

Fundraising Assistance Program

Webinar Supplemental Manual

FRENCH AMERICAN CHARITABLE TRUST

FRENCH AMERICAN CHARITABLE TRUST

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Introduction

The last couple years have been hard on many community-based organizations. Funding has been tight. Many of the foundations we have come to depend upon have cut back funding or dropped us all together. Some of us have little or no experience in raising money from our main constituencies, the community(ies) we seek to serve.

But there is a long and proud history of important advocacy and organizing efforts being funded from within – from among the members, clients, allies and communities needing the change being sought. Grassroots and donor fundraising was central to the success of the civil rights, environmental justice, feminist and gay organizing movements. Fundraising we can control must become central if we are to guarantee the success of today’s organizing and advocacy efforts.

The Fundraising Assistance Program (FAP) of The French American Charitable Trust (FACT) seeks to provide support to grantee organizations committed to guaranteeing their future through a diversified funding base. This training manual accompanies and expands upon the FAP Webinar. We hope you will find it useful in building your understanding of and the necessity for reclaiming these important skills and strategies.

These materials were prepared by Rebecca O. Johnson, James (Kim) Gilliam, Alfreda Barringer with advice and counsel from Emily Goldfarb, Rona Fernandez and Holly Fincke.

Acknowledgements

All of us who have been fundraisers over the years are deeply grateful to GIFT and the Grassroots Fundraising Journal. GRFJ articles, webinars and resources have provided invaluable education, advice and direction to the field for many years. We encourage all FAP webinar participants to subscribe to the Journal, access the great online resources and attend the GIFT conference: Money for Our Movements on August 12 & 13 in Oakland, CA.

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Section 1.1: Creating A Culture of Fundraising

Many of us have received as much as 90% of our funding from foundations and other grants. This may have led to a sense within your organization that fundraising is something mysterious, tedious and highly specialized that only a few people might learn, know or even worry about.

Fundraising efforts may be “siloeed off,” that is, completely isolated from the advocacy, organizing, and program work that is your organization’s mission and reason for existence. Because of this professionalization and isolation of fundraising many of our organizations have not developed a culture of full participation in the raising of financial support for our social change efforts.

Key steps to building a fundraising culture in your organization include:

- Building a culture of fundraising among staff
- Building a culture of fundraising with the board
- Building an infrastructure for fundraising
- Building a clear identity^{FN}

The FAP Webinar, training manual and follow up consultation will help you put these pieces together.

The following exercise will help you think about who participates in your organization’s fundraising efforts and whether they have a lead or supporting role, or none at all.

This exercise is to be completed before attending the FAP Webinar.

The background readings: *Silos Are For Farms*, by Tina Cincotti and *4 Steps To Building A Fundraising Culture: A Case Study* by Manish Vaidya follow this section.

Exercise 1.1: Who Participates In Your Organization's Fundraising?

Who Participates Now?	Yes/All	Some	No/None
Board of Directors			
Membership			
Leadership			
Executive Director			
Development Staff			
Program Staff			
Administrative Staff			
Organizers			
Volunteers			

Check all that apply:

Current Roles	Lead	Support	None
Board of Directors			
Membership			
Leadership			
Executive Director			
Development Staff			
Program Staff			
Administrative Staff			
Organizers			
Volunteers			



Members from Neighbor to Neighbor chapters rallied in Boston for an increase in the state minimum wage. Delivering the message that “a buck is not enough,” volunteers showed legislators what an extra 50 cents an hour would mean over the course of a year.

Silos Are for Farms

How to Make Fundraising a Part of Your Organizing

By Tina Cincotti

WHEN I STARTED FUNDRAISING about 12 years ago, I was working as an organizer. A few years later, when I read the *Journal's* classic article by the late Vicki Quatmann, “Organizing & Fundraising: Sisters in the Struggle,” (Vol. 13, No. 6, Dec. 1994), something clicked. Organizing and fundraising felt connected. Vicki helped me figure out why.

Since then, I’ve strived to bring a “culture of fundraising” to all the organizations I work with—a culture where fundraising and philanthropy are just as much a part of the organization’s core mission as their program work is. The two cannot be separated.

Barack Obama’s campaign for president brought together organizing and fundraising more powerfully than has ever been done on such a huge scale. The country experienced a level of volunteerism and a level of giving that we’d never seen before. And we are still seeing increasing numbers of people volunteering.

These responses demonstrate the proven connection between giving time and giving money. A study by researcher Penelope Burk showed that 93 percent of donors volunteer and 95 percent give to the organizations where they volunteer. So there is a natural connection between organizing people to give time and organizing people to give money. Notice that I used

the word “organizing.” Fundraising is organizing. If you can do one, you can do the other. In fact, if you can do one, you must do the other.

This idea of building an organizational culture of fundraising makes sense to a lot of people in theory. Yet, often times they don’t know how to make it happen in practice at their organizations. A big part of my work focuses on helping groups integrate their fundraising and their organizing.

This article builds on the ideas Vicki raised and offers practical suggestions for breaking down divisions between program work and fundraising. Here are some tips and strategies to get you started.

1. Discuss the Similarities of Organizing and Fundraising

At their core, organizing and fundraising are both about building relationships and building community. Unfortunately, we often hear the word *fundraising* and immediately jump to the part where you ask someone for money, even though that’s only 5 percent of the job. Undoing this misconception is critical. Start by taking a step back and expanding your view of what fundraising is really all about: building a broad network of like-minded people who will give you time, money, advice, power

THIS DONOR TOTALLY DEFIED THE ORGANIZER'S VISION OF WHO A \$1,000 DONOR IS. THAT EXPERIENCE BROKE DOWN THE CONCEPT OF "US VERSUS THEM," OF DONORS BEING SOMEHOW DIFFERENT FROM PEOPLE SHE KNOWS.

in numbers, moral support in good times and bad, and lots more. Organizers and leaders from your membership base will see striking similarities between identifying and involving new volunteers and identifying and involving potential donors. Both start by recognizing those who are predisposed to your cause and learning more about their interests, then getting them involved when the time is right by starting small, and continuing to build the relationship to steady, more dedicated involvement. Seeing these parallels helps organizers and membership leaders realize that they already possess most of the skills needed to be a great fundraiser—because they are the same skills that it takes to be a great organizer. This insight won't single-handedly compel anyone to start fundraising, but it's an important first step in understanding what fundraising is really all about.

2. Create Space to Talk about What Is Hard about Fundraising

Fundraising is scary for virtually everyone at first. There is no getting around that. It's also incredibly rewarding and empowering, but that doesn't come until later for most of us. U.S. culture is riddled with taboos about money—it's something that polite people just aren't supposed to talk about. So, what does that say about those of us who are not only talking about money but also asking you for some of yours?

Here's what it says to me: It says we will not play by these rules. It says we will not allow a system that has created such a vastly unequal distribution of wealth to go unchallenged. It says that we are proud of the life-changing work that we are doing, that we need money to do the work, and that we aren't afraid to ask for it. Fundraising doesn't support political work; fundraising *is* political work. Fundraising doesn't support organizing; fundraising *is* organizing. Fundraising doesn't support movement building; fundraising *is* movement building.

Now, as I get down off my soapbox, let me say how important it is that you talk with anyone who is new to fundraising about the societal taboos around talking about money. These are very real. Discuss where they come from. Talk about people's first associations and earliest memories of money and share yours. Create space to talk about how they feel about asking someone for money. Depending on the culture of your organization, you'll have to think about how personal you want to get with this conversation. We certainly don't want anyone to feel put on the spot or as though they are being forced into

some kind of group therapy session. Be aware of this danger and respect people's limits as well as your own boundaries.

The other piece that's important to recognize is that what's challenging about fundraising can be different for different people. If you grew up in poverty or struggling to make ends meet, your perspective and feelings about asking someone for a donation may be different from those of your co-worker who was raised upper-middle class. This is not to say that organizers or people from families who didn't have to worry about money are comfortable fundraising, nor is the opposite necessarily true—that folks who grew up poor are always reluctant to ask for money. It's simply to say that everyone's comforts and discomforts will vary.

Race and class dynamics are as present within fundraising as with anything else, probably even more so because we are dealing directly with money. Be conscious of this factor and incorporate into your conversations about fundraising the ways racism, classism, and privilege are at play.

3. Start with Small, Less Scary Fundraising Work, and Demystify Who Donors Are

It can be reassuring to organizers and members to see all the different ways they can help raise money without actually having to make "the ask." This isn't to say that they won't grow into that part of fundraising. But it's helpful to get one's feet wet doing other things first—calling donors to thank them for their gift, accompanying a seasoned fundraiser on a cultivation or stewardship visit, giving tours to donors, leading an open house, or writing handwritten thank you cards to people who recently attended a luncheon.

By beginning to have direct contact with donors, everyone will start to see them as the real people they are. For example, I remember working with an organizer-in-training to write personal notes on thank you letters. She came across the letter for a close organizational ally and was blown away by the size of the woman's contribution. This donor totally defied the organizer's vision of who a \$1,000 donor is. That experience broke down the concept of "us versus them" for that organizer, of donors being somehow different from people she knows. This was a critical step for her. She not only realized that she could be successful in asking for a donation of that size or more, she also discovered that she herself knew people and could relate to people capable of giving significant gifts.

4. Make Fundraising Part of Leadership Development

Leadership development is a core program for many grassroots organizations. When members get involved and volunteer, they might learn about the political process, how to write a press release, public speaking skills, and so on. Fundraising rarely makes this list. That has to change. Your members don't need to be shielded or protected from the complications of budgets and balance sheets. Understanding the organization's finances helps a person appreciate the need for fundraising. By not including fundraising and organizational finances as part of our leadership development curriculum, we are colluding with the same system that makes money a societal taboo that's not to be discussed.

Educate your members about the role of fundraising in building a movement for justice. Show volunteers your budget and help them understand how to read it. Tell them where you get the money to pay for all the work your organization does and all the time that goes into raising that money. Talk to them about how they can help, and not just by selling raffle tickets and organizing a yard sale. See if your volunteers would be willing to come with you to meet with a supporter to talk about the impact the organization has had in their lives. Ask them to write a "thank you" note to a donor or call a new contributor who just gave their first gift. For a supporter, there's nothing more powerful than hearing directly from people on the ground about how their donation made a difference.

5. Offer Different Ways to be Involved in Fundraising

Everyone has different talents. Match people up with the fundraising strategies that play to their strengths. If someone is a great writer, they may be able to help write direct mail appeals, newsletter articles, grant proposals, or donor acknowledgments. A born party planner could take the lead on house parties or grassroots events for the organization.

Always, always think about ways to connect organizers and members to individual donor work, including with donors who give significant high-dollar gifts. Don't assume your organizers only know low-dollar donors. They know prospects for "major" gifts as well. Remember—giving is not a state of wealth; it's a state of mind. As I touched on above, the more you equate "major donor" with "rich person," the less successful your fundraising will be.

Finally, don't assume that so-called major donors won't want to meet with organizers or membership leaders. These high-dollar supporters are exactly the ones who want to hear firsthand stories about the work, and who better to tell them than an organizer and a lead volunteer.



Neighbor to Neighbor volunteers from the city of Lynn, MA, take part in a phone bank.

6. Provide Structure and Build in Systems of Accountability

Fundraising should be part of every staff person's workplan alongside their organizing responsibilities. At Neighbor to Neighbor Massachusetts (N2N-MA), where I was the development director for seven years, each organizer is assigned a list of donors, fundraising goals, and a timeline. There is also an agreed-upon amount of time that each person will spend fundraising each week. The time may vary from person to person and from week to week but it is planned into the organizers' schedules. Otherwise, it won't happen. It can't be an add-on for when there's extra time. Because, as any organizer knows, there's never extra time.

Regular reporting about fundraising should be integrated into staff meetings and supervisory check-ins. At N2N-MA, I put fundraising as the first item on the agenda as often as possible. Having it at the top made sure the group was alert and that we didn't run out of time and have to cut the discussion short. When you meet, have people report on their fundraising priorities, accomplishments, and struggles, just as they do with their organizing. This sharing also provides a level of group accountability so each person can hear what their peers are working on.

Absolute transparency around income and expenses is even more critical for organizations where all staff have fundraising responsibilities. Report on budget projections and provide financial reports regularly so that it's clearly known how much money needs to be raised, how much has been pledged, and how much remains to bring in. Also, discuss potential shortfalls as a group and troubleshoot new fundraising strategies to close

the gap. Everyone in the organization deserves to know and understand the state of the group's finances. It also helps staff to understand how their piece fits into the big picture.

7. Give Trainings, Templates, Tools and Talking Points

Spend time regularly on skill-building exercises related to fundraising. At N2N-MA, I tried to give the organizers a new fundraising script every month or two, and I'd pair them up at staff meeting to practice. I'd have people sit back-to-back so it would feel as close to a real phone call as possible, without the benefits of eye contact and body language. I'd also sometimes pair veteran organizers who had been fundraising for a while with newer recruits for peer mentoring and support. It was incredibly powerful for organizers with little fundraising experience to see what skilled fundraisers they could become. I'd plan enough time so that each person got to play the donor and the fundraiser at least once. Then I'd bring the group back together to share what worked well and where they got stuck.

With any new script, I found the organizers were more comfortable getting on the phones if they'd already had a chance to run through it a few times.

In addition to training, it's important for development staff to consistently provide template letters, sample voicemail messages, and talking points on recent accomplishments and upcoming campaigns. Some people use them. Some don't. Some just feel better knowing they have them if they need them. Either way, giving organizers all the tools they need to succeed maximizes the effectiveness of their fundraising time and enables them to hit the ground running. You don't want each person reinventing the wheel every time a follow-up letter needs to be sent out.

Providing these materials also sends the message that you respect and value their time—something that all organizers never have enough of!

8. Not Everyone Will Grow to Love Fundraising

Although every organizer can be an effective fundraiser, that doesn't mean it's going to be everyone's favorite thing to do. Some will like it. Some will love it. Some won't. That's okay. They don't have to love, or even like, every aspect of their job. But fundraising is a core skill. All organizers and members need to know how to do it.

This model is also the most sustainable way to build a long-term, integrated movement for social change—so it's responsible organizing too. Because fundraising isn't the primary job responsibility of any organizer, it's important to understand that they will have more time to give to fundraising at some times

than others, depending on the ebb and flow of your group's program work. Be sympathetic to this flow.

At the same time, it is also important to remind organizers that often the best time to raise money is at the height of a campaign. This is a delicate balance. It is also one of the reasons why it is so important to have a structure in place where fundraising is part of everyone's weekly workplan and is discussed regularly at supervisory check-ins and at staff meetings. Otherwise, it's the first thing to go at crunch time!

9. Lead By Example—It's a Two-Way Street

It should go without saying that fundraising staff must be included in strategic planning sessions, staff retreats, and other organizational meetings. As a development director, I also found it important to spend some of my time organizing. Not at the level that organizers spend time fundraising, but a few times each year spending some time in the field door-knocking or phone-banking kept me connected to the work.

This kind of involvement isn't anything fancy that requires training as a professional organizer, but it's enough to give you a real sense of the work on the ground. And since I usually "volunteered" at peak campaign season when extra hands were desperately needed, the organizers and the membership really appreciated it as well. This involvement was good for our relationships and contributed to all of us feeling like part of the same team.

10. Consider the Benefits

These practices won't all work exactly as outlined for every organization. And transitioning to this model can be a long process. But you have to start somewhere and the benefits are enormous. Here is just a glimpse of what you can expect if you take steps toward breaking down the divisions between your organizing and your fundraising:

- More collaboration within your organization
- More resources dedicated to fundraising
- Stronger relationships with your donors
- More volunteers as donors
- More donors as volunteers
- More money for program work
- A stronger movement for change

Now, who wouldn't want all that? ■

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Four Steps

TO BUILDING A FUNDRAISING CULTURE: *A Case Study*

BY MANISH VAIDYA

When I was an intern with the Grassroots Institute for Fundraising Training (GIFT) in 2005, I was placed with a wonderful group, Legal Services for Prisoners with Children (LSPC). At the time, LSPC was a 27-year-old social justice organization focused on the prison crisis for women in California: the fact that California incarcerates more women — mostly poor women, mostly women of color, mostly mothers — than anywhere else on the planet.

The organization had grown from a small group of volunteers advocating for California women prisoners' rights into a national group with 14 staff, 14 board members, and an \$800,000 budget. One of its goals is to build a human rights movement led by currently and formerly incarcerated people and their families.

Though LSPC had raised money from individual donations throughout its history, it had never had a coordinated grassroots fundraising program. My internship was meant to change that.

DEFINING THE GOALS

I first talked with key LSPC staff, and we decided to set some short- and medium-term building goals for our long-term success. The concept of building is one that the community organizing/program staff and board members can relate to because it fits with the organization's program of building a movement for the rights of incarcerated people and their family members. In the fundraising arena, we decided on four core goals.

- **Build a culture of fundraising among staff:** The organization is well known in foundation circles, but we knew it had to increase grassroots fundraising if it was going to survive over the long haul. We had to *want* to ask many people to support our work many times.

- **Build a culture of fundraising among board members:** Like the staff, the board wasn't asking for money from individuals very often. We also needed to recruit and retain new board leadership in a way that also honored the

work of current board members. Some board members, founders of LSPC, had served for more than 20 years!

- **Build an infrastructure for fundraising:** We needed systems and processes that were easy to learn and to use, that reflected the grassroots "family feel" of the organization, and that linked to everything we did as an organization — so we could be sustainable for the long haul.

- **Build a clear identity:** The group has a number of programs that work with formerly incarcerated people, survivors of domestic violence, elderly prisoners, and families of incarcerated people. We wanted our communications and fundraising to reflect that we are led and informed by, and accountable to, our constituency. We wanted to balance our grassroots family feel with nice-looking materials that showed that we're professional and we get things done.

BUILDING A CULTURE OF FUNDRAISING AMONG STAFF

With the advice of a fundraising consultant, I worked with development staff to draft an annual fundraising plan tied to our proposed budget. Planning forced us to think more intentionally about our work, and we included challenging but reasonable grassroots fundraising goals. The process of developing the fundraising plan as a team, describing it to the staff, asking the board to approve it, and evaluating it for the future was a critical piece of building a fundraising culture. It stimulated conversations about fundraising and its importance to our work.

The consultant also held a fundraising training for staff. We talked about money, power, social justice and fundraising for the first time as a large group. It changed how we thought about fundraising — from a necessary evil to something we were proud to do, and as something that goes hand-in-hand with our community organizing

work. Staff got excited about asking people for financial support to keep building the movement!

At the fundraising training, staff came up with simple ways they could be involved with grassroots fundraising. They agreed to continue writing notes on appeal letters and handwritten thank-you cards. They would also start stapling business cards or write contact information from prospects onto a new “database intake form,” which could be used to jot notes about the prospect’s relationship to LSPC and to the staff member, their interests, and so on. Copies of

member, I follow up with other board members through one-on-one phone calls.

We decided to hold an open house in Spring 2006. We knew it would be easy to organize, raise our visibility with prospects and help us retain current donors, and it was something fun that board and staff could do together. We already had our accomplishments displayed throughout our office space. All we did that first year was design and mail invitations, secure door prize and food donations, clean up our desks, and recruit two board members to emcee the

We increased the number of donor calls and visits we chose to do, and our return increased dramatically. Several donors increased their gifts by thousands of dollars!

the database intake form are now in a hanging folder on the wall with the title “Help build the future of LSPC!”

The fundraising training and conversations are starting to pay off in interesting ways. In 2005, we held an opening event of a PhotoVoice exhibit depicting how youth see themselves as targets of the prison and policing system. The 100-plus attendees enjoyed food, a program, and music. After the event, one of the coordinators said, “We really should have done a pitch there.” Now we include a fundraising pitch in all our events.

Our fundraising team also watched a fundraising training video together and did role plays of donor asks in preparation for our year-end fundraising campaign. We increased the number of donor calls and visits we chose to do, and our return increased dramatically. Several donors increased their gifts by thousands of dollars! At first, most of the face-to-face visits and phone calls were done by the development team; this year we plan to bring board members and program staff on donor visits — with the goal that eventually, every staff and board member will do face-to-face asks.

BUILDING A CULTURE OF FUNDRAISING WITH THE BOARD

The consultant also held a fundraising training for the board. Like the staff, board members were surprised that fundraising could feel so empowering, and they especially connected with the social justice orientation.

Board members made commitments to fundraise in ways that made sense for them. Several board members volunteered to make or donate items as door prizes for an open house. One member decided to go door-to-door to talk with her neighbors about LSPC. All board members were asked for individual gifts and for help in acquiring new donors. We have been dedicating more time at board meetings to review individual board member commitments, and as part of my post-internship role as a board

event and coordinate a brief program with a pitch. We chose as emcees the board chair, a long-time board member in his sixties, and our newest and also youngest board member, a woman in her mid-twenties. This was good modeling of intergenerational leadership development. We expected to gross \$2,000 — instead, \$6,000 came in.

The open house generated excitement among our board and staff and in the community. Seventy-five people came to our office, including new prospects and long-time donors who had never seen the space. The program dragged on too long and the pitch could have been better, but we raised money and attendees told us they had fun.

The energy from the open house carried over into discussions among long-time board members about setting board term limits and developing new leaders for the board.

With the staff fearing some long-time board members might feel they were being ousted, a well-respected board member proposed that we start an advisory council. This non-voting body would allow us to call on former board members for advice on major organizational decisions and would honor our elders publicly in our print materials. Long-time board members loved the idea of being freed from some of the larger time commitments of board responsibilities while staying engaged.

We recruited two younger board members (including myself) who were already connected to LSPC, and made a long-term commitment to continue recruiting board members from our programs and from the people we work with regularly to help us stay accountable to our constituency.

Board members and the staff fundraising team discussed key things board members would need in order to be great advocates for LSPC. This discussion resulted in the creation of a comprehensive board binder with articles on fundraising and other areas of board development, scheduling an orientation for new board members, and a goal of having more regular communication between staff and board.

BUILDING AN INFRASTRUCTURE FOR FUNDRAISING

Fundraising has taken on a visual life in the office, which keeps us on track. Hanging on a wall in the office is a large fundraising thermometer, with our annual income goal at the top. Every time we receive a grant, complete a fundraising campaign, measure the return from our newsletter, and so on, that amount is registered on the thermometer. Every staff member now always knows how our fundraising is going.

Next to the thermometer is a large-type printout of our fundraising plan, with highlighted sections for grassroots fundraising. Next to the fundraising plan is a four-month calendar decked out with sticky notes color-coded by type of fundraising activity that announce major dates, including upcoming proposal deadlines, donor visits, and so on. Next to the calendar, eight sheets of paper account for the remaining eight months of the year, with fundraising tasks on sticky notes posted on the appropriate month. Each month, the four-month calendar changes as we move sticky notes around.

This system works like clockwork. Development team meetings take place in the room where all this information is posted. At each meeting, we review our commitments, revising them as necessary. The system is also helpful to board members, who can see at a glance how much money has been raised, what donor visits are scheduled for the month, or whether any grant reports are due soon.

Creating this infrastructure gave the organization a more realistic picture of what it takes to coordinate the fundraising work, with the result that the group saw the need for a new staff position of Grassroots Fundraiser/Media Communications Coordinator. Although we're still evaluating whether this job is too big for one person, having a staff person who is proactively building relationships with media will help us bring our constituents' voices to the public and raise our visibility, which will help our fundraising.

Another infrastructure item we attended to was our database, upgrading to a program that enables us to code, analyze and segment our donor list so as to target our fundraising efforts. The more powerful software has made fundraising both more efficient and more cost-effective, and has already paid for itself in increased income.

BUILDING A CLEAR IDENTITY

In 27 years, the organization never had a logo or organizational colors. Luckily for me, the staff was already aching to change to a bold, cohesive, professional-looking message. Last spring, we launched our logo, nicknamed Phoenix Rising — a depiction of a strong, crimson-colored

phoenix soaring above water. We also created new business cards, letterhead and envelopes, and soon we will have a new website — all of which show us to be political, professional, and intentional about our work while providing a consistent image that members, donors, and prospects can remember.

At the same time, we upgraded our newsletter from amateur-ugly to be more professional looking and visually appealing. We immediately saw a greater return from that mailing, and I feel it helped our overall fundraising. Now we're considering publishing shorter newsletters quarterly rather than the big annual newsletter that has been going out, on the theory that most donors will appreciate the increased contact.

Another part of our identity is the handwritten thank-you notes we send, printed on cards featuring the artwork of some of our incarcerated clients, with a blurb about the artist on the back. We feel these cards extend the family feel of the organization, and more important, the cards make our incarcerated clients more visible to donors.

LSPC's fundraising program is ripe with opportunity. Surely, it will take much more for us to build a sustainable grassroots fundraising program. However, with a new logo and marketing materials, a new staff position coordinating grassroots fundraising and media relations, with structures and processes in place and increased giving, I think we're on the right track. **BF**

MANISH VAIDYA IS A MEMBER OF THE BOARD OF DIRECTORS OF LEGAL SERVICES FOR PRISONERS WITH CHILDREN AND PROGRAM COORDINATOR AT GIFT, GRASSROOTS INSTITUTE FOR FUNDRAISING TRAINING.

For More Information

LEGAL SERVICES FOR PRISONERS WITH CHILDREN:
www.prisonerswithchildren.org

LSPC'S ALL OF US OR NONE PROJECT:
www.allofusornone.org

GIFT INTERNSHIP PROGRAM:
www.grassrootsinstitute.org/pages/intern.html

We want YOUR Story!

Do you have a story of how your group is building a culture of fundraising?

Have you done something that's worked particularly well? Or has something you tried not worked out?

We'd love to hear your story at:
jennifer@grassrootsfundraising.org

Section 1.2: Defining Our Terms: From Grassroots to Major Donors

The following definitions are to provide us a common language for and orientation to the ideas and topics that are covered in the webinar and this manual.

One way to think about Grassroots Fundraising is that it is the set of non-grant writing based fundraising activities controlled by your organization that enables you to raise the money to keep your doors open. Your board/governance body and staff determine the amount of money needed to maintain vital services and presence.

Activities: the actions you will take in order to reach your objectives and goals (i.e. hold a baby fair in order to reach your objective of educating local expectant parents about normal birth options).¹ These are commonly referred to as **Strategies**.

Canvass: “The dictionary defines canvassing as going ‘through a district or to persons to solicit orders, pledges, or votes.’ It also describes canvassing as an ‘examination, as in the way of discussion or debate.’ The programs I work with use canvassing in both these ways, first to discuss disarmament and human rights issues, and second to solicit membership support.”²

Constituent/cy: A constituent is a part of a whole. A constituency is a part of a population within a larger group. For purposes of this training manual constituencies are those people your organization seeks to reach, enfranchise, empower, and recruit to your mission.

Donor or Grantor: an individual or organization that makes a grant or contribution to a donee.³ Donors are frequently categorized as small donors (usually less than \$100), medium size donors (varies by organization) and major donors (see below).

Fundraising Plan: an organizational plan over a specific period of time that defines all fundraising activities, events, and grant applications⁴

Grassroots fundraising: efforts to raise money from individuals or groups from the local community on a broad basis. Grassroots fundraising activities include membership drives, raffles, auctions, benefits, and a range of other activities.⁵

¹ Fundraising Glossary of Terms,
<http://www.lamaze.org/Advocacy/ResourcesforAdvocates/FundraisingToolkit/FundraisingGlossary/tabid/445/Default.aspx>

² Lynn Fahselt, *Door to Door Canvassing*, Grassroots Fundraising Journal, Sept./Oct. 2003

³ Fundraising Glossary of Terms,

⁴ Fundraising Glossary of Terms,

Donor Fundraising: Direct requests for support to individuals at any amount. This can be accomplished through face-to-face, door-to-door (see canvass), mail and online solicitations.

Major Donor: This varies by organization, but it is generally someone who gives a gift that is above the normal gift range of most of your other donors. This might be \$100 and up, \$250 and up, \$500 or \$1,000 and up.

Member/ship: Those persons and/or organizations that have allied themselves with your mission through some formal mechanism. These may be a range of constituents, from those who will benefit directly from your advocacy or organizing to allies who seek to support your organization's efforts.

Sustainers: A member or donor who commits to supporting your organization through a monthly or quarterly gift. This is an effective way to help donors giving small amounts to increase the size of their gifts. It is also an important way for online activists and supporters to become donors to your organization.

Background reading: *A Definition of Grassroots Fundraising*, Kim Klein, opportunityknocks.org, 2009 follows this section.

⁵ Ibid

A Definition of Grassroots Fundraising

By Kim Klein



What is grassroots fundraising? People often characterize grassroots fundraising as small special events, like lemonade stands or bake sales, or as being about getting a lot of very small donations, or perhaps just being some politically correct thing to do in order to placate the masses. These people will often think the real money is in foundations or corporations. Since I have been in grassroots fundraising for the bulk of the 32 years I have spent in fundraising, I think it is useful to define it. How is it different from any other kind of fundraising? Fundraising is a pretty straightforward field—even the name is plain and simple. We need money and to get it, we have to raise it. Foundation fundraising means researching foundations, writing proposals and seeking grants. Corporate fundraising means figuring out how our nonprofit: what we do, who we serve, who we have contact with, might help a corporation so that they would want to partner with us and give us some money. Government fundraising means seeking funding that originates as taxes for our projects and programs.

The term “grassroots” is a term used to denote any kind of effort that derives most of its power and reason for being from a community, and from common ordinary people. Grassroots political movements are characterized by organizing in specific communities or among specific types of people, such as factory workers or students and organizing these groups to advocate for the changes they want to see. Any kind of grassroots effort denotes the common people as constituting a fundamental political and economic group. So grassroots fundraising follows the same principles. Grassroots fundraising means and organization uses a wide variety of strategies to invite as many people as possible to give donations of widely varying amounts. It also means a lot of people are involved in raising the money needed. A grassroots organization is independent: no one source of money is very important to that group. If a person or a corporation says “We don’t like what you are doing and we don’t want to fund you any more, the nonprofit can say, “Well we are sorry to hear that and we will miss you.” The nonprofit will not say, “Oh, no, don’t leave. We will change what we are doing to please you.” A grassroots organization is also independent of any one person: it has leaders, but no one leader is so important that if that person left or died, the organization would not be able to continue. Leadership is shared, skills are taught to all members of the organization so that each person in the organization has her or his job, but also has skills to do other jobs and a goal of the organization is to share information and skills to as many people as possible, as well as to invite as many people as possible to give money.

Grassroots fundraising welcomes and encourages small donations and large donations. Keep in mind that the way you raise your money reflects your values. If you get most or all of your money from the government, you are saying that the work you do should be supported by taxes. In most countries around the world, social services that aim at keeping people out of

poverty are provided by government funding. This is fine. If you get most or all of your money from corporations, you are saying that the work you do can be done in partnership with for profit companies, and that your agenda as a nonprofit can exist in harmony with the agendas of corporations. In many countries, a lot of arts and culture, as well as research and higher education is supported by corporate giving. This is fine. Grassroots fundraising does not preclude corporate, foundation or government support for your organization. But grassroots fundraising does mean that if you believe that the work you do should be supported by the people who most benefit from it, as well as saying that the work you do needs to have the maximum amount of independence, then you will want to have your money from as many people and places as you can manage.

Section 1.3: Why Do It? Grant Writing is So Much Easier!

We all now know that foundation support, except for a few quite notable exceptions, can be fickle, but there are **two reasons** that stand out for building a grassroots and donor fundraising program.

It is important to have many strategies for raising money, as the current economic climate demonstrates. Central to the importance of grassroots and donor fundraising is the capacity it gives your organization to determine what is most important to your members/constituents – **regardless of foundation interests and trends** – and to have the means to pay for it.

Grassroots Fundraising builds /increases your organization's capacity for

- Self determination
- Leadership development
- Demonstrating community/constituency commitment

Section 1.4: Organizational Roles & Responsibilities

We now know that everyone in your organization has a role to play in fundraising.

Board of Directors: It is the board's role to set policy, approve a budget and **guarantee the organization has the funding it needs to carry out its mission**. True board commitment is demonstrated by a commitment of time and money.⁶

Development or Fundraising Committee: is usually a committee of the Board of Directors. It can be particularly helpful in focusing organizational efforts especially since energetic and knowledgeable volunteers can augment the board representation on the committee. Its duties include defining the short- and long-term funding needs of the organization with the help of the full Board and Executive Director; obtaining training for the full Board on corporate solicitation, proposal-writing and marketing; involving all Board members in fundraising and organize fundraising activities that take into consideration each Board member's unique talents; reviewing progress on fundraising goals and motivating the full Board in its fundraising efforts; making personal donations, and encouraging fellow Board members to do likewise; and identifying, cultivating, and enlisting community leaders to serve on the Development Committee⁷.

Staff: The Executive Director usually has primary responsibility for guaranteeing the organization is meeting its fundraising goals. S/he may be assisted by a Grassroots Fundraiser or Director of Development. All of their time is focused on fundraising. All staff members, however, have a role to play in raising money. Their roles should be specified in the annual fundraising plan and calendar.

Volunteers: Can serve on the Development Committee as well as on event committees, helping with canvasses, mailings, phone banking, member recruitment and individual donor visits.

Membership – Are members expected to pay dues? This is a key question. Membership dues show commitment to mission, legitimacy of organizing effort within the community and can demonstrate political clout.

The following exercise might generate a helpful board discussion **after** you have participated in the FAP webinar.

Follow up reading: *The Board Role in Fundraising* from the Center for Community Change can be found in the Appendix

⁶ Kim Klein, The Board and Fundraising ,
http://www.grassrootsfundraising.org/magazine/bod_boardandfr.html

⁷ Center for Community Change, The Board Role in Fundraising, Center for Community Change, [date](#)

Exercise 1.4.1: Who Does What? Roles in Fundraising⁸

INSTRUCTIONS: For each of the following tasks related to fundraising, indicate who within your organization has primary responsibility: the Board or the staff, or whether the responsibility is *shared*. Once you have completed the first column, discuss with your group who **should have** primary responsibility for the tasks listed.
 B = Board S = staff J = joint/shared

	Responsible Now	Should be responsible
1. To establish fundraising objectives.	_____	_____
2. To develop an annual fundraising plan for the organization.	_____	_____
3. To make an annual contribution to the organization.	_____	_____
4. To identify potential funders.	_____	_____
5. To research potential funders primarily through guides or other written materials.	_____	_____
6. To identify contacts within targeted potential funders.	_____	_____
7. To prepare proposals and other fundraising materials.	_____	_____
8. To use contacts to "get in the door" with potential funders.	_____	_____
9. To make solicitation visits.	_____	_____
10. To do follow-up to solicitation visits.	_____	_____
11. To keep records on the fundraising process.	_____	_____
12. To do outreach/marketing for special events.	_____	_____
13. To handle logistics for special events.	_____	_____
14. To maintain ongoing contact with funders.	_____	_____
15. To sign solicitation letters or letters accompanying proposals.	_____	_____

⁸ Center for Community Change, Board and Staff Roles in Fundraising, Center for Community Change, [date](#)

Section 1.5: Constituencies, Organizational Connections, and Fundraising

All organizations have constituencies. This exercise, which we will review during the webinar, will help you identify constituents based on how close to the center of your organization each constituent group is.

In preparation for the webinar, you might want to begin thinking about your constituents by completing the exercise below.

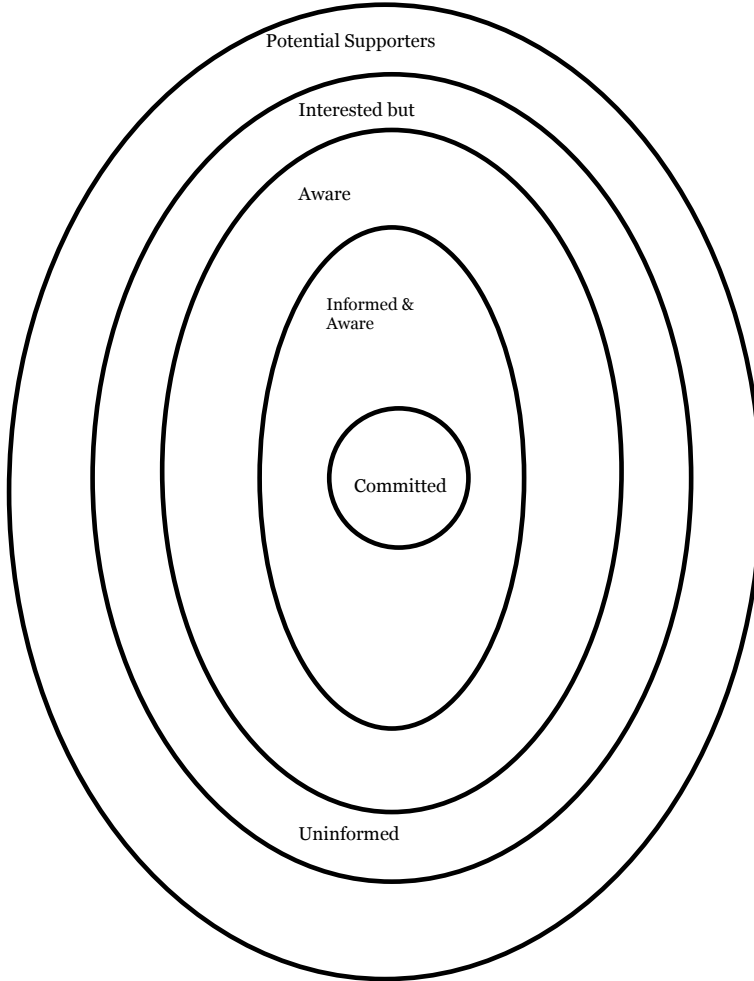
Instructions for Using Constituency Circles Exercise

Instructions

1) Think about the idea of constituencies, including the notion that constituents in some way support or believe in the work of the organization or would if they knew about it. Brainstorm various constituencies of your organization. List these below or on a blank sheet of paper.

2) Now look at the diagram below:

Constituency Circles Worksheet



Think about your constituents as grouped in concentric circles within and associated with your organization. The innermost circle represents those who are at the core or heart of your work, who are most committed and informed. The next circle out would be constituents who are informed about your issue and aware of your work, the next circle are constituents aware of your issue but with little information about your organization, next are constituents who are interested in your issue but uninformed about your work, and finally, the last circle farthest from the heart of your organization are the constituents who would be supporters but have never heard of you and maybe haven't thought about your issue but are generally concerned about your community or similar issues.

Refer back to the earlier brainstorm and decide where, in terms of support of your organization, to place those supporters you identified in the circles. Be sure to think about all the ways constituents support your organization so this doesn't become only about money. You can also use the Categories of Constituents Worksheet to identify who goes in what circle.

3) Once you feel like they have identified all of your organization's constituents, think about which ones you would like to move closer to the center of your organization's mission/vision. How do you think you might do that? Use an important upcoming event as an opportunity to brainstorm: Is the Event a possible way of doing this? How would you encourage those constituents to attend (that is, how would they publicize the event to them)? An outcome of this Event should be a shared understanding by participants of who is close to your organization and who they would like to move in closer to the heart of your organization.

Exercise 1.5.1: Categories of Constituents Worksheet

Committed Supporter – The Inner Circle

Informed and Aware Supporter – One circle out from center:

Aware Supporter – 2nd circle out from center:

Interested but Un-informed – 3rd circle from center:

Potential Supporter: Farthest from center:

Section 1.6: Building Grassroots Support: Members, Clients, & Sustainers

The anchor constituency of any grassroots fundraising program is those closest to your organizational mission and programs. Many organizations have memberships but have difficulty integrating them into their recruitment and fundraising efforts. Organizations with low-income clients are frequently conflicted about or resistant to including those clients in fundraising appeals or efforts. At the same time, many organizations are pursuing the creation of sustainer or monthly giving programs. Pat Munoz in the GRFR J article, *Monthly Giving Programs – The Basics* tells us that

Particularly good prospects for monthly giving include the following types of people:

- *Board members*
- *New members*
- *Members who regularly give several gifts a year, or who send in unsolicited gifts*
- *Members who are already using a credit card to charge gifts*

Research shows that new members, those whose first gift has been received within the last six months, are nearly twice as responsive to a monthly giving request as those who have already renewed their membership. The optimal time to solicit these new members for monthly giving is three or four months after they join. (Grassroots Fundraising Journal, May/June 2006, p. 5)

As you can see, internal cultivation of existing donors, especially members, is the place to begin for creating a sustainer program. Since newer members are more likely to become sustainers the first step in creating a sustainer program is a vigorous membership recruitment campaign.

The Iowa Citizens for Community Improvement mounted such an organizing campaign doubling their membership to 2,000 over a 6-year period and then adding another 1,000 in the next 3 years. Here's a picture of how they have gone about adding members (from: Anne O'Connor & Andy Robinson, *Membership Always Be Asking*, Grassroots Fundraising Journal, March/April 2010)

Figure 2. IA CCI Acquisition and Cultivation Program, 2008 Results

<i>Action</i>	<i>Total</i>	<i>% of total</i>
Large mass acquisition mailings	323	43.4%
Organizing		
In-house acquisition mailings	111	14.9%
Meetings	110	14.8%
Unsolicited members - most from organizing	43	5.8%
Action alerts	35	4.7%
Direct asks	28	3.8%
Complimentary membership	23	3.1%
Newsletters	23	3.1%
Gift memberships	23	3.1%
Friends (members asking others)	13	1.7%
Events	7	0.9%
Other	3	0.4%
Presentations	2	0.3%
	744	100.0%

While about 44% of new members were acquired from mass direct mail, an equal percentage joined through the group's organizing efforts. The remaining 12% came from a combination

For those of you with clients, don't forget them! Rona Fernandez lists these key points to remember about asking clients to participate in supporting the programs that they depend upon:

1. Don't assume that people won't or can't donate.
2. Call it what you will ... it's still fundraising!
3. Educate everyone in the organization about how much it costs to do the work.
4. Be respectful and value each person's giving capacity.
5. Make fundraising a part of everyone's job.

Rona Fernandez, *Fundraising in Your Own Backyard*, Grassroots Fundraising Journal, March/April 2010 p. 3-4

As you consider setting up your sustainer program you will need to have these key elements in place:

- A compelling mission, effectively communicated
- A commitment to thanking contributors regularly and keeping them informed
- A base of committed, loyal individual members or donors (the more, the better)
- Adequate time and resources to manage the program
- Software that will allow you to record and track monthly payments, or a service provider who will handle this for you
- A commitment from staff and board to build the program
- The ability to accept credit card charges, electronic funds transfers, or both

After members, your most likely pool of potential sustaining donors are:

- Current donors
- Online Activists
- Donors who make contributions using credit cards

Follow up readings, all from the Grassroots Fundraising Journal: *Monthly Giving Programs – The Basics* by Pat Munoz;
Revitalizing Your Membership Program – Why Do You Need Members And Why Do They Need You? by Ellis M. M. Robinson;
Always Asking: Using Organizing to Build Membership, by Amy O’Connor & Andy Robinson
Fundraising in Your Own Backyard: Inviting Clients to Be Donors, by Rona Fernandez can be found in the Appendix.

Section 1.7: Web & Graphic Design: Creating a Seamless Presence online, in print & in person

Each group you identified in the Constituency Circle exercise has important characteristics that you will want to consider as you plan the best way to reach them.

Supplementing the information in this section is research from the Millennial Donors report and the Next Generation of American Giving report findings. These reports will help you choose the best communication strategy for reaching constituents, members and donors. In part 2 of the FAP Webinar we will think more deeply about how you tell your organization's story. In this section we will consider the increasing importance of the online environment – search engines, web pages, social networking and e-newsletters (Twitter and mobile messaging are important as well and are covered in the supplemental materials).

A website is both a graphic presence and a functioning application that can operate simply as a single page view or with great complexity, such as the web-based real-time interactive maps used to track relief needs in Haiti or the BP oil slick in the Gulf of Mexico. While some of your organizations have highly specialized needs, for most of you there are fairly simple, accessible tools that will help you create, maintain, and update your web presence.

Attractive, intelligible graphic design is critical since you will be communicating with donors across many media – e-newsletters, Facebook Cause & Friend pages, websites, search engines, and Twitter as well as the printed page. Minimally, you will need a logo, color schemes, brief, vibrant, descriptive text, and well composed photos. Most organizations hire a consultant for both graphic and web design services. There are a few online organizations that help match web and graphics design volunteers with non-profit organizations. These include Grassroots.org and Taproot. Grassroots.org specializes in matching web and graphic design volunteers. But whether your consultant is a volunteer or paid, you want to be in control of the process. And remember, you don't have to do everything at once! Both graphic and web design are incremental processes that require time and thought.

Both foundation funders and individual donors refer to organizational websites to learn about your mission and current activities. At minimum, you want to guarantee that your website:

- ✓ To clearly identify who you are
- ✓ Be easy to navigate
- ✓ Is regularly updated
- ✓ Is relatively simple to manage and update in-house (without a consultant)
- ✓ Is equipped with a prominently displayed DONATE button

Idealware provides timely information on on-line and other technology choices for non-profit organizations. **Techsoup** is a good source of information as well as free and low-cost software for non-profits.

Here are some tips adapted from **5 Steps To Great Graphic Design for Your Non-Profit** by [Nancy Schwartz & Company](#) for hiring a graphic designer:

Step One: Take your time to find the right designer. It's best not to do this in a deadline panic. Here's how to find your designer(s):

Step Two: Gather favorite design samples. Keep a folder of favorite printed materials you feel are in the same range as your organization's image/or the image you want to establish. Bookmark websites you like as well.

Step Three: Compile your list of prospective designers. Contact colleagues in other non-profit social change organizations for recommendations. Be sure and ask about pricing, work style, and client base.

Step Four: Interview as many as you can. Narrow your list to the top three or four. Again, getting to this step before there is a critical design need is important.

Step Five: Write a creative brief the moment you think there is a pending design need for your organization.

A creative brief defines the project and its objectives, identifies audiences, presents one sentence that proposes what is unique about the organization, service or program, lists features and facts about the organization, program or service and its value to constituencies, details tone and image, specifies a budget and timeline, outline review and approval processes.

Background reading: *A Few Good Tools to Manage Content on Simple Sites*, by Laura S. Quinn, Idealware, April 2009 ([Idealware](#) provides timely information regarding on-line and other technology choices for non-profit organizations) follows. This reading can be accessed with the following link:

Follow up reading *Tips for Designing (or Redesigning) A Non-Profit Website*, by Chris Nielson, Compumentor (TechSoup) 2009 can be found in the Appendix

Section 1.8: Your Database: The Technological Nerve Center of Successful Fundraising

Exercise 3 has shown us the variety of constituents associated with your organization and potential constituents who you would like to reach. As we have discussed, fundraising, like community organizing, is about building relationships. This section will look at **databases** one of the most important tools for helping you effectively manage how you reach constituents and members. Increasingly, organizations are reaching constituents through newer medias such as email, online activism, social media sites as well as the more traditional avenues of postal mail, phone banking, in-person events and face-to-face meetings. Membership recruitment, donor solicitation, even events, can be carried out through each of these approaches. All these approaches are important but apply to different constituents depending on interest, comfort with technology, their giving habits and other demographics.

A good database can help you keep track of who is currently a supporter, how they like to hear from you, their interests, event support and other key data. It will also help you determine the best approach to a new constituent.

Demographics are a key consideration in determining how you might approach a donor. There are a couple of recent studies – *Millennial Donors: A Study of Millennial Giving and Engagement Habits*⁹ and *The Next Generation of American Giving*¹⁰ examine giving preferences of donors ranging from age 20 to 80 years old.

Twenty to 40 year olds are the generation we want to begin recruiting to our organizations. We can help shape their donation habits.

Here are some of the key findings from the Millennial Donor Report (for webinar I have a graph or two):

⁹ Millennial Donors ...

- 91% of Millennial donors are at least somewhat likely to respond to a face-to-face request for money from a nonprofit organization, with 27 percent being highly likely to respond to such a request. Only 8 percent are highly likely to respond to an email request.
- 55.2% of Millennial donors are likely or highly likely to respond to a specific request or particular project. 55.7% are not likely to respond to a general, non-specific ask.
- 71.9% of Millennial donors don't need to volunteer for an organization before they donate.
- Millennial donors want to know details about the organizations they support: 86.3 percent want updates on programs or services, and 54.6 percent want information about the organization and its financial condition. 68 percent want information about volunteer opportunities.
- 60.5% say they would like access to board and executive leadership, and 53.2% say they have it.
- Asked who could get them to donate to an organization, most Millennial donors say they would be likely or highly likely to give if asked by a family member (74.6%) or a friend (62.8%). Only 37.8% would be likely or highly likely to give if asked by a coworker.
- 71.7% of Millennial donors said they'd be willing to communicate with friends and family about ways to be involved in an organization they support.
- Email is Millennial donors' most preferred communication method, with 93% of respondents favoring it for receiving information from organizations. Facebook and print lag behind at 23.8% and 26.9%, respectively.
- When a Millennial donor uses technology to find out about a nonprofit organization, Google is the donor's first stop, with 86.4% of respondents citing the search engine. 71.5% rely on email, and 51.2% use Facebook to find information on organizations.



“I really have a passion for making the world a better place, and wish I had more opportunities to do so. Being a part of making the big picture decisions for organizations I care about would be a great learning experience and would really give me the sense that I was making a difference.”

What database will help you keep track of all this information? Well, as with all things technical, it depends.

Laura Quinn of Idealware, an organization dedicated to helping non-profits make smart software decision,” provided these definitions of CRM and DRM software in a recent Grassroots Fundraising Journal article:

What type of system you use will depend on your specific needs. There are three basic types, each ranging widely in cost depending on the features you want.

- Donor Management (DRM or Donor Relationship Management). These systems provide targeted support to track donors, prospects, pledges, premiums and giving levels, matching gifts, and sometimes grants and corporate sponsorships. Some provide support for additional constituents, such as event attendees, volunteers, or members. However, these systems are best suited for organizations where individual fundraising is one of the top organizational priorities. Giftworks, eTapestry, and DonorPerfect Online are common, fairly low-cost donor management systems ...

- Constituent Relationship Management (CRM). These systems are designed to track comprehensive data about each constituent—not only their donations and membership dues, but also, potentially, their event attendance, volunteer record, and anything else you might care to track. These systems are not designed to specialize in any one specific function. Instead, they’re typically flexible to let you tailor them to the processes you need to support. If constituents have complicated relationships with your organization, or tend to cross organizational boundaries—for example, program alumni often become donors—a CRM can be a useful way to get a full picture of each constituent. Salesforce .com, CiviCRM, and Sugar CRM are common systems in this area. All three are free for small organizations, but they take some technical skills to set up.

- Integrated Online Systems. These types of systems combine different online functions in a single package. For example, they’ll often let you track donors and other constituents, send broadcast emails, take donations and event registrations online, and even manage a website, all in one system. It can save you a lot of time and hassle to have all this data in one place, but make sure your other needs are also met—these online specialty tools often aren’t as strong at helping with direct mail processes and donor list-generation tasks as donor management systems. To take full advantage of these tools, small organizations typically use them to replace any existing constituent databases. Wild Apricot, Z2 by Neon, and Salsa by Democracy in Action are some common, less expensive integrated systems.

In practice, these three basic system types aren’t as distinct as they might seem. For instance, some systems offer a lot of support for donor management, considerable flexibility to track other constituents, and some support for broadcast email and online donations. Are they donor, integrated online, or CRM systems? It doesn’t matter, as long as they meet your needs.

Software to Support Your Fundraising, GRFR May-June 2010

How to Choose? Again, from Idealware:

- Don't overprioritize price
- Make a plan for all your constituents and interactions
- Understand your own donor processes
- Identify your communication priorities
- Weigh flexibility vs. complexity
- Consider the priority of accounting control

The following chart shows the most commonly used CRM, DRM and Integrated databases by their appropriateness depending on your organization's size, resources, number of constituents, potential for growth, technical ability and fundraising approaches.

The complete Idealware publication: *A Consumers Guide to Low Cost Donor Management Systems* is included in the Appendix.

RECOMMENDATION MATRIX

To help you navigate your way through the full list of systems, we've compiled our recommendations into a chart and added some information about price and technical infrastructure. All prices are specifically for the first year.

	Recommended for:														
	Price: 1 user, 900 donors	Price: Full features, 3 users, 5000 donors	Installed	Online Hosted	Complete Mac Support*	Just the Basics	Tiny but Growing	Easy to Set up & Use	Events are Critical	Free, for Techies	Track All Constituents	Online Integration	Highly Configurable	Best Fundraising	Also Good Values
BasicFunder Premier	\$	\$	●		●										
CiviCRM	-	-		●					●	●	●	●			
Common Ground	\$\$\$	\$\$\$\$		●						●		●	●		
Community Enterprise	\$	\$\$\$\$\$		●						●	●				
The Databank	\$\$\$	\$\$\$		●											●
DenariOnline	\$	\$\$		●	●										●
DONATION	\$	\$	●		●										
Donation Director	\$\$	\$\$	●												●
Donarius	\$	\$	●												
DonorPerfect Installed	\$\$\$	\$\$\$\$\$	●					●		●	●	●	●		
DonorPerfect Online	\$	\$\$\$\$\$		●		●	●			●	●	●	●		
DonorPro	\$\$\$\$	\$\$\$\$\$		●	●		●	●		●	●	●	●		
eTapestry	\$	\$\$\$\$\$		●	●	●	●			●	●	●	●		
Exceed! Basic	\$	\$	●	●	●	●	●								
Exceed! Premier	\$\$\$	\$\$\$\$\$	●	●	●			●							
FastFund Raising	\$	\$\$	●												
FUNDimensions	\$\$\$	\$\$\$\$\$	●		●										
Fundraiser Select	\$\$	\$\$\$\$\$	●							●					
GiftWorks	\$	\$\$\$\$	●		●	●	●	●							
Income Manager	\$\$	\$\$	●	●											
LifeLine Nonprofit Management	\$	\$	●		●		●								
MatchMaker FundRaising	\$\$	\$\$\$\$\$	●												●
Membership and Fundraising Suite	\$	\$	●		●	●									
Metrix	-	-	●							●					
MissionAssist	\$\$	\$\$\$	●					●							●
Neon	\$	\$\$\$\$		●		●		●		●	●				
Orange Leap MPX Installed	-	-	●					●	●	●		●	●		
Orange Leap MPX Hosted	\$\$	\$\$\$\$\$		●			●	●		●				●	
Organizers Database (ODB)	-	-			●					●					
ResultsPlus	\$\$	\$\$\$\$\$	●	●											
Sage Fundraising 50	\$\$\$\$	\$\$\$\$\$	●				●	●		●				●	
Salesforce.com	-	-		●					●				●		
Salsa	\$\$	\$\$\$\$\$		●							●				
Total Info	\$	\$\$\$	●		●			●		●	●			●	

\$: Under \$1000 \$\$\$\$: \$3000-\$3999
 \$\$: \$1000-\$1999 \$\$\$\$\$: \$4000+
 \$\$\$: \$2000-\$2999

*Systems that support Mac integrated mail-merging. If you don't need integrated mail-merge, you can use any online hosted system from a Mac.

And the Top Ten:

Feature Comparison

We evaluated each of our top ten systems based on a list of 127 criteria, divided into 18 categories. This matrix summarizes our findings (the rating scheme itself is defined in Appendix B). See the next page for pricing information.

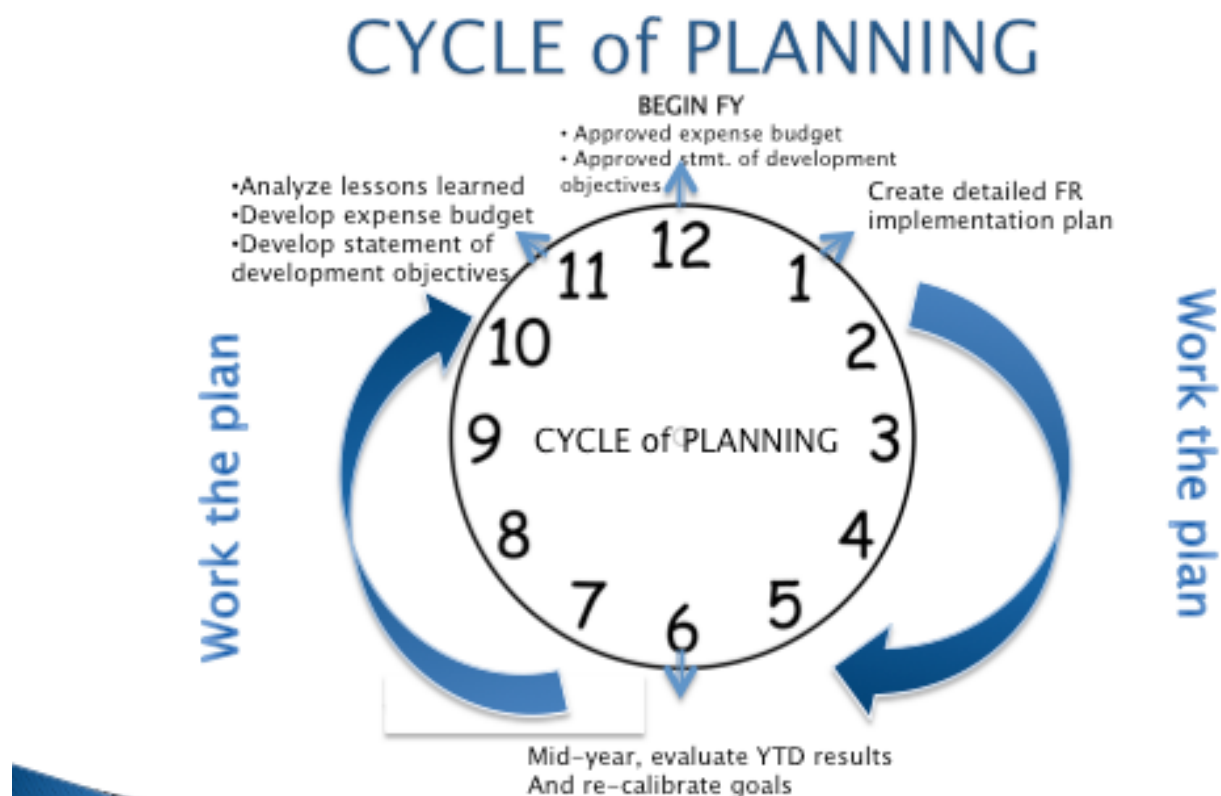
	Common Ground	DonorPerfect Installed (Basic) *	DonorPerfect Installed (Full) *	DonorPerfect Online (Basic) *	DonorPerfect Online (Full) *	DonorPro	eTapestry (Basic)*	eTapestry (Full)*	Giftworks Standard (Basic)*	Giftworks Premium (Full)*	Neon	Orange Leap MPX Installed **	Sage Fundraising 50	Total Info
Adding and Tracking Donations	●	●	●	●	●	●	●	●	●	●	○	●	●	●
Managing Donor Information	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Prospecting and Proposals	●	●	●	●	●	●	●	●	○	○	○	●	●	●
Permissions	●	●	●	●	●	●	●	●	●	●	○	●	●	●
Mail-Merging Letters	●	●	●	●	●	●	○	○	●	●	○	●	●	●
Emailing	●	○	○	○	○	●	●	●	●	●	●	●	●	●
Querying	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Reporting	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Payments & Web Site Integration	●	●	●	●	●	●	○	●	●	●	●	○	●	○
Tracking Events	○	●	●	○	○	●	○	○	○	●	●	●	●	●
Tracking Other Built-In Interactions	○	●	●	●	●	●	○	○	○	●	●	●	●	●
Customization	●	●	●	●	●	●	●	●	○	●	●	●**	○	●
Integration	●	○	●	●	●	●	○	●	○	○	○	●	●	●
Accounting Support	●	●	●	●	●	●	○	○	●	●	○	●	●	●
Ease of Use	○	●	●	●	●	●	○	○	●	●	●	●	●	○
Extent of Support and Training	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Ease of Installation & Maintenance	●	●	●	●	●	●	●	●	●	●	●	○**	●	○
Product Background	○	●	●	●	●	●	●	●	●	●	●	●	●	●

* **Basic** refers to the cheapest version of the system you can buy; **Full** to the version with all relevant modules and upgrades.

** Orange Leap MPX also offers a hosted version. The ratings for it are identical except it received a Fair in Customization and an Excellent in Ease of Installation and Maintenance.

Section 1.9: The Fundraising Plan & the Fundraising Calendar

No amount of technology, flashy graphic design, or brilliant fundraising ideas will do you any good without a plan. Fundraising is a year-round activity, involving all those who you identify as central to the accomplishment of your mission – Board of directors, staff, volunteer leaders, core membership and your fundraising committee(s).



The following chart is a simple plan with deadlines that you might consider using in creating your grassroots and donor fundraising program:¹¹

Follow up reading: *How to Plan Your Fundraising Strategy: Keep Your Organization Financially on Track with a Year-Round Plan*, by Pat Munoz and Liz Raisbeck, *Grassroots Fundraising Journal*, February 1997 can be found in the Appendix.

¹¹ Pat Munoz & Liz Raisbeck, *How to Plan Your Fundraising Strategy: Keep Your Organization Financially on Track with a Year-Round Plan*, *Grassroots Fundraising Journal*, February 1997

SAMPLE FUNDRAISING PLAN — ABC River Organization

STRATEGY	GOAL(S)	ACTION STEPS	WHO	WHEN	HOW MUCH
1. New Member Acquisition	500 new members \$9,000	1. Do 2 direct mail campaigns to 10,000 prospects each (300) 2. Each board members recruits 1 member/month (120) 3. Participants in raft trips become members (50) 4. Buyers of books of raffle tickets become members (30)	Staff & consultant BD Staff Staff	May & Sept Monthly Summer Fall	\$7,000 no cost no cost no cost
2. Renewals	100 out of 154 (65%) \$2,000	1. Call last year's unrenewed members, asking them to renew 2. Do 3 mailings to current members, spaced 1 month apart 3. Call unrenewed members, asking them to renew	Staff/Vols Staff Staff/Vols	January Jan–March May	\$50 \$400 \$50
3. Special Appeals	\$2,000	1. Prepare a special appeal to all members on lawsuit 2. Prepare a follow-up request in six weeks	Staff Staff	Mid Oct Early Dec	\$400 \$100
4. Special Events	\$10,000	Hold a raffle which will generate money, educate the public, and recruit members	BD Committee	June–Oct	\$2,500
5. Major Donors	\$5,000 30 Donors: 20 @ \$100 8 @ \$250 2 @ \$500	1. Research names of potential major donors (120 names) 2. Create a special donor club with special benefits 3. Schedule personal visits with as many of these as possible to ask for money 4. Where visits not possible, call or write a personal letter	Staff/BD Staff Staff/BD Staff/BD	Ongoing	\$500
6. Businesses	\$2,000	1. Talk with local businesses and ask them to sign on as "Friends" with a gift of \$100 2. Send proposals out to selected corporations	Staff/Vols BD Committee	Jun–Jul May	\$100 \$100
7. Foundations	\$25,000 -0- (funds will come in next year)	1. Research & prepare a list of foundation prospects 2. Prepare & mail out proposals 3. Follow up	Intern Staff Staff	Jan Feb April	no cost \$100 no cost
8. Workplace Giving	-0- (funds will come in next year)	Apply for admission to state environmental federation or local Combined Fed Campaign	Staff or BD member	Fall	no cost
9. Planned Giving		Put an ad about bequests in every other issue of newsletter	Staff	Ongoing	no cost
TOTAL INCOME	\$55,000			TOTAL EXPENSES	\$11,300

Key: BD = Board Members Vols = Volunteers

Section 1.10: Organizational Capacity for FR: Leadership & Fundraising

What does it take for your organization to begin the process of creating a grassroots and donor fundraising program? Like any organizing efforts, there are a few couple fundamentals:

- √ Patience – this is an incremental process. It will build at the pace your organization can manage, no faster ... or slower.
- √ Openness to new ideas – because we are social change agents this should be easy. New ideas are our life force.
- √ Hard work – goes without saying?
- √ Planning, planning and more planning – this will most support the incremental growth of your fundraising program.

But there is a deeper assessment of readiness we would like you to consider, your organizational readiness to begin this big new effort.

The Grassroots and Donor Fundraising Readiness Assessment (below) is a tool to help you think about your organization's capacity for fundraising, where your strengths lie and what areas need to strengthen. We will discuss this during the webinar. **The following questions will help you prepare:**

Exercise 1.10.1: Questions To Ask Yourself When Studying the Flow Chart

- How are we financially -- Stable? On the edge? Panic-stricken?
- Have you discussed a new approach to fundraising with your volunteer leadership? How do they feel about it – ready to go? Skeptical? Panic-stricken?
- How does the Executive Director feel about this new approach? Ready to Go? Skeptical? Overwhelmed?
- If volunteer leadership and the ED are doubtful, are they – willing to set doubts aside and give it a try? Resistant but willing to take the first step? Can't go there?
- How does the staff feel? Too much new work? Willing to try it out? It's about time?
- Is there a core group of leaders excited, interested, willing to give it a go? This might include board members, volunteer and member leadership, and individual staff members?
- If there is too much resistance, what are the three things that would bring about more willingness to try?
 1. _____
 2. _____
 3. _____

Bonus Reading: *They Said They Would Raise Money – Now What?* by Andy Robinson, Grassroots Fundraising Journal, July-August 2008 can be found in the Appendix.