would be the rate at which first-time donors from last year are being retained in the next year.) What about repeat donors? At what rate are retained donors from last year being retained again this year?

Having insight into your organization's donor retention rate, and its related segmented retention rates, will have major implications for strategic decisions moving forward.

For example, an organization I volunteer with analyzed their donor retention rates after spending thousands of dollars to increase donor acquisition. We calculated their first-time donor retention rate for the last three years and it was incredibly helpful to distinguish between a high first-time donor retention rate of 22 percent in 2016 (before spending thousands on donor acquisition tactics) compared to a significantly lower retention rate of 8 percent in 2017 (after investing in donor acquisition tactics). With access to this information, organizations can begin to identify what in prior years had made their donor retention so successful, and recreate those actions in the future.

² fundraisingreportcard.com/data-driven-fundraiser/

The data also guides organizations around pitfalls to avoid. A lot of the new donors acquired in 2016 didn't renew in 2017. Why is this important? It highlights the long-term negative impact that investing in acquisition (without a retention strategy) can have. Unfortunately for this organization they were paying the price of not being prepared with a 12-month welcome series, which could have kept their first-time donor retention rates higher.

In this case, having donor retention rate on hand made it clear to the organization that they needed a donor retention strategy in addition to a donor acquisition plan. What are your organization's trends amongst these segmented retention rates? Knowing that answer will inform your strategy moving forward.

Donor Lifetime Value

Donor Lifetime Value, or LTV, is another important metric that can greatly increase the impact of your fundraising plan. LTV is a prediction of how much money your organization can expect to receive from a donor during the lifetime of their giving (from first donation to last donation, acquisition to lapse). This information can help you make important decisions about your fundraising budget and where to allocate resources.

The higher your donor lifetime value, the better. A high LTV means you can expect to receive a lot of revenue from your donors before they lapse. Organizations with high LTVs can afford to spend a bit of money on appeals, campaigns, support, and so on to acquire and retain them.

The equation for LTV is relatively simple, but it relies on a few other metrics that can be tricky to calculate. To calculate your LTV you'll need to know your average donor lifespan (how many years a donor maintains their giving), average donation amount, and frequency of donation (the number of gifts a donor makes in one year).

In the end the calculation looks something like this:

$$\text{LTV} = \text{Lifespan} \times \text{Average donation amount} \times (\text{Total \# of donations} \div \text{Total \# of donors})$$

Getting your hands on the input metrics, lifespan, average donation amount, and frequency of giving can be challenging, but the effort is certainly worthwhile. Although we won't dive too deep into it here, I've written extensively in the past³ on how to pair LTV with another metrics, donor acquisition cost to begin the process of measuring how "profitable" your fundraising initiatives really are. This concept is pretty advanced and involved, and not something we'll explore right now, but please know that calculating LTV is worth the time it takes.

Similar to donor retention rates, we'll be interested in segmented values of LTV. For example, what is the lifetime value of a donor that came from a Facebook ad? How does that value compare to the LTV of a donor that first contributed at your local event? Calculating LTV by segment allows you to begin to compare long-term effectiveness of different fundraising campaigns and initiatives.

Knowing lifetime value is incredibly important, but knowing how different segments of your supporters compare on this key metric can be revolutionary for your planning and strategy.

How do I interpret my metrics?

After identifying which metrics you are going to measure and calculating them, you are left with interpretation—essentially answering the question, what do these numbers mean? By answering this question we'll be able to inform our fundraising plan and ultimately our strategy.

³ fundraisingreportcard.com/data-driven-fundraiser/part-4/

What question does each metric answer?

QUESTION	METRIC
Is the direct mail appeal we've been sending out for the past few years really "worth it?"	Donor Lifetime Value
Is the gala a cost effective fundraising initiative?	Donor Acquisition Cost
How well are we building relationships with our first time donors?	First time donor retention rate
Are our supporters increasing or decreasing their cumulative giving each year?	Upgrade and downgraded donors
How much money are we "leaving on the table" each year?	Lapsed donors/donations
Are our past donors coming back to our organization after they leave?	Reactivated donors

If you can, you'll want to begin the interpretation process by calculating at least five years' worth of retention rates and lifetime value metrics. From this you should be able to identify peaks and valleys in both categories.

Data are meant to help drive a discussion (that's why data visualization, another topic for another article, is so important). At your organization, with your team, you'll want to discuss why retention rates peaked in 2014 (for example), and why lifetime value was lower in 2016 (again, as an example). What events and activities could have taken place in those years to influence your key metrics?

After analyzing your historical trends you should be able to identify some of the crucial events or activities that played a role

DATA WITHOUT NARRATIVE ARE USELESS; DATA WITH A STORY ARE COMPELLING.

in how the numbers came to be. Good! We'll use this knowledge of what happened in the past to inform aspects of future strategy (if you're interested in Google searching later, this is called descriptive analytics). If you think it was the specific campaign you sent out in 2014 that boosted retention rates, you might want to consider incorporating that campaign again this year.

This is how we can use data to be a part of our planning process—by discussing what the numbers mean. Data without narrative are useless; data with a story are compelling. In order to craft your story you will review trends over the past five years among your key metrics. You can think of this as benchmarking your organization against itself. What is the best we have historically been able to perform? How did we do that?

It may be compelling to consider benchmarking your organization to other organizations, but you should only do that once you understand the trends in your own historical data. Once that is clear you can propose the question, "how does this compare to similar organizations?"

You'll quickly find that those in leadership positions ask this question. They might ask, for example, "How well are we doing compared to the other foodbank?"

There are a few resources out there that can help you address this question, for example Live Benchmarks⁴ as well as the aforementioned Individual Donor Benchmark Project. If there are other, similar nonprofits in your area, you could connect with them and see if you could benchmark against one another to learn

what is working and what is not. Regardless of what data you find to benchmark against, please remember to benchmark against yourself first (historically), and then look to your peers.

We'll use all of this context to help drive strategy. If you are doing well relative to the past few years, then keep doing what you are doing. If you are doing poorly relative to the past few years you may want to change course. If you are doing well relative to your peers you may want to consider sharing your strategies and tactics with other organizations who aren't performing quite as well. If you are doing worse, than it might be a sign to try different approaches.

Comparison and discussion is how we interpret and make data actionable. Leverage both while going through this process to truly create a data-driven fundraising plan at your organization.

Resources to help you

We're not leaving you high and dry on this quest to use data at your grassroots development shop, far from it! All I've learned about leveraging data in our sector has stemmed from building Fundraising Report Card about two years ago. Fundraising Report Card is a free data analysis tool used by thousands of organizations across the world.

In addition to Fundraising Report Card, you have a few tools in your toolbox to help calculate the metrics we mentioned above:

- Check your donor management system for built-in tools
- Fundraising Effectiveness Project (afpfep.org)
- Excel (not as fancy as the others, but effective!)

Applying this at your shop

Data analysis isn't that bad after all, is it? Sure, that Google search with four hundred million results is a tad overwhelming, but once you get into it, looking at metrics can be like putting together a puzzle. What I've found from partnering with thousands of organizations over the years is that finding focus and knowing why you are looking at data are two of the most important pieces of the puzzle that you need to have solved.

If you're heading back to your desk after reading this article keep these key takeaways in mind:

Fundraising metrics are great, they help us answer our questions and guide strategy. But too many metrics and not the right ones simply become noise. They cloud our vision and actually get in the way.

At your small shop it is incredibly important to understand why you're looking at the numbers before you get in too deep. Always keep in mind the question you are trying to answer. ■

Zach Shefska oversees the Fundraising Report Card, a division of MarketSmart. The Report Card is a free tool that empowers fundraisers to make data-driven fundraising decisions.

⁴ fundraisingreportcard.com/benchmarks/

Reflections on 14 Years with GIFT and the *Grassroots Fundraising Journal*

An Interview with Jennifer Emiko Boyden

Author's note: Jennifer Emiko Boyden has been one of the longest serving staff members of GIFT in its history. I had the great fortune to work with her when I was on the staff of the Grassroots Fundraising Journal and later GIFT and have remained on the Editorial Board of the Journal, as well as being a donor and a frequent writer for the GFJ. Jennifer has been stalwart, smart, hard working and it's hard to imagine GIFT without her. But now I must as she, after 14 years, is moving on. In this interview I ask her to reflect on what she learned over all these years and what kept her in this job.

By Stephanie Roth

SR: I AM TRYING TO REMEMBER when I first met you, because it has to be almost 20 years ago. So tell us a little about how you came to work, the Grassroots Fundraising Journal, because this is prior to GIFT, and what interested you in the organization?

JB: I first got to know the *Grassroots Fundraising Journal* (GFJ) in 2000 when I was a student in the MSW program at San Francisco State. I had an internship at Race Forward (then called the Applied Research Center or ARC) where the GFJ and Klein & Roth Consulting shared office space. One of my first experiences

I WANTED TO DO SOMETHING THAT WAS MEANINGFUL TO ME, AND ADDRESSED SYSTEMIC CHANGE.

with fundraising was co-leading a fundraising training for some environmental justice organizations. Gary Delgado, then director of ARC, believed in “baptism by fire” and sent me off to assist in this training even though I had almost no experience. This is also when I first met you, Stephanie, and I don’t know if you remember helping me and Andrea Cousins, my co-trainer, create the curriculum for the training.

SR: I don’t remember, but I can imagine that happening. And maybe you saw that while fundraising is hard work, and requires people to be willing to confront their taboos about money, a lot of the core principles are just common sense.

JB: I got through that training and found that I liked fundraising more than I might have imagined. Then, in 2004, I was looking for part time work after my daughter was born. Because I knew you and Kim (Klein) and liked what the GFJ was about, I took a job with you. At that time, you were also publishing books through Chardon Press, and I was involved in a variety of things—fulfilling book and GFJ orders, ad sales for the GFJ and other

administrative work. Over time, my responsibilities expanded. The Center for Third World Organizing (CTWO) and Southern Empowerment Project (SEP) along with a number of people including you and Kim, had created GIFT and it was growing right alongside the Journal. Two years after I started with you, GIFT and the GFJ merged and I became coordinator of publications.

SR: What kept you at this job, which was actually a dozen or more small jobs that all required a lot of attention to detail, good customer service skills, ability to create systems, money management, and fundraising? I can imagine other people running screaming from the volume and constant change of your job.

JB: Even though I didn’t set out to work in the field of nonprofit fundraising or publishing, I knew I wanted to do something that was meaningful to me, and addressed systemic change (i.e., rather than do social work in the more traditional sense of casework). I liked the people I worked with and I could see that the GFJ and GIFT did make a difference in the lives of many people and organizations.

SR: As someone who came into this work not because you wanted to be a fundraiser, but to support what you thought was a good organization, how did your experience and thinking about fundraising shift over the years?

JB: When I first started, I was more of a support person and didn’t have the fundraising expertise that the rest of the team did. As I got more involved in the *Journal* and then GIFT, I started learning more about fundraising through my work producing the *Journal*. I actually learned a lot about fundraising through reading the articles in the GFJ.

Then, I really got more involved in fundraising for GIFT in 2009 when you stepped down as GIFT co-director. We did a big “Generations” campaign and it was the first time I made personal asks to my friends. It was early on in the use of online platforms for peer-to-peer fundraising campaigns, and we had great success using one.

I was inspired by the stories people told about raising money, and felt it was an honor to be part of elevating and highlighting

these stories. I got to know so many great organizations and I have been part of getting their experiences out to a broader audience. When I hear from GFJ readers about the lessons they learned and also from attendees at the Money for our Movements conference, it is very validating. I know what we do at GIFT allowed fundrais-

SR: As you indicate, one of the core beliefs at GIFT is that fundraising is not a separate, hidden and thankless task that organizations have to do to bring in much needed money for their work, but instead a form of organizing and of building community support and power. Having people engaged in a variety of ways, including

SOMETIMES WHEN WE LOST FOUNDATION FUNDING OR OUR INDIVIDUAL DONOR CAMPAIGNS DIDN'T DO SO WELL, WE HAD THE STRENGTH OF HAVING A STEADY SOURCE OF INCOME FROM EARNED INCOME.

ing and other income creation to be understood as part of movement building, and it encouraged organizations that worked with low-income communities and communities of color, to realize they could raise the money they needed by being mission driven. We take this for granted now, but in early part of this century, that insight was still new.

SR: You also had a lot of responsibility for the earned income side of the Journal and GIFT. How did ad sales contribute to your confidence in fundraising?

JB: One of my first tasks at the *Journal* was selling display ads. Then when you stepped down from your position of co-director at GIFT, I was responsible for selling ads for the program book we created as a send-off to you. It was a really rewarding experience because so many people were happy to donate and send a message of appreciation to you and to GIFT. It felt great, almost like a runner's high, to have so many people willing to support us. It was especially exciting when someone who hadn't made a very big gift previously took out a half page ad.

And of course, selling ads while not fundraising per se, had a lot of the same elements of relationship-building, making a case, and making the ask.

I began to realize that I really liked the project management side of my job. I'm good at juggling a lot of balls at once. It gave me confidence to take on other new tasks, like the production and editorial side of publishing the GFJ, which involves a lot of moving parts. That is one thing that kept me at this job all these years—it was not just one job!

giving money, is an important factor in an organization's overall success. How does this philosophy play out within GIFT?

JB: Well, of course, we are a Fundraising Institute, so if we can't build a culture of fundraising, then something is really wrong. And I think there is a strong culture of fundraising at GIFT. When a new board or staff member joins GIFT, we make it very clear they'll be doing fundraising. Every board and staff member has a portfolio of donors to stay in touch with.

In addition to working with donors, I have taken a high profile in income generation through ad sales work and have built relationships over time with consultants and other vendors who advertise in the GFJ. Over time, I've also taken on more fundraising responsibilities. For the GFJ's 30th anniversary, I participated in our 30 for 30 campaign where we recruited 30 people to raise \$1,000 each to reach our goal of \$30,000.

Also, because the GFJ has always had at least a portion of its budget paid for by subscriptions (earned income), I was involved in finding creative ways to expand our subscriber base as well as try to get some of our subscribers to make donations above and beyond their subscription. It has varied but over the years I've been at GIFT, we've always brought in at least 50 percent and often much more, from earned income (subscriptions, advertising, conference registration fees, and training fees).

One of GIFT's strengths has been having diverse sources of income. Sometimes when we lost foundation funding or our individual donor campaigns didn't do so well, we had the strength of having a steady source of income from earned income. Marking anniversaries or special occasions with program books has been

a successful strategy for us, and I think this speaks to the community that GIFT has built over the years.

SR: What is different about the field of fundraising now than when you first came to work at the Grassroots Fundraising Journal 14 years ago?

JB: The main difference that I've seen is that there is SO much more free information online—you can google “mail appeals” and get a YouTube video on what makes a good appeal. This has been challenging for GIFT, which relies on people paying for our products and services. That doesn't mean that the free stuff is always high quality but there is a lot that's useful too.

I'm seeing organizations get more creative to be able to draw more attention to their work and to reach people who may not have been donors before. We published an article in the GFJ recently about the Tennessee Immigrant & Refugee Rights Coalition that does an annual food crawl that takes place in a neighborhood where there are lots of restaurants run by immigrants. Their last event raised \$40,000 and also promoted local businesses at the same time they raised money and built community good will.

GFJ has also featured articles about the work of groups building alternative economic systems like the time banking project of the Womanist Working Collective in Philadelphia, which I loved learning more about. And of course, was so thrilled to share the success of land reclamation efforts here locally in Oakland through the #Liberate23rdAve Building campaign and by Queer the Land in Seattle. The recent Black Mama's Bail Out campaigns, and the huge outpouring of support for groups providing legal and social services to families being torn apart at the border are also amazing examples of significant grassroots resources being organized in a relatively short time span. I think it's interesting that at the same time we're seeing an increase in crowdfunding campaigns to directly support community members for things like bail, funeral services, medical expenses, and family leave, we're also seeing an expansion of vehicles like donor advised funds, which seem to put more distance between the donor and the organization.

One thing that I think has had an impact on how social justice organizations have approached fundraising (in addition to the Grassroots Fundraising Journal, our biennial conference and other GIFT programs) are the Underdeveloped and Fundraising Bright Spots reports that looked at the challenges facing devel-

opment staff when there is not a culture of fundraising in the organization. Certainly people's consciousness has changed, even though there is a lot more work to be done.

SR: What advice do you have for people seeking development positions, especially people of color?

JB: I sometimes get asked by organizations that are trying to recruit people of color to fundraising positions what they can do to be more appealing to people of color. I tell them that as a candidate, I would want to see other people of color on the staff and board of the organization. Also, that there is an explicit understanding that everyone in the organization is going to be involved in fundraising. If you don't see ANY of that in a job description, if you talk to board members and none of them have any enthusiasm about making asks, I would proceed cautiously. I would also want to know how much support I'd get from others in the organization and would try to talk to former employees (especially former fundraisers) if possible. What is it like to try to move the work in that way?

SR: It's been a kind of truism in fundraising that these positions are ones with lots of responsibility and little authority. Do you think that's changing, and what does it mean for people of color getting into the work?

JB: My sense is that not all that much has changed although there's much more awareness of the issue. It's generally the fundraising and administrative work that doesn't get recognized in our organizations or our movements. The people doing that kind of work only get noticed if there's a problem. There are so many people who are unrecognized in that back office work even though their work is so critical in keeping things moving. And of course, sometimes fundraisers have MORE to say because they're the ones who have a deeper understanding of how to explain the work and connect with potential supporters and funders.

SR: Jennifer, we will miss you so much and I know everyone who has read the Journal over the past many years, or gone to the Money for our Movements Conference, joins me in wishing you well.

JB: It's been a wild and wonderful ride and I look forward to continuing to read the Journal! ■

Stephanie Roth is a principal at Klein and Roth Consulting and a member of the *Journal* Editorial Board.



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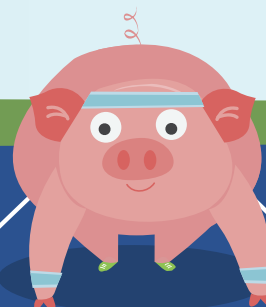
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